



Values in Shock

The role of contrasting management, economic, and religious paradigms in the workplace

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Preface

The values in the workplace have never before suffered so much change since the beginning of the XXI century. The pace of change has been accelerating for decades mainly due to the rapid technological evolution, the overthrow of border barriers, globalisation, and the clash of economic national and regional powers. Over the last two decades, however, the crisis of the financial system and its economic consequences, affecting more or less all countries worldwide, have not only directly changed the values in the workplace, but also impacted family structures, individual beliefs and the role of religions in most societies across the globe.

The world has become more homogenous but also more unequal. On one hand, despite the persistence of slave labour in some regions and countries, and also of the dehumanized work in some niches of the most developed economies, the conditions of life and work have generally been improving, and especially after the end of the Second World War. On the other hand the crisis that hit most economies in 2008 has widened classical gaps between rich and poor, between ideological systems, and between existing social and political models. Further trends contributing to this new reality are the increase in longevity, the democratization of education, and the massive migration movements due to all sorts of reasons.

The economies of developed countries react with the deregulation of employment law, initially creating new concepts in labour relations, such as flexi security, and in some cases progressing to the abolition of rights acquired by workers; in other cases, however, this movement seems to go in the opposite direction, with more working (and human) rights conquered by a long-standing oppressed society. In addition, new and powerful players enter the global chessboard in which people, families, groups and organisations live and work.

As these ongoing changes mark the present and shape the future, scientists and academics in the various branches of human and social sciences try to make sense of this metamorphic and confusing reality. The proposed XIV conference ISSWOV challenge – *The role of contrasting management, economic, and religious paradigms in the workplace* – was echoed by the researchers who have contributed with a significant number of texts included in this publication. It was a great pleasure to read the different contributions and such diverse ideas. It is therefore a privilege to publish them. No doubt readers will find numerous areas for reflexion.

Jorge F. S. Gomes & Joaquim P. Coelho
Lisbon, Portugal
Editors
June 15, 2014

About ISSWOV

ISSWOV was founded in Budapest, 1988, by the participants of the first International Conference on Work Values initiated by Prof. Dov Elizur, an organizational psychologist from Israel, and Prof. Istvan Magyari-Beck, from the Budapest University of Economics. Prof. Elizur was nominated as the first ISSWOV president in Budapest, 1988. The organization aims to advance the study of work and organizational values and related aspects of the organization; to encourage the exchange of ideas and interaction among scholars engaged in the study of work and organizational values; to collect, generate, preserve, decipher, and disseminate data and information relating to work and organizational values, and to encourage and initiate publications concerning research on work and organizational values.

ISSWOV organizes an international conference every two years. The first international conference took place in June, 1988, in Budapest, Hungary. The subsequent international conferences were in Prague, Czech Republic (1990), Karlovy Vary, Czech Republic (1992), Barcelona, Spain (1994), Montreal, Canada (1996), Istanbul, Turkey (1998), Jerusalem, Israel (2000), Warsaw, Poland (2002), New Orleans, USA (2004), Tallinn, Estonia (2006), Singapore (2008), Estoril-Lisbon, Portugal (2010), and Goa, India (2012).

The organization publishes an internal newsletter twice a year. Also, ISSWOV publishes the proceedings of the international conferences. It is affiliated with the International Journal of Cross Cultural Management.

The main countries which our 700 members come from are:

Argentina, Australia, Austria, Barbados, Belgium, Brazil, Bulgaria, Canada, Chile, China, Denmark, Estonia, Fiji, Finland, France, Germany, Great Britain, Greece, Hong Kong, Hungary, India, Ireland, Israel, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Norway, Pakistan, Poland, Portugal, Romania, Russia, Serbia, Singapore, Slovakia, Slovenia, South Africa, Spain, Sri Lanka, Sweden, Switzerland, Taiwan, Ukraine, USA, Venezuela.

Chapter 1: Leadership and Teams

Toward balancing autonomy and team-external leadership

James P. Hess, Goshen College, USA

Abstract

A proliferation of autonomous teams in recent years has reshaped leadership and decision-making hierarchies across industries. Knowledge sharing and individual autonomy are surfacing at all organizational levels as organizational leaders tap into employee ingenuity to exploit new ideas and business solutions through autonomous teams. Yet, organizational leaders develop paradigms about appropriate levels of team autonomy that are often incongruous with team members' expectations for team-external leader involvement. Thus, this paper explores these contrasting paradigms, revealing leader-driven organizational dynamics that members of autonomous teams specifically attribute to their success. Results from this study will benefit organizational leaders as they work to more closely align the level of autonomy bestowed on teams with team members' expectations for leader involvement.

Introduction

Particularly popular in contemporary organizations is the use of autonomous teams (Kuipers & Stoker, 2009). Participation on autonomous teams allows team members to make all decisions and determine the best way to design and complete all necessary team tasks without the interrupted authority of a traditional organizational leader (Devaro, 2008). Thus, where centralized decision making was once commonplace, knowledge sharing and individual autonomy are emerging at all organizational levels (Choi, Lee & Yoo, 2010; Haas, 2010). Literature supporting the positive psychological impact of participation on autonomous teams in the workplace is widespread. For example, Fausing, Jeppesen, Jonsson, Lewandowski, and Bligh (2013) indicated that participating on autonomous teams improves individuals' levels of employee satisfaction and productivity. Leach, Wall, Rogelberg & Jackson (2005) further argued that self-directed, interdependent activities among members of autonomous teams enhance members' knowledge, skills, and abilities, improving their effectiveness as contributors to team tasks and as developers of team outcomes. In addition, Mumford and Mattson (2009) described the increased feelings of involvement and ownership in a team's work that result when autonomy is bestowed on team members. Yet, scholar-practitioners remain curious about the incongruity between what autonomous team members expect from team-external leaders and the organizational dynamics fostered by those leaders to optimize autonomy. Therefore, this paper presents findings from a qualitative study that explores the contrasting paradigms surrounding team members' and organizational leaders' approaches to autonomous teams.

Literature Review: Autonomous Teams

A review of literature reveals a particularly strong preference for autonomous teams as a popular approach to achieving organizational objectives. Also emerging in existing literature is the role of autonomous teams in replacing traditional organizational hierarchies, as well as the push for team-external leaders to bestow optimal levels of autonomy on teams. Introduction to literature contributions in these areas complements the later discussion of the completed study.

Preference for Autonomous Teams

Noted in the literature is the preference for autonomous teams over other team types. For example, Devaro (2008) stated that autonomous teams are perceived as superior to nonautonomous teams, given the high levels of empowerment with which goal-oriented team members from a broad spectrum of functional areas work with few external controls. In addition, McCreery and Bloom (2002) credited autonomous teams for having the highest level of responsibility among all team types, allowing team members to make all related decisions and to determine the optimal way to structure and complete their work as team members assume many of the responsibilities of their supervisors. Thus, autonomous teams become a formal part of organizational structure, decentralizing decision making, simplifying organizational structure, and reducing the need for coordinated communication between hierarchical layers.

Replacing Traditional Hierarchies

Traditional hierarchical structures are no longer effective in all organizations. In recent years, organizational leaders have bestowed higher levels of autonomy on organizational members through teams, creating a more democratic and integrative way of working and enriching everyone's work roles to enhance organizational performance (Gratton, 2003). What results from the use of autonomous teams in replacing traditional hierarchies are: a) enhanced innovation levels, b) a dispersion of leader roles, and c) a redistribution of operational processes.

Team Innovation. A significant benefit of autonomous teams as replacements for traditional hierarchies is their role to generate and assimilate creativity and innovation. Dess and Picken (2000) highlighted that "more capable leadership is not necessarily the answer", but that "firms must increasingly rely on the knowledge, skills, and experience, and judgment of *all* their people" when learning to compete in new ways (p. 18). According to Gratton (2003), autonomous teams are more innovative than other team types, allowing members wider latitude of discretion in which to work to enhance variety when developing decision alternatives. Jiang (2010) supported Gratton, stating that high levels of empowerment promote team members' involvement and excite their innovative abilities, enhancing their sense of ownership in the organization as their ideas are implemented. Yet, organizational leaders also play an integral role in fueling a continuous flow of creativity from team members. According to Amabile and Khaire (2008), leaders have a responsibility to unleash new ideas from employees' imaginations. Instead of leaders being the source of new ideas, empowering employees through autonomous teams harnesses innovation through which increased competitiveness can follow.

Dispersed Leader Roles. As autonomous teams replace traditional leadership structures, leadership roles are dispersed among team members. According to Thornton, Ribeiro-Soriano, and Urbano (2011), organizational leaders must set an entrepreneurial tone from which employees are driven to assume decision-making roles. When using autonomous teams, leaders are transformed into mentors and coaches (Gaur, 2006). Leader functions become employee-centered, for example, based on the team's need for a teacher, information provider, decision maker, or some other type of supporter. Thus, to identify new leadership roles that support and complement any structural changes and to align those roles with the work of autonomous teams will renew the leader's value to the organization.

Redistributed Processes. A redistribution of some key organizational processes occurs as autonomous teams replace traditional leadership roles (Minguela-Rata & Arias-Aranda, 2009). First, the decentralization of authority that accompanies autonomous teams alters the

traditional decision-making hierarchy. Hackman (2002) argued that team autonomy permits members to make task decisions without obligation to consult with organizational leaders who might interrupt the team's work. Second, task interdependence becomes a major determinant of autonomous team effectiveness. According to Morgeson, Johnson, Campion, Medsker, and Mumford (2006), high levels of team autonomy reduce team-external interruptions, easing the process in building interdependence to complete team tasks; yet, Mumford and Mattson (2009) suggested that too much interdependence stifles the effective implementation of team processes, including goal setting and knowledge sharing. Finally, another key process redistributed with use of autonomous teams is external knowledge management. Morgeson et al. (2006) stressed that a lack of knowledge can undermine the effort of autonomous teams. Haas (2010) concluded that combining autonomy and external knowledge can increase team efficiency, such as when team members collect and use relevant external knowledge to learn about new options for achieving strategic goals, for example, or when team members avoid spending unnecessary time formulating solutions to problems that may be found among external knowledge sources.

Optimizing Team Autonomy

Appropriate levels of team autonomy can simultaneously improve both team-members' well-being and organizational performance (Kuipers & Stoker, 2009). For example, positive attitudinal and behavioral outcomes among empowered team members may positively impact the organization's overall operational and financial outcomes. Parker (2003) warned that too much autonomy increases team members' stress levels as they work to fulfill organizational leaders' expectations of them, while too little autonomy or reductions in autonomy prevent employees from using their skills and talents to full capacity. Therefore, organizational leaders are reminded to optimize team autonomy to achieve ultimate advantages from it. Three advantages of optimizing team autonomy include: (a) enhanced team-member knowledge, skills, and abilities (KSAs); (b) improved member motivation; and (c) increased worker productivity.

Knowledge, Skills and Abilities (KSAs). Through active learning and team participation, team members with appropriate levels of autonomy are able to further develop their pools of knowledge, skills, and abilities, collectively known as KSAs (Leach et al., 2005). These researchers conducted their research in a steel manufacturing facility in the UK, using input from 174 team members on 41 teams. The use of hierarchical regression analyses revealed the direct association of appropriate levels of autonomy with KSAs and their link to greater team performance and lower team stress. Thus, bestowing autonomy on team members is an effective strategy for enhancing team-member KSAs and ultimately building team effectiveness. From a study of 43 teams in three South Korean manufacturing facilities, Shin and Choi (2010) also found that KSAs are complementary resources among team members as they tap into the experiences of each other in an effort to reduce team-member stress in making the most effective decisions. Through collaboration and information sharing over time, team members acquire new, more applicable sets of KSAs that complement those of other team members, allowing them to abandon ineffective behaviors and improve team processes.

Motivation. Because members share integrated work processes, which result in a greater sense of ownership in team outcomes, participation on autonomous teams transforms apathetic employees into responsible, accountable team members (Sahoo & Das, 2011). Motivation pushes team members to expect more from other team members and to set higher expectations for themselves. In studying the dependence of motivation on autonomy,

Morgeson and Campion (2003) determined that autonomous team members become increasingly motivated to independently make meaningful decisions as they collaborate with each other over time.

Productivity. One final advantage of optimizing team autonomy is higher productivity. From a case study of assembly workers at the Volvo Manufacturing plant in Umeå, Sweden, Kuipers and DeWitte (2005) found that productivity increases significantly and team members exercise greater efficiency when solving non-routine problems as teams assume more autonomous roles. Thus, autonomous team members are equipped to effectively handle fluctuations in task demands and needed changes in team processes as a result of being empowered to have greater flexibility and adaptability. Further, Leach et al. (2005) argued that autonomy fuels productivity by reducing strain as team members encounter less disputable team-external interference and are allowed to embrace self-direction in their work.

Methodology

In this exploratory study, three participants from each of six autonomous teams were interviewed independently to capture their perceptions of work in designing and implementing a quality-improvement initiative in their respective higher educational institutions in the US. Collected data were intended to reflect differences between team members' expected levels of team-external leader involvement and actual levels of leader involvement in nurturing organizational dynamics conducive to optimizing team autonomy. Participants represented a range of faculty members, administrators, and other staff members.

Data Collection

Participant feedback from a series of open-ended interview questions was sought to answer the central research question: *To what organizational dynamics do team members most attribute the success of autonomous teams?* The interview questions provided the opportunity for participants to focus on the presence or absence of specific organizational dynamics surrounding their team experiences that shaped their expectations for leader involvement and their perceptions of actual leader involvement in optimizing team autonomy. All interviews were recorded and transcribed.

Thematic Data Analysis. Data were coded and arranged in meaningful categories, followed by use of thematic analysis. Thus, chunks of data were analyzed from which themes emerged across the entire data set. From this iterative process, themes were combined to reflect participants' collective experiences.

Results

To maintain anonymity of the institutions from which participants were recruited, the six institutions in this study are merely referred to as A, B, C, D, E, and F. Participants from A, B, and C maintained overall positive perceptions of their team experiences as measured by successful implementations of team outcomes, while participants from D, E, and F held negative perceptions caused by failed outcome implementations. Further, the thematic analysis revealed that participants from successful teams expected levels of team-external leader involvement that were congruous with the actual levels of leader involvement in nurturing organizational dynamics most conducive to optimizing team autonomy. Yet, participants from failed teams blamed their failures on organizational dynamics not conducive

to generating optimal levels of autonomy. Two categories of themes emerged in the data, representing participant perceptions from success and failed teams.

Themes from A, B, and C

Three predominant themes emerged that attributed to the successful outcome implementation at A, B, and C: a) institution-wide commitment to autonomous teams, b) leader commitment to resources, and c) feedback.

Institution-Wide Commitment. The major catalyst for institution-wide commitment to autonomous teams was the top leader at the institution. Top leaders were credited for directly shaping the expectations of team members. Participants stated either that the top leader took personal ownership in team processes or that the top leader led the charge in administrative support of teams' work. In addition, the team culture molded by leaders fueled the desire to participate on autonomous teams. Finally, team members perceived the level of autonomy bestowed on them to be optimal, resulting in higher collaboration and interdependence.

Leader Commitment to Resources. Especially motivating to team members was the availability of needed organizational resources and an upfront leader commitment to them that remained steadfast throughout the team's life. Participants also noted a high degree of team-member satisfaction when re-allocation of resources became necessary, as long as leaders made a concerted effort to be fair in their re-allocation processes. In such cases, team members remained committed in their work, even willing to alter team objectives impacted by change in resource availability.

Leader Feedback. Frequent, face-to-face communication was recognized as generating the most positive, constructive feedback from team-external leaders while building emotional support and confidence in developing team processes. Participants also agreed that feedback should be expected at regular intervals, not just at the start and finish of a team's life. Further, feedback was not viewed as a threat to the team's autonomy if it was expected and occurred at frequent intervals.

Themes from D, E, and F

Two predominant themes emerged that attributed to the failed outcome implementations at D, E, and F: a) a weak institutional commitment to autonomous teams; and b) a weak team culture.

Weak Institutional Commitment. Participants expressed concern over little or no general awareness of autonomous teams in their institutions, including a lack of team updates within internal communications. However, a weak commitment to autonomous teams was largely blamed on organizational leaders' reliance on the same individuals to participate on teams and on organizational members being content to report-out a recommendation without taking steps toward implementation. Further, no upfront commitment to needed resources signaled that outcome implementation may not be a priority, leaving the impression that a team recommendation without plans for implementation was acceptable.

Weak Team Culture. Participants from failed teams blamed their failure on weak team cultures due to a lack of autonomy bestowed on them. Participants felt constrained by too much team-external involvement in their decision-making processes, indicating a perceived lack of trust in their decision-making abilities. Finally, participants perceived a "silo

mentality” among organizational members who were consistently chosen for team participation, fueling an us-versus-them mindset in the institution.

Discussion

Significant attention is directed toward top organizational leaders in shaping organizational dynamics that foster optimal levels of autonomy to inspire success of autonomous teams. Members of successful autonomous teams accord the greatest credit to top leaders for their successful outcome implementations, while members of failed autonomous teams blame top leaders first. What cultivates team success is the alignment of team-external leaders’ paradigms about shaping organizational dynamics conducive to generating optimal levels of team autonomy with team members’ paradigms about the level of expected leader involvement in their teams’ work. Several key points from the study warrant further discussion as efforts are made to align these contrasting paradigms.

First, autonomous teams thrive in empowering environment, which requires top leaders to purposefully alter their managerial practices if they fall short of team-member expectations. Members of autonomous teams function best when influenced by an organization-wide commitment to their use, driven by high leader expectations for successful implementations of their outcomes. In addition, commitment to and allocation of organizational resources for team use warrant unwavering attention among organizational leaders as these process fuel team-member motivation significantly. In particular, organizational leaders should be cautioned that an upfront commitment to needed resources is a powerful indicator of the seriousness with which organizational leaders consider the team’s purpose; mid-stream reductions or re-allocations in resources, if unexplained or perceived to be unfair, will indicate a loss of autonomy and derail the team’s momentum. Next, frequent, face-to-face communication at regular intervals with team-external leaders provides the most constructive feedback for team members and is less likely to be viewed as a threat to autonomy than if infrequent or unexpected. Finally, biased team recruitment methods tend to undermine team-member perceptions of the team’s importance; team members appreciate an equal chance of being selected for team participation.

Limitations of the Study

Some limitations worthy of mention came to light in the study. First, a successful outcome implementation may not always be the only determinant of a successful autonomous team in every situation. Second, though less directly influenced by organizational leaders various *team* dynamics may have also impacted team outcomes or perceptions of autonomy in addition to *organizational* dynamics. Third, collective assumptions were made from the data though the scope of participants’ team projects may have varied and their institutional roles may have tainted their perceptions. Finally, results from this study may not be generalizable across industries, inviting researchers to consider other organizational types in future studies.

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Leadership strengthening school's internal coherence: A prerequisite for instructional improvement

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Abstract

The aim of the present study was to explore the way personal epistemological beliefs, values, regularities, routines and practices that school principals undertake, in order to shape and strengthening school's internal coherence, intention to produce high levels of instructional practice reliably. This aim was based on the recommendation to improve school quality by refocusing principals on leading teaching and learning, their core mission. Qualitative research methodologies were used with one principal and 31 teachers in one Jewish elementary school in Israel. Findings indicate relatively high cohesion between the principal's constructivist epistemological beliefs and staff beliefs expressed through teaching methods in relation to students, and between these beliefs, regularities, routines and practices that the principal uses, and between them and teacher practices.

Introduction and background

Researchers agree that effective principals' leadership is critical for both school and student success (Fulton & Britton, 2011; Louis, Leithwood, Wahlstrom & Anderson, 2010). Despite the heavy investment in educational reforms, many public reports provide a sad picture of a failing educational system. One possible direction for change suggested by the literature is a renewed focus of the work of school principals in leading teaching and learning – their core mission (Goldring, Porter, Murphy, Elliott & Cravens, 2007). The capacity of schools to produce high levels of instructional practice reliably is a function of the internal coherence, in the organization around values, norms, expectations, and routines for getting the work done (Elmore, 2006). These processes may make the difference between a school's success and failure (Hallinger & Heck, 1998; Elmore, 2006). Sammons (1999) found that effective schools are characterized, among other things, by a proactive professional leadership, common aims and vision, and ongoing organizational learning focused on improvement of teaching and learning. A study conducted in 96 secondary schools in Australia discovered that a transformational leadership style allowing the teachers to participate in decision making processes, challenging the staff to examine and re-examine the basic assumptions about their work and reconsider how it can be carried out in the best way possible, contributes to meaningful organizational learning, which in turn improves school effectiveness (Silins & Mulford, 2002). An analysis of 24 studies examining the relationship between the principal's leadership and the students' achievements points at certain dimensions which seem to have a positive effect on student achievement: setting clear goals and agreed-upon expectations together with the teaching staff; direct involvement in planning, coordinating, support and assessment of teaching and curriculum planning; encouragement of and active participation in the teachers' learning and development (Robinson, Lloyd & Rowe, 2008). A study conducted in 104 elementary schools in Israel points at a significant positive relationship between the principal's transformational leadership style and the level of organizational-pedagogic learning, and between it and the teachers' level of effort, their satisfaction, and the students' tendency towards high academic achievement (Kurland, Peretz & Hertz-Lazarowitz, 2010). Formal organizational regularities and learning processes allow the school staff to create new knowledge and assimilate it in the school's routines and regularities. The capacity of schools to produce high levels of instructional practice reliably is a function of the internal coherence,

in the organization around beliefs, values, norms, expectations, and routines for getting the work done (Elmore, 2006). Thus, Principals' personal beliefs and value have an important role in leading teaching and learning processes. Principal beliefs dictate his/her behaviors, through which s/he motivates organization members to achieve school goals (Hoy & Miskel, 2008). Personal philosophy and values turns into a theory-in-use (Argyris & Schon, 1978) expressing their personal philosophy and values. Considering this background, the aim of the present study was to explore the way personal epistemological beliefs, values, regularities, routines and practices that school principals undertake, in order to shape and strengthening school's internal coherence, intention to produce high levels of instructional practice reliably. The research question was: What are the personal epistemological beliefs, values, regularities, routines and practices that school principals undertake in order to produce high levels of instructional practice reliably, that shape and strengthening school's internal coherence?

Method

The present study employed a qualitative research methodology (Stake, 1994; Yin, 1994), to collect and analyze the beliefs, perceptions, assumptions, behaviors and actions of one Jewish elementary school leadership in the north of Israel. The study involved 31 teachers with an average age of 45 and an educational career ranging from four to 40 years. The sample was composed of one male and 30 female teachers. The principal was 51 years old, had an M.A degree and had been a principal for 9 years. In pursuit of answers to the research question, a school was selected using the inspector's recommendation, the school's achievement record and the principal's willingness to participate. Data was drawn from three whole-school staff meetings, three smaller staff meetings, four observations in class, 13 interviews with teachers holding middle-management roles (school experts' teacher), three focus groups, and analysis of approximately 35 documents and three in-depth interviews with teachers and principal, as well as close monitoring of the principal's daily work through shadowing, thereby drawing a rich picture of the everyday behaviors and actions of the principal, and validating the findings. The analysis of data followed the four stages described by Marshall and Rossman (1995, 87): 'organizing the data', 'generating categories, themes and patterns', 'testing any emergent hypothesis' and 'searching for alternative explanations'. This analysis aims at identifying central themes in the data and searching for recurrent experiences, feelings and attitudes, so as to be able to code, reduce and connect different categories into central themes. The coding was guided by the principles of 'comparative analysis' (Glaser & Strauss, 1967). It included the comparison of any coded element in terms of emergent categories and subcategories. The analysis was conducted by the author of this paper and validated by structured analysis and through peer review.

Findings

This section presents the major findings from the study. The principal's personal epistemological beliefs, values and practices which lead the school's pedagogical work are demonstrated. The finding demonstrated how beliefs and values are translated into routines, regularities and practices strengthening school's internal coherence that focused on improvement of teaching and learning.

Principal's personal epistemological beliefs, values and practices that lead the school's pedagogical work

The data analysis demonstrates that constant learning and improvement of teaching and learning are part of the principal's perception of her role and a central element in her daily work. She says:

The central axis of the school is the teaching-learning-assessment processes. They construct a learning climate...this is part of the school's central perception, it's the core of the school. Its aim is to raise the bar, to raise the level through teaching-learning-assessment processes.

The principal has a clear role perception: deciding on a direction, learning and implementation of central components in the process of leading the school, implementation of her beliefs and vision.

When I entered the job, ... I saw that school staff had received many tastes of teaching and learning methods, but there was no one to say: guys, this is the way, this is where we are going, this is what we are learning and this is what we are doing. Success is my ability as a principal, to lead towards those goals and aims, and actually implement the vision and the belief. Implement the dream...

The principal's beliefs are expressed in the school's vision called "Stepping Stones" for a school-wide educational action. The document defines clear base points for education action:

(1) Promotion of every learner's academic, personal and social achievement, while taking into account the differences among the learners. (2) Creation of a culture of learners [both teachers and students] who are self-directed within an inquiry-based, authentic, computer-directed environment. (3) Development of a social, value-based, community-centered atmosphere, incorporating all school populations. (4) Evaluation and feedback as part of school culture.

The principal's beliefs and perception of learning expressed in her words on the school site:

We knew we were aiming at the learners with the goal of promoting their achievements at the personal level, in the different subject matter areas, through teaching and learning in small groups, while carrying on an ongoing dialogue with the partners and developing independent, self-directed learners, aware of themselves and the process. We had to emphasize experiential teaching and learning and the implementation of thinking tools. We had to construct learning environments encouraging active, creative, challenging learning, suited to both individual and group work, and do all this while using constant, frequent planning, coordination, implementation, follow-up and inspection processes. Throughout the process we had ups and downs, opposition, learning and agreements. "Every man is both, a rabbi and a pupil, influencing and being influenced, giving and taking" (Rabbi Yosef Solovietchick). May we continue to rally our forces and direct ourselves towards implementation of the values and vision we believe in. May we succeed in raising the floor... and breaking through the ceiling... because I would like to remind you that for us the sky is the limit.

Principal's main practice towards assimilation of her epistemological beliefs

The data analysis shows that the principal uses two central leadership practices expressing her epistemological values. The first is forming a clear, defined direction for school-wide educational action focused on advancement of students and their achievement through learning and constant development of both teachers and students. This practice includes several sub-practices: (a) writing the "Stepping Stones" document defining both the 'what' –

and the ‘how’; (b) publishing it on the school site and in school documents; (c) reviewing the base points of educational action and the Stepping Stones document and their implementation in the annual orientation days, emphasizing the learning and development planned in these contexts for the year about to begin; (d) defining the central values leading the school-wide educational action. The second action includes motivating the teaching staff and the students to act through usage of positive, inspiring messages targeting their feelings. It includes the following sub-practices: (a) using a variety of positive, optimistic, stirring messages targeting teachers’ and students’ feelings, inspiring them and motivating them to act; (b) ensuring these messages are clearly displayed in public – on the school site, on school walls, in the Class Diaries, in the teacher’s kit given out in the pre-school year orientation days, in the students’ report cards, in the parents’ feedback questionnaires, etc.; (c) repeating these messages at every opportunity, in talks with teachers, students and parents. For example:

We create tomorrow with what we learn today; We did not say it is impossible, we created an island of possibility (Dewey); Educate the boy according to his way (Proverbs); Individuals don’t win, teams win (Sam Walton); Success is given to those who wake up from the dream and instead of beginning their daily routine begin to make the dream come true...

Messages create high motivation for learning and action among the teachers

The data analysis shows that these positive messages create high motivation among the teachers and a belief in their abilities to implement the school’s goals:

We were selected [to be an online learning demonstrating school] not because we are very big regarding online learning, and we have smart boards and we are great at constructing tasks. No, we were selected because we dare. We are willing to learn, to move forward. They saw the processes we went through and said: this is a school that can. We will give it the tools and it will break through. That’s the reason, so we are willing to learn, all of us. Once we are willing to learn, the sky is the limit. That is, we fly onwards (online learning coordinator).

Messages create high motivation for learning and action among the students

The data analysis shows that these messages filter down to the students and contribute to a positive perception of learning and self-efficacy. To the question what does this mean? “We did not say it is impossible, we created an island of possibility”. They explain:

There is a very clear message that we need to look for the positive and the possible and focus less on the negative. Everything is possible. There’s no such thing as I can’t, only I won’t. Some things are difficult for us and we give up, so we need to work harder and do them. Not give up easily. If you really want it you will succeed. If I got 60 in the test I can say it’s not the end of the world, I will work harder and succeed. Set up goals and succeed. There’s no such thing as impossible, don’t give in, believe in yourself.

School organizational routines and regularities focused on improve pedagogical work

The data analysis shows that the principal’s personal epistemological constructivist beliefs are translated into a clear set of daily managerial/organizational behaviors, practices focused on staff ongoing learning as well as students’ and a wide range of routines and regularities, from those aimed at establishing common working frameworks and preserving them through use of rules, regulations, standards and work norms, to those aimed at deepening and improving teaching and learning in the classroom. The data contain four groups of central routines and regularities led by the principal: (a) routines focused on systematic leading of different experts’ teacher in the school; (b) regularities focused on leading and improving teachers’

pedagogical work; (c) routines and regularities focused on promoting students; (d) routines and regularities dealing with monitoring, supervision and follow-up.

Routines and regularities focused on leading pedagogical work with experts' teacher

Data analysis points at the expectation from school experts' teacher to be 'self-starters', show commitment and carry the responsibility for leading pedagogical work in the school. In answer to the researcher's question – the vice principal explains how one reaches a situation where the teachers become 'self-starters', the vice-principal replied:

Once there is coordination of expectations, and during the school year you take regular breaks to assess the situation, it works ... as soon as there is coordination of expectations regarding what is expected of them, there's a work plan... which they constructed, they work according to the plan and there are points for stopping and assessing, what have we done so far, what else do we need to do? It works, it simply works, and they really are 'self-starters'...

Leadership/managerial practices setting up and implementing routines based on which experts' teacher school lead the pedagogical work side by side with the principal

The data analysis describes leadership practices setting up and implementing clear, defined routines based on which the school experts' teacher lead the pedagogical work side by side with the principal: (1) Identifying staff members who can lead pedagogical work in school; (2) Defining experts' teacher/dividing the staff into 'work teams'; (3) Coordinating expectations with each functionary/team, including definition of their role and its demands; (4) Demanding a work plan including an implementation schedule and assessment points throughout; (5) Demanding assessment, feedback and correction of the plan if and when necessary; (6) Demanding regular reports; (7) Monitoring and assessment of the plan and its implementation, and making changes if and when necessary; (8) The principal's self-assessment regarding the level of implementation of the school-wide work plan.

Regularities focused on leading and improving teachers' pedagogical work

The data analysis points at the principal's active involvement in the teachers' professional development through daily organizational routines and regularities. According to her perception, providing guidance and tools for pedagogical practice is one of her central roles. She says this is also a message to the teachers – the school makes sure you can carry out your job in the best way possible:

One of the principal's roles is not only to allow, but to make sure, there's a message here, it's very important. I make sure you have everything you need to carry this out, including pedagogical guidance, but also the tools, which is something very central. This is true all along the way... if you really want work, give them the tools...

Support of this perception and its implementation is provided by the 3rd grade homeroom teacher:

When the principal demands something, she provides us with all the tools to make it happen, I have to say this in her favor. She wants the school to be online, she will find all the resources in the world to give us all the tools, including in-service courses, including lap tops, including upgrading them, including their upkeep, including professionals, including...to support us...

According to the vice-principal, providing time slots in the schedule for planning and learning is a necessary condition for staff development and a message to the staff – continuous learning and that professional development are important, “it is a statement”.

... Providing time in the schedule for teachers’ practical training, providing time in the schedule for lesson modeling, sample modeling lessons... I’m sure that without these training hours, these meetings, it would not have happened. You can speak all you want in the general meeting, but once it comes down to the practical level and someone helps you and leads you and guides you, it will happen, it will take place... it just works...the school really provides us with the tools and the possibilities.

Routines and regularities focused on promoting students according to their varied needs

The principal’s epistemological constructivist beliefs serve as a basis for setting up routines and regularities focused on promoting students as well as other practices. She believes that meeting each student’s individual needs by professional teachers will allow them to reach better academic standards.

I always give this answer to anyone who asks, look at the teacher in class carrying out the beginning-of-year diagnosis, Moshe got 90 and Tzila got 60, naturally... who will she turn to first? Who will she pay attention to after her diagnosis... the 60 or the 90? She will naturally go to the 60... You first see what is needed to promote the weak student, because you feel the excellent student can manage without you, which isn’t true. Actually, by not dealing with the excellent student you create other reactions in him... frustration, boredom, and then... if we say “educate the boy according to his way”, then according to his ways means according to his ways,... Actually, to implement the school’s main agenda which is individualism [educate the boy according to his way]. We need to train the teacher to be able to provide this solution (principal).

The vice-principal and the 3rd grade homeroom teacher both support the principal’s perception. They add that work in small groups contributes to their feelings of success and satisfaction:

The small group allows us to provide solutions to children with emotional problems, children with attention deficit problems... and with emotional problems which you... need to make time for, or organizational problems... they need the small group, because in the small group... they have nowhere to escape to like in the large class (vice principal, 2nd interview). ...First of all, as I told you earlier, the school has an ‘individualism’ approach... as far as inclusion; we have a system no other school in Israel has. I don’t know any schools which provide Art Therapy and Dance Therapy. No one gives that. That’s something we only have here.... So the school does look at the individual, and does promote him/her, and you can see this not only regarding inclusion, it also promotes the intermediate students (2nd grade homeroom teacher).

Both the principal and the vice-principal point at a tapestry of organizational routines and regularities based on informed resource management and their maximal utilization for the purpose of student advancement. The data analysis shows that the school has four organizational regularities suited to the students’ needs: (a) Different Learning – under-achieving students. (b) Integration Program–weak students with special needs (integrated/diagnosed). (c) And (d) students with a high level of academic achievements and students with a very high level or excellent students.

The data analysis points at a central leadership/management practice: (1) Organization of school regularities focusing on student promotion so that they work in coordination with and support each other, based on a system-wide context-based view, focusing on student needs. (2) Consolidation of resources into a whole system of student assistance in the three core areas (Language, Math and English). (3) Planning and use of the hours/time resource from a system-wide point of view in order to advance students at the age level, class and group levels as well as the individual student level. (4) Focusing on classes with greater needs. (5) Concentrating individual teaching efforts in 1st and 2nd grade in Hebrew and Math, in order to prevent future gaps. (6) Managing human resources according to areas of expertise.

Routines and regularities dealing with monitoring and follow-up

The data analysis points at monitoring and follow-up routines the principal uses in order to ensure implementation of the school's vision and goals and preserve the quality and appropriateness of the work. These routines are part of her daily work. She works on the basis of the assumption that with no follow-up there is no change. She believes that follow-up motivates the staff to act. She says:

... this thing, where you think you can dictate something in the Staff Room, and you continue to sit in your room, because you think it's happening, no...

The vice principal supports the principal's words, claiming that monitoring the teachers' work is "the stepping stones which construct our success criterion", and "when the targeted results are defined and expectations are coordinated and results are assessed, there's no way it won't work":

...I believe that when there's coordination of expectations and things are placed on the table and things are clear and not vague... when things are clear one two three, we'll also check the one two three and get one two three, ...As soon as the staff is divided into work groups and there's coordination of expectations, there's a work plan, and there's examination of the work plan and assessment points later on, there's no way it won't work, no way. If at the first assessment point we see that something isn't working, we immediately change, immediately fix it and get back on track. These are the stepping stones which construct our criterion for success...

The findings point at several objects being monitored, for example school wide curriculum planning, planning of individual lessons, teacher presence in class, the number of online lessons, class exam reports, student achievements and absences. Moreover, the findings point at the provision of immediate feedback following this follow-up, for example a teacher is asked to come in for a meeting, email is sent, repeated requests to fulfill certain tasks. The results of the follow-up are expressed by the teachers:

We can't not do something or do it half way; I know there's someone who checks what I do; ...I can't do what I want, there's the framework. We have to meet the curriculum, there's this follow-up all the time, she is always follow-up, and again, this is constructive criticism, it makes me work.

To sum up, monitoring, and follow-up are an inseparable part of the principal's role perception and daily work routine. She views them as necessary conditions to ensuring implementation of the school's vision and goals and preserving the quality and appropriateness of the work. According to the vice principal "If she had not been consistent in

this, if she had not been involved with it, it wouldn't have happened". "What is important here in the school".

Discussion

The findings of the present study demonstrate how school principal produce high levels of instructional practice reliably by shaping and strengthening school's internal coherence.

The findings demonstrate that the principal holds progressive constructive epistemological beliefs leading and guiding her educational-pedagogical work. These beliefs are translated into school routines and regularities as well as daily management and leadership behaviors and practices, all aimed at achieving the focused goals of improving teaching and learning and promoting student achievement. This finding goes hand in hand with the findings that principals' personal epistemological beliefs guide their pedagogical behaviors and the daily practices through which they lead improvement of teaching and learning (Brownlee, Nailon & Tickle, 2010).

The principal believes that the teacher's pedagogical professionalism is an important, essential central component in promoting students and their achievements; that knowledge of teaching and learning is constructed by the staff; and that constant fostering of teaching and learning in school necessitates a professional pedagogical discourse regarding the planning, implementation and assessment of teaching, from a student-focused perspective. This finding matches the finding that encouragement and active participation in the teachers' learning and development is the strongest element affecting students' achievement (Robinson, Lloyd & Rowe, 2008). This belief is based on several basic assumptions: continuous deepening of teacher professionalism creates constant improvement of teaching and learning, thus contributing to the advancement of the students and their achievements. Collaborative planning, implementation and assessment of teaching create a school culture of constant learning and improvement of teaching and learning. Providing individual responses to students' needs by teachers trained how to do this, allow the students to reach a high level of academic achievement. The monitoring of teaching and learning processes is a necessary condition for ensuring the implementation of the school's vision and goals, as well as preserving the quality and appropriateness of the work, the school's effectiveness and the students' success. The monitoring activities achieve lasting improvement, as improvement is dependent upon the development of a diagnostic ability (Elmore, 2006), and due to the fact that diagnosis, problem identification, assistance in creating solutions and focusing resources are core elements of leadership and school management (Spillane & Coldren, 2011).

The findings of the present study demonstrate that (1) the principal's personal, educational epistemological beliefs dictate her behaviors through which she motivates the school staff in order to achieve her goals. These directly affect the school's goals, vision and tasks, as well as the teachers' epistemological beliefs and practices, which in turn affect student achievement. (2) Organizational routines and practices are a necessary condition for leading school-wide learning and improvement processes. (3) Central practices shared by the staff focus on teaching and the improvement of core achievements. (4) Monitoring activities ensure that decisions and regulations decided upon by the principal and the staff are followed through. These keep up high standards, positive work tension and appropriate conduct, which in turn ensure that the school meets the goals it had set. (5) Meaningful relationships and agreement among all these elements create an organizational 'glue' and school cohesion.

A clear conclusion is that the combination of these factors into one critical mass contributes to the success of the school. This finding follows other studies showing that most school variables, when presenting separately, have a minor influence on learning. Creating the combination and interdependence among the above-mentioned factors into a significant critical mass is one of the principal's most important roles (Fuhrman & Elmore, 2004).

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The effect of justice perceptions on academics' OCB: The mediating role of LMX

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Abstract

This study investigates the interplay among organizational justice, organizational culture, LMX and OCB, claiming that LMX play a definite role in the relationship between the other two. As Turkish universities have modelled themselves on two different traditions, the predominant organizational cultures' impact on the work attitudes in these two settings also needs to be taken into account. The sample is formed of faculty members in Istanbul. A mixed method approach is used to verify the findings obtained through questionnaires with semi-structured interviews. The quantitative and qualitative findings support and complement each other largely, revealing that organizational culture plays a significant role in perceived justice – OCB relationship and the mediating role of LMX also depends on organizational culture.

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Introduction

As an emerging market economy Turkey has been emphasizing university education to support its high growth trajectory. Partly due to this and the ever increasing demand for education, there has been need for expansion in the country's university sector. As a consequence, a rapid increase in the numbers of universities from 19 in 1981 to 179 by 2012 has been realized. Demand for faculty members has shown a similar increase, and yet educating academics who are equally capable in education, research and service to society has been troubled, to say the least. The preparation period to become an academician, which was once mostly shaped by a mentor-mentee type of relationship, began to be replaced with an approach of generating as many as possible in the shortest time possible. The president of the Council of Higher Education of Turkey declared repeatedly that the number of people who should earn doctoral degrees needs to triple from 40,000 a year, to 120,000 a year mark. Yet securing discretionary behavior, in the form of helping, altruism and sportsmanship among academics, could be argued to be much less observed compared with the past.

In this context, it may be an oversight to not to take the imprinting effect of the major stands of organizational culture that exists in the Turkish universities. The two main undercurrents were the Continental European and the North American traditions both of which had their own share in the shaping of Turkish universities -at least during their foundation. The former operated with a more classic-technical approach derived from Continental Europe and the education is held mainly in Turkish. The latter universities adopted mostly the USA's institutions due to isomorphic pressures and in these mostly social sciences-engineering dominated universities the language of instruction is English (Usdiken, Topaler and Kocak, 2013). There has been a research strand (see Cohen-Charash and Spector, 2001) showing the strong impact of organizational justice dimensions on organizational citizenship behavior (OCB). A more recent but integrative theory (Walumbwa, Cropanzano and Goldman, 2011) argued that leader-member exchange (LMX) is a stronger predictor of discretionary behavior and other important organizational outcomes. Although organizational justice has, traditionally, been regarded as a predominantly influential construct on OCB, this link has

lately been found to be mediated by the quality of employee-supervisor relationship (Karriker and Williams, 2009). Recent research continues to provide support to the idea that employees' perceptions about how fairly they have been treated by managers and the quality of the work relationship between the manager and the employee are substantially related (e.g., Erdogan, Liden and Kraimer, 2006; Walumba et al., 2011,) and they jointly increase the likelihood of the occurrence of OCB (e.g., Lee et al., 2010).

However, how social and economic exchange dimensions at the work place affects the relationship between manager and employee, as well as what repercussions these have on propensity to engage in OCB needs to be more closely investigated. Although the correlational OCB and organizational justice research continues to expand, as Greenberg (1993) suggested some time ago, these studies need to be supplemented by open-ended interview studies as well as laboratory investigations. Considering the multidimensional and often personal nature of the tendency to engage in OCBs, justice perceptions and LMX in diverse work settings, this advice may be well-placed. Thus, in this study, we have set out to investigate the effects of justice perceptions and relationships' of academics with their supervisors, on OCB, taking also into account the role different organizational cultures in these universities may play.

Organizational Citizenship Behavior

The OCB construct as a whole is based on theories such as social exchange theory, norm of reciprocity, equity theory, social learning theory, social information processing theory, and LMX theory (Organ et al., 2006). There was no largely agreed upon conceptualization on this construct, until it was defined in 1988 as: "individual behavior that is discretionary, not directly or explicitly recognized by the formal reward system and that in the aggregate promotes the effective functioning of the organization" (Organ et al., 2006, 3). Whereas the five factor model of OCB developed includes altruism, sportsmanship, civic virtue, courtesy and conscientiousness dimensions, in a more recent formulation (e.g., Podsakoff, et al., 2000), helping behavior, civic virtue and sportsmanship emerge to cover all other factors. Results from diverse settings show that even though all dimensions of OCB do not seem to be significant in every context, in aggregate, a good citizenship behavior has crucial impacts on operations and effectiveness (Cropanzano and Mitchell, 2005; Wat and Schaffer, 2005; Zellars and Tepper, 2003).

As the OCB often emerges to be an organizationally valuable discretionary behavior in diverse settings (Cohen-Charash and Spector, 2001), it is no coincidence that numerous studies were conducted to find out OCB's impact on employees' attitudes, behavior and especially on performance. Despite the increasing number of studies, recently Podsakoff and his colleagues (2000) argued that the literature has mostly dealt with the relationship of OCB with other constructs without examining the "nature" of this behavior. This is partly because, although there have been numerous attempts to quantify the construct, qualitative investigations which could decipher the width and breath of the topic is relatively scarce. The difficulties in building up a generalized model for OCB may be emerging, at least partially, from not putting its personal and cultural aspects into perspective. That both individual-based dimensions (Koberg, Boss, Goodman, Boss and Monsen, 2005) and organizational culture are both found to have substantial influence on OCB (Erdogan et al., 2006), seem to support this claim. Thus, this study aims to fill this void by taking into account the role organizational culture may play on OCB. Next two sections focus on organizational justice and LMX as the latter is included in this study as a mediator between the former and the OCB.

Organizational Justice

Organizational justice has been a popular research topic for many management academics to understand organizational behavior in an increasingly diverse work environment. Organizations portray an image of attributing importance to fairness because it brings about positive behaviors in the organization and helps employees feel that they are respected parts of the company. An unfair atmosphere, on the other hand, is likely to trigger improper actions as well as deviant behavior and thus affects organizational goal attainment negatively (Beugre, 2002; Folger and Bies, 1989). With a more or less general consensus, organizational justice is agreed to consist of distributive, procedural and interactional dimensions and if all of these dimensions could be balanced in an organization, high quality justice perceptions are expected to emerge among employees (Tekleab, Takeuchi and Taylor 2005).

Distributive justice is composed of allocation of tangible or/and intangible rewards showing great concern for fairness perception of employees. Extra-role behavior that is discretionary, or that is not an enforceable requirement of job description, was related to Adams' equity theory and Blau's famous distinction between economic and social exchange (Niehoff and Moorman, 1993; Organ et al., 2006). Adams' early work on evaluating organization's fairness perceptions is based on the comparison employees make about their own and others' input outcome ratios. As such, equity theory mainly takes into account the distributive justice dimension, and proposes that perceptions of an uneven distribution of work related rewards will create a tension that the individual will want to even out. Because OCB could be regarded as an input, it is likely that an employee who perceives such inconsistency will have a reduced tendency to show extra-role behavior (Bolat, 2010). On the other hand, procedural justice dimension deals with the fairness of the decisions and the procedures used to determine work-place outcomes. When an organization makes decisions by using similar criteria for all employees, employees are likely to have positive perceptions of procedural justice. It is a manager's responsibility to achieve procedural justice in the minds of the employees (Folger and Bies, 1989). Finally, the process of how a manager treats an employee is as important as much as how much equally s/he is treated. Interactional justice is argued to be composed of two subcomponents (Greenberg, 1993; Lee et al. 2010), namely interpersonal and informational justice. The former indicates the extent to which employees are treated within the frame of respect and dignity by the authorities who are in charge of distributive outcomes whereas the latter regards whether employees are provided with sufficient information. On the whole, interactional justice emerges from employee's perception of how the management is behaving them.

There are many findings about the influence of organizational justice over OCB and its dimensions (e.g. Cohen-Charash and Spector, 2001; Niehoff and Moorman, 1993). Thus, it would not be a mistake to claim that employees at all levels would be willing to go beyond their formal work definition and engage in extra role behaviors only when they perceive to be fairly treated. As employees' justice perceptions can be related to the attitudes and behaviors of the leader (Erdogan et al., 2006), LMX should also be taken into account in the analysis of the relationship between organizational justice and OCB.

Leader Member Exchange

Leader-member exchange theory is based on the relationship as well as the trust level between a manager and employees in an organization (Brower, Schoorman and Tan, 2000). According to the LMX theory, because of limited time, energy, and resources, supervisors use different leadership styles toward their subordinates and develop different social or economic exchange relationships with them. In other words, a supervisor with ten subordinates may have up to ten

different interactions with these subordinates (Bauer and Green, 1996). Thus, the theory tries to determine how supervisors use their power and organizational resources to develop different exchange relationships with their subordinates.

Group members who enjoy high interaction with the leader are designated as in-group members; they get a preferential treatment and are expected to be more loyal than the others. On the other hand, those who have low interaction with the leader are called as out-group members, and may think that they are unfairly treated, as in-group members receive more attention and positive rewards in comparison to them. Out-group members are expected to be more responsive to economic exchange than social exchange side of the work relationship (Bolat, 2010; Walumba et al., 2011). Lee et al. (2010) found that subordinates in a high supervisor-subordinate relationship perceive greater distributive and procedural justice. Cohen-Charash and Spector (2001) found clear links between leader-member exchange and distributive, procedural, and interactional justice perceptions. Imer (2009) reached similar conclusions with Turkish respondents and Erturk (2007) found that trust in supervisor was a mediating factor for the Turkish academics employed by the state universities. Considering that trust is one of the key determinants in LMX and organizational justice relationship, it is likely that this link will be important on the propensity to engage in OCB for the same group. Thus, distributive, procedural and interactional justice are all likely to be related to the quality of LMX.

Methodology

Sample and the Procedure

In this study, mixed method (Creswell and Plano-Clark, 2007) was employed for data triangulation purposes. In doing so, we could verify the results obtained through questionnaires with data obtained in interviews with academics. For the questionnaire administration, full time members in the' economics and administrative sciences faculties of universities in Istanbul were targeted to achieve some level of uniformity. There are 33 universities located in Istanbul metropolitan area, but as the rest were at relatively early phases of their foundation only 27 of them were included in the present investigation. The faculty members of all 27 universities were approached first via e-mails sent to all full time faculty members, inviting them complete the questionnaire. The questionnaires were either left to the postboxes with a self-seal envelop or if they choose to academics could fill the questionnaire on-line. In total, 218 answered questionnaires were attained from 17 universities. After a screening, 203 questionnaires were found usable as they were completed by the targeted group. For the purposes of the study, the data was categorized according the type of the university it originated. The break-down according to classical-technical versus social sciences-engineering universities showed that the questionnaires from the former added up to 100, and the latter to 103.

For the measurement of organizational justice perceptions, the scale developed by Colquitt (2001) is employed. The scale uses Likert scale responses to indicate degree of organizational justice and explores procedural justice (seven items), distributive justice (four items), interpersonal justice (four items), and informational justice (five items). The LMX7 scale by Tekleab and Taylor (2003) is employed in the present investigation and consists of seven items. Reliability and validity of the scales were tested with a pilot study, and majority of the scales were found fit for the main study. There were less than desired internal reliability scores in some of the OCB components and that was taken as a cautionary note for the latter phase of the study. Based on aforementioned studies, we have measured OCB as a single

construct with Organ and colleagues' (2006) scale. Response options for all scales are delivered on a Likert scale with possible responses ranging from 1 (strongly disagree) to 5 (strongly agree), with higher scores indicating a higher level of the measured variable. The Cronbach's Alpha scores range between .78 and .95 and thus the internal reliabilities of the scales were deemed satisfactory (see Table 1).

Table 1. Means and correlations among the study variables

	Av. (S.D.)	1	2	3	4	5	6	7	8
1. Age	41.1 (9.1)								
2. Monthly income	2.7 (1.4)	.388 ^{***}							
3. Distributive Justice	12.8 (3.8)	.219 ^{**}	.162 [*]	(.91)					
4. Procedural Justice	20.2 (6.7)	.150 [*]	.243 ^{***}	.573 ^{***}	(.91)				
5. Interpersonal Justice	16.7 (3.6)	.090	.244 ^{***}	.480 ^{***}	.602 ^{***}	(.95)			
6. Informational Justice	17.9 (5.4)	-.021	.149 [*]	.489 ^{***}	.679 ^{***}	.772 ^{***}	(.95)		
7. LMX	22.3 (5.4)	-.057	.150 [*]	.406 ^{***}	.625 ^{***}	.632 ^{***}	.776 ^{***}	(.82)	
8. OCB	88.9 (9.0)	-.170 [*]	-.160 [*]	-.132 [#]	-.046	-.019	.016	.195 ^{**}	(.78)

Note: [#]Correlations statistically significant at .10 level. ^{*}Correlations significant at .05 level. ^{**}Correlations significant at .01 level. ^{***}Correlations significant at .001 level. Figures in parentheses are Alpha reliabilities.

Qualitative Study

In the subsequent part of the study, academics were selected judgmentally for the interview to achieve a balance between males, females, public and private universities, and among academic titles to attain a representative group of informants. In order to gain further insight on the key variables of the study, an interview protocol composed of 13 questions was prepared. The protocol probed interviewee's perceptions of three different types of justice and their impact on academic staff at their respective universities, LMX and OCB. The interview had a semi-structured design leaving room for the interviewees to discuss the concept of justice in academic context, to tell anecdotes about unjust behaviors and their impact on organizational climate as well as the positions of their universities vis-a-vis others they know of, to talk about existence and transparency of performance management system in their departments, to discuss their perceptions of existence, extent and character of LMX in academia, and to name determinants and examples of commonly seen OCB.

Results and Discussion

Quantitative Analyses

In determining academics' likelihood of engaging in OCB, first Pearson correlations among all study variables were obtained (see Table 1). This analysis on the whole data revealed that with the exception of modest correlation of distributive justice (<.10), the remaining organizational justice dimensions were not correlated with OCB (>.05). The respondents' age and monthly net income were modestly but negatively correlated with OCB (<.05). Among the study variables, the only variable that has emerged as a potent variable for explaining OCB was LMX (p<.01). An initial multiple regression analysis on the whole data set with all study variables showed that LMX and university type were both significant predictors for OCB (<.001), but the rest were not.

In accordance with the main aim of the study, potential moderation effect of university type and mediation effect of LMX was decided to be investigated further. For this purpose, the

data was split according to the university type, and two separate multiple regressions were conducted. The regressions were conducted in hierarchical format, where with the exception of LMX all study variables were entered to the analysis first, and after this initial step LMX was entered independently to see whether the variable has a distinct effect on the perceptions of the respondents. For the faculty members of classical-technical universities, age of the respondent was the single predictor for the tendency in engaging in OCB (Beta=-.468, $p<.01$). When LMX was entered to the analysis, it contributed modestly to the prediction (Beta=.288, $p<.10$) and only slightly mediated the effect of age (Beta=-.462, $p<.01$). On the other hand, for this same group of respondents, none of the justice dimensions showed any significant effect ($p<.10$). We have concluded that the older the respondent is, the less likely it became to engage in OCB. Moreover, the immediate academic supervisors' power to get anyone involved in OCB is very little for this group of respondents. Finally, the respondents have reported no solid relationship between justice dimensions and helping others or altruistic behaviors (see Table 2: the middle column).

Table 2. The regression models for the two types of Universities

<i>Independent Variables</i>	<i>Classic-technical (n₁=100)</i>	<i>Social science-engineering (n₂=103)</i>
<i>Gender</i>	.116	-.031
<i>Age</i>	-.462***	.039
<i>Monthly net income</i>	.190	-.049
<i>Distributive Justice</i>	.012	-.248#
<i>Procedural Justice</i>	.144	.091
<i>Interpersonal Justice</i>	-.195	.186
<i>Informational Justice</i>	.028	-.544**
<i>LMX</i>	.288#	.615***
<i>R² of the Model</i>	.23**	.20*

Note: All regression coefficients are standardized. The coefficients marked were statistically significant at (***) .001, (**) .01, (*) .05 and (#) .10 levels.

For the faculty members of the second type, i.e. social sciences-engineering dominant universities, the story was quite different (see Table 2: the last column). In this case, LMX was a potent predictor for OCB (Beta=.615, $p<.001$), with informational ($p<.01$) and distributive justice dimensions ($p<.10$) following it. Interestingly, both informational (Beta=-.544, $p<.01$) and distributive (Beta=-.248, $p<.10$) justice contributed with a negative effect. These results could be attributed to LMX's in-group, out-group membership distinction. In a nut-shell, those social sciences-engineering university respondents, who perceived informational and distributive justice in their institution, did not feel compelled to engage in OCB. However, when LMX is perceived as a critical resource by the respondents, and they felt that access to informational flow as well as getting better share of the tangible or/and intangible rewards depend on the relationship with the immediate academic supervisor, the respondents were found to be more willing to take part in helping in others.

Qualitative Findings

The conducted interviews confirmed that the differences were highly pronounced between the different academic traditions the universities were founded upon. For instance, the interviewees in the social sciences-engineering universities confirmed that their perception regarding the immediate academic supervisor's fairness in handling procedures, sharing information, allocating tasks, etc. was very important in their willingness to engage in discretionary behavior not directly listed in their contracts. Significance of transparency in social sciences-engineering universities was emphasized by one of the interviewees as follows:

We make lists with our coordinator regarding the division of labor. Then these lists are shared so that we know what the others do. I feel better when I see that others are given similar amounts of tasks.

While most interviewees from social-sciences-engineering universities could not think of significant cases of unjust behavior, the classical-technical university interviewees seem to have accepted unfair practices as given. In two universities with social sciences-engineering underpinnings, we have obtained answers like:

Let me think... but I cannot think of any significant case of injustice that cannot be compensated.

As far as distribution of research budgets, accommodation to faculty members ... implementation of policies and procedures for going to conferences and taking sabbaticals, our department fares quite well.

In contrast, in two classic-technical universities, the following answers were obtained:

Unjust practices have been persistent here. It is not much different today than it was in the past.

I do think that there are problems. However, because universities are not like private corporations, I think it is impossible to find a solution. ...I have accepted it and I do not call it injustice anymore. Everyone is treated in the same way.

The effects of relationship with immediate supervisor varied quite strongly between reports of the interviewees of the two types of universities. For example, an associate professor from a classic-technical university describes his relationship with his supervisor as follows:

He is like an older brother or a father for me. He would help me even with my personal problems.

An assistant professor from another classic-technical university described the department head as an elder sister who takes care of him when he acts against departmental norms. A more junior member from a classical-technical university mentions that:

We are like a family in our department. We socialize together with our families. For example, when one of us gets married or has a baby, we all go together. Thus, our relationship with our Professor (implying the supervisor) is very good.

Leader perceptions of the interviewed academics from the social sciences-engineering universities were vaguer; they could hardly specify someone as a leader.

I have a good relationship with the supervisors. Department chair, dean, whoever you mean.

...when he is asked of the nature of his relationship with his immediate supervisor.

We work like a team and department head assumes a more administrative role. I perceive her as a colleague.

It was also suggested that the organizational climate is strongly influenced by the immediate supervisor and the resulting OCB levels are closely connected in the classical-technical universities. An associate professor declared:

When I had good relations with my supervisor, I volunteered more for doing extra work for the department. Because my relation with the new supervisor is not so good, I withdrew myself. If I again have good relationships with a new supervisor, my willingness to contribute more to the department would again increase.

An assistant professor in another classical-technical university said:

Relationship is of course important in OCB. Poor relations with the department chair may decrease the willingness to assume extra work in even those who would otherwise contribute.

On the other hand, when a faculty member in a social sciences-engineering university, was asked her opinion about justice and OCB declared:

If I think that the leader is acting unfairly, my willingness to contribute will surely decrease. Courtesy of the leader, how just he manages and how well he does his job may all influence my extra-role behavior.

Conclusions

In this research, we have investigated the impacts of four organizational justice dimensions and the effect of immediate supervisors, i.e. LMX on Turkish academics' tendency to show OCB, in two distinct groups of university settings. Overall, the findings illustrate that there is a clear discrepancy between the two types of universities faculty members' perceptions of how fair they are treated by the managerial ranks in their institutions. This perception in turn has its impact on willingness to engage in discretionary helping behavior and sportsmanship in the work place. The mediating effect of LMX in the social sciences-engineering universities has emerged convincingly in our findings. In contrast, the influence of the immediate supervisor was rather low, or better put existed only on those younger academics. In the classic-technical universities, there was more of an atmosphere in which the immediate supervisor was portrayed as an elder family member. On the other hand, in the social sciences-engineering universities that sort of an environment was either absent, or it did not have any relevance to justice and OCB in the eyes of the interviewees from these universities. These findings are consistent with the research revealing highly group and family collectivistic, then again moderately institutionally collectivistic cultural background of the country (Kabasakal and Bodur, 2002). Our research shows that an administrative approach of the university officials as well as the informational justice in the social sciences-engineering universities could be extremely influential in academics' willingness to show helping behaviors and sportsmanship to others working in the same environment. In the classical-technical universities however more creative solutions needs to be devised to promote OCB. These results could be helpful for university administrators, who are in search of promoting OCB among the academics in their departments or faculties.

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Towards a culturally appropriate measure of leadership: Leadership effectiveness in Africa and the African diaspora (LEAD)

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Abstract

The purpose of the Leadership Effectiveness in Africa and the African Diaspora (LEAD) research is to develop a culturally sensitive measure of leadership. There is little research on leadership in Africa and even fewer studies on the African Diaspora. Factor analyses of culturally specific leadership dimensions for Africa and its Diaspora found that the items grouped into 15 factors explained 74% of the variance in leadership effectiveness. Issues such as being a big man, religion and spirituality, and *ubuntu* need to be considered in addition to servant and transformational leadership when discussing effective leadership in African countries and its Diaspora. The questionnaire can be used in African countries as well as with the African Diaspora to assist leaders in business, non-governmental organizations (NGOs) and government on how to lead effectively in Africa and the Diaspora.

Introduction

Over the past twenty years, a number of management scholars have pointed to the fact that management knowledge is severely biased towards “western” perspectives (Baruch, 2001; Bruton, 2010; Thomas, 1996; Werner, 2002). “At a fundamental level, literature on leadership has mainly been driven from and representing primarily Western cultural assumptions” (Elsaid & Elsaid, 2012). According to Den Hartog (1999), “the evaluation and meaning of many leader behaviors and characteristics may also strongly vary in different cultures and ... the perception of effective leadership is [so] highly influenced by culture”. Hofstede (1993, p.81) states: “In a global perspective, US management theories contain a number of idiosyncrasies not necessarily shared by management elsewhere”. It therefore becomes imperative that any management research should encompass countries from around the world, in particular, those under-researched areas like Africa and the African diaspora. We define African Diaspora as people with roots from Africa.

The purpose of the Leadership Effectiveness in Africa and the African Diaspora (LEAD) research is to develop a culturally sensitive measure of effective leadership. Based on previous emic research, culturally specific dimensions of leadership appropriate for Africa and the African Diaspora are developed. There is little research on leadership effectiveness in Africa or with members of the African Diaspora. Issues such as being a big man, religion and spirituality, and *ubuntu* need to be considered when discussing effective leadership in African countries. The questionnaire can be used in African countries as well as with the African

Diaspora around the world. Results of the survey can be used to assist leaders in business, NGOs and government on how to lead effectively in Africa and its Diaspora.

According to Den Hartog et al. (1999), “since implicit leadership theory, with its core construct of “leadership prototype”, has been found to be useful in understanding leader behavior in the United States, there seems no reason why this would not also be found in other countries”. Implicit leadership theory explains that prototypes of effective leadership are highly influenced by culture and ideal leadership behaviors are strongly related to cultural values. Since cultural conceptions of what makes a good leader differ so widely among Western cultures; some requiring strong characters and others a more democratic approach; then it is suggested that Western theories cannot reasonably be expected to explain the peculiarities of African culture. In fact, several researchers (e.g. Blunt & Jones, 1992); Littrel, Wu, Nkomo, Wanasika, Howell & Dorfman, 2013)) have all questioned the effectiveness of Western management and practices being used in Africa. Below, the literature on leadership in Africa is discussed.

Leadership in Africa

In the areas of management and international business, Africa still remains relatively under-researched; thus the scope that exists for such work is vast (Kamoche, 2011; Nkomo, 2011). In fact, only a few studies have looked at the impact of culture on management in the African context (Ford, Lituchy & Punnett, 2013; Jackson, 2013; Lituchy *et al.*, 2009; Littrel, 2013; Zoogah & Nkomo, 2013) and on African concepts. It is of note that most of this research pertains to South Africa and therefore only scratches the surface of African leadership leaving the need to develop a unified theory (Lituchy et al., 2009).

The “Big Man” concept is multifaceted. The themes of spiritualism, ancestral ties and humanism and collectivism pervade analyses by Smith (2002) and Wong and Davey (2007). James (2008) described the traditional concept of leadership in Africa as encompassing the “big man” who is all-powerful, fearsome, all knowing, and a multifaceted problem solver who is infallible. Daloz (2003) reported that social reputation is the genesis as each “Big Man” is a “self-made leader on some level, while (Médard, 1992; McCauley, 2013) explained that kinship ties and generosity (the exchange of resources for loyalty) are used to build allegiance and increase followership.

Researchers have begun to further explore the importance of *ubuntu* in leadership contexts (e.g. Muchiri, 2011; Sigger, Polak, & Pennink, 2010). Mbigi (1995) explains the relevance of *ubuntu* in African management and empowerment through the concept of the African Tree, “the branches of which are formed by leadership legitimacy, communal enterprise and value sharing...these values help to establish an enabling organisational structure and the skills and competencies valued in organisation’s leaders” (Van der Colff, 2003, p.258). According to Ncube (2010) and Wanasika et al. (2011), this philosophy, which pervades Southern and Eastern Africa, embodies a humanistic approach to management in Africa which focuses on respect, human dignity, compassion, relationship building, personal interaction and cultivating innovation. Brubaker (2013) states that given its pervasiveness in Africa, the implications of *ubuntu* for leader effectiveness would have great influence on the phenomenon throughout the continent. The emergence of *ubuntu* as a leadership philosophy is not meant to replace Western leadership philosophies but to add to the diversity and richness of the discourse and “allows for more inclusive discourse on leadership, incorporating other traditions that have been marginalized” (Ncube, 2010, p.81).

Method

Participants

Barbados. The Barbados data was composed of 56 respondents, with mean age of 30.17 ($SD = 10.65$); 67.9% were female. All of the participants in the sample were born in Barbados and 66.1% ($n = 38$) of the sample was employed.

Africa/Canada. The Canadian/African sample was composed of 164 respondents, with mean age of 27.86 ($SD = 9.49$); in terms of gender the sample was fairly evenly split with 50.6% being female. The sample was composed of participants from Canada (38.4%), Ghana (23.2%), Uganda (10.4%), Kenya (7.3%), China (4.9%), and small numbers of other countries (10.9%). Their average number of years in the work force was 7.37 ($SD = 6.55$), and 43.3% ($n = 71$) of the sample currently had a supervisory role at their job.

Measures

Barbados. The survey that was used in Barbados was composed of the full measures of: the leader empowering behaviour questionnaire (LEBQ) (Konczak, Stelly, & Trusty, 2000), Page and Wong's servant leadership scale (2000), and Podsakoff, MacKenzie, Moorman, and Fetter's (1990) transformational leadership scale.

Africa/Canada. The survey used for Canada and Africa is composed of items from the above measures. It also includes 45 leadership items newly created based on the previous research results. These items were selected in order to compose 35 leadership constructs that emerged in the previous data analyses.

Procedure

Barbados. Caribbean data collection occurred first. Management professors asked the students in their classes if they would be willing to fill out a pen and paper survey. When the students returned the surveys they were transcribed, cleaned and reliability checked followed by a confirmatory factor analysis which was run to see whether the western developed measures were applicable in a Caribbean population.

Africa/Canada. Based on these results and earlier qualitative research conducted concurrently the survey for the Canada and Africa were created. The survey was either online hosted on the Qualtrics software, or was given out in a pen and paper form. Management students who signed up for their universities participant pool were invited to take part in the study and sent the link to the web address where the study was hosted, or students in management classes were asked whether they would be willing to fill out a survey and were given pen and paper versions of the questionnaire. The data was either downloaded or transcribed from pen and paper questionnaires, cleaned and an exploratory factor analysis run on the data to see whether the leadership constructs included in the survey could be further reduced or combined in order to further refine the LEAD measure.

Results

Barbados

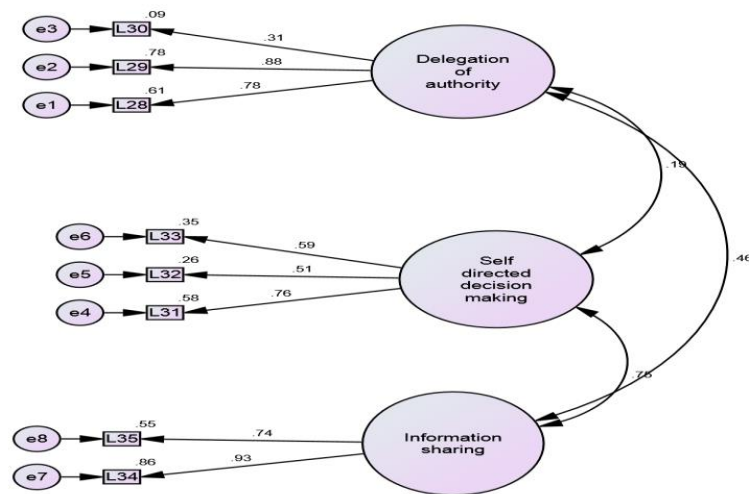
Following data cleaning, reverse coding and the creation of measure scores, the inter-item reliability for all scales and sub-scales were calculated. All scales and subscales reached the Cronbach's Alpha threshold of .70, as can be seen in Table 1, except for the LEBQ subscale of "Delegation of authority" ($\alpha = .66$), however, it was deemed to be close enough to the threshold and it was included in further analysis.

Table 1. Barbados study scale and sub-scale reliability

Scale	N of items	N of participants	Cronbach's alpha
LEBQ	8	55	.72
LEBQ: Delegation of authority	3	55	.66
LEBQ: Self-directed decision making	3	56	.86
LEBQ: Information sharing	2	56	.82
Servant Leader	23	48	.94
Servant: Empowerment	10	52	.80
Servant: Service	5	53	.85
Servant: Vision	8	53	.91
Transformational Leader	22	52	.98
Transformational: Articulates a vision	5	56	.95
Transformational: Provides an appropriate model	2	54	.93
Transformational: Fosters acceptance of goals	4	54	.97
Transformational: High performance expectations	3	54	.83
Transformational: Individual support	4	55	.87
Transformational: Intellectually stimulating	4	55	.95

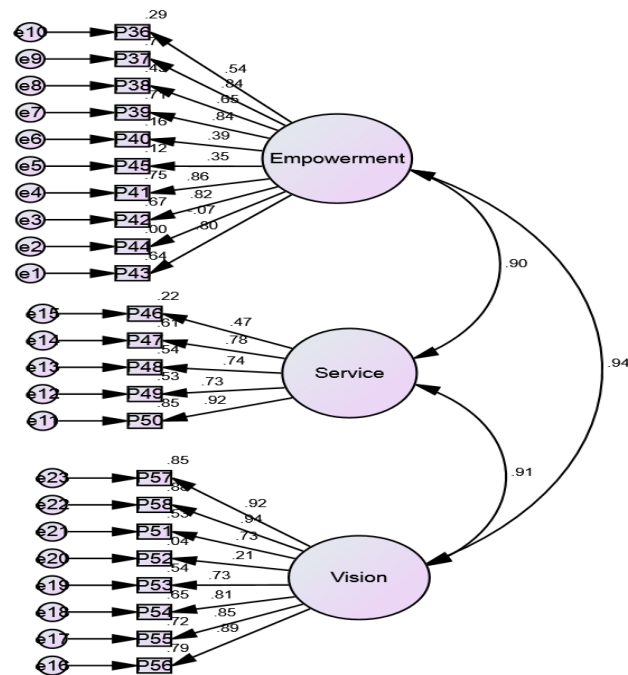
Following this in order to confirm whether the structure of the three pre-existing leadership scales hold true in the Caribbean sample, confirmatory factor analysis was run on each scale using the SPSS module, AMOS. See Figure 1.

Figure 1. LEBQ measure structure



The fit indexes for the LEBQ measure structure were as follows ($\chi^2 (17) = 28.85, p < .05$); RMSEA = .11; NFI = .82; CFI = .91; IFI = .80, and PNFI = .43, and can be found in Figure 2 and Table 2.

Figure 2. Page and Wong's Servant Leader Measure Structure



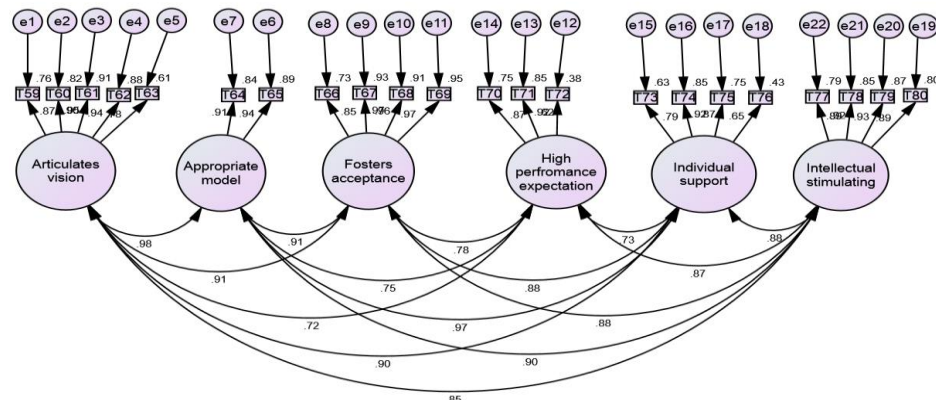
The fit indexes for Page and Wong's Servant Leader Measure were as follows (χ^2 (227) = 485.65, $p < .01$); RMSEA = .14; NFI = .64; CFI = .76; IFI = .77, and PNFI = .52, and can be found in Table 2.

Table 2. Barbados Study Goodness-of-Fit Indicators

Model	χ^2	Df	χ^2/df	p	RMSEA	NFI	CFI	IFI	PNFI
LEBQ	28.85	17	1.70	.04	.11	.82	.91	.92	.39
Servant Leader	485.6	227	2.14	.00	.14	.64	.76	.77	.52
Trans Leader	468.6	194	2.42	.00	.16	.76	.84	.85	.58

The fit indexes for transformational leader (Figure 3) were as follows (χ^2 (194) = 468.69, $p < .01$); RMSEA = .16; NFI = .76; CFI = .84; IFI = .85, and PNFI = .58, and can be found in Table 2. What can be drawn from the three confirmatory factor analyses is that the models are very close to holding true in the Caribbean sample, however they just barely reach the level of significance, which indicates that leadership in the Caribbean is similar to that of North America, however, there is a small enough difference that warrants further investigation and possibly the creation of a dedicated African diaspora and African leadership measure.

Figure 3. Transformational Leader Measure Structure



Canada and Africa

Data cleaning and reverse coding of certain items was completed upon the data. Though the sample size was on the low side the Kaiser-Meyer-Olkin measure of sampling adequacy test that was run resulted in a .87, which is well above the recommended .60 level, and the Bartlett's test of sphericity was significant as well (χ^2 (2016) = 7377.54, $p < .01$) both of which can be seen in Table 3.

Table 3. Africa/Canada acceptability of factor analysis statistics

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.87
Bartlett's Test of Sphericity	Chi-Square	7377.54
	Df	2016
	Sig.	.01

A principal component analysis was run with a varimax rotation. Based on the screen plot leveling off around 15 factors, and factors 16 upwards only explaining 1.5% of variance or less; 15 factors were selected, which combined explained 73.82% of the variance. Factor 1 was by far the largest explaining 34.91% of the variance, followed by factor 2 (7.37%) and factor 3 (4.76%).

Discussion

This paper presents the second phase in developing a culturally sensitive measure of effective leadership in Africa and in the African Diaspora. Based on Delphi Technique and Focus Groups conducted in Africa and with members of the Diaspora, a survey appropriate to the African and African Diaspora cultures was developed. Where available, existing measures of leadership were used and tested for reliability and validity in Barbados. These included empowerment, servant leadership and transformational leadership. Additional items were developed and tested in Canada and Africa leading to 15 factors including being a big man, religion and spirituality and ubuntu that are not included in Western measures of leadership. We now have a better understanding of the constructs that may be culturally appropriate for Africa and the African Diaspora. Future research will include refinement of this scale, and looking at antecedents and consequences of effective leadership.

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The effects of teamwork quality on team objective and subjective outcomes

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Abstract

The purpose of this study was to examine the effects of teamwork quality on major team outcomes that include team performance which is an objective outcome, and work satisfaction, learning, and motivation to increase the contribution to the team, which are subjective outcomes. The study suggested a causal model which is tested empirically. The sample size was 168 teams with 5-7 members per team. The study included several data sources. The proposed model was tested using structural equation modeling. The results show that teamwork quality has positive effects on the subjective outcomes: work satisfaction, learning, and team members' contribution. However, the direct effect of teamwork quality on team performance is negative. Quality teamwork leads to team high performance only through personal outcomes of the team members, especially through work satisfaction that has the major effect on team performance.

Introduction

The theme of quality collaborations in work teams, is gaining increasing attention in the academic literature in the last decades (Hoegl and Gemuenden, 2001; Hoegl and Parboteeah, 2004; 2006; Hoegl and Proserpio, 2004; Hoegl and Parboteeah, 2008; 2009; Dayan and Di Benedetto, 2009). Its importance to research and practice has been accelerated, since work teams are gaining increasing acceptance as a key factor in projects success (Hoegl, Parboteeah and Gemuenden 2003; Hoegl and Parboteeah, 2009). The participative management style of teamwork is becoming quite popular (Cook and Goff, 2002; Elloy, 2008). Companies are creatively creating work teams and sometimes even using their own resources, in order to shape quality work teams, rapidly respond to market demands and obtain competitive advantage. However, can quality collaborations in teamwork lead to successful performance? On one hand, the members must highly cooperate and coordinate with each other in order to effectively perform and achieve project goals. On the other hand, each member as an individual has his own personal goals and obligations. Furthermore, team members, as humans, have also other external competing obligations such as family-work conflict. Therefore, more questions can be raised. Can quality collaborations in teamwork enhance personal achievements? Do quality collaborations in teamwork moderate conflicts of obligations? More comprehensive understanding is needed on the way management should format and encourage the right atmosphere in teamwork in order to improve the project's performance. The literature well asserts the relationships between quality collaborations in teamwork and the team's project success (Hoegl and Gemuenden, 2001). In the current study, we focus on the team level; we examine these relationships, and identify some conditions for success.

The coexistence and interdependency in a team internally generate a feeling of shared and distinct identity. Outsiders can see a picture of a complete unified unit with its performance as the main outcome. In this study we see the team as one unit directed toward a certain goal and, hence, we treat the subject from a unified perspective.

Theoretical and empirical framework

The theme of quality collaborations in work teams was conceptualized and constructed by Hoegl and Gemuenden (2001). They (Hoegl and Gemuenden, 2001, p.436) suggest a framework for quality collaborations, named Teamwork Quality (TWQ), and sees it as a multifaceted construct.

The TWQ construct is assembled from six facets: communication, coordination, balance of member contributions, mutual support, effort and cohesion. Hoegl and Gemuenden (2001, p.436) clarify that “the underlying proposition of this construct is that highly collaborative teams display behaviors related to all six Teamwork Quality facets. Thus, these six facets are indicators of the collaborative work process in teams and combine to the Teamwork Quality construct”. The proposition here is that highly collaborative teams display behaviors related to all six TWQ facets (Hoegl and Parboteeah, 2006).

The TWQ construct was empirically validated in Hoegl and Gemuenden’s (2001) study and further treated and verified in later studies (Hoegl, Parboteeah and Gemuenden, 2003; Hoegl and Parboteeah, 2006; Dayan and Di Benedetto, 2008, 2009). Following the foundation of prior studies, Hoegl and Gemuenden (2001) suggested and empirically verified a framework displaying two separate paths from TWQ construct to project success. The paths were individual success and team performance. They found positive relationships between the quality of collaboration in teams and personal success of the team member, reflected in member's satisfaction and learning aspects. They also found positive relationships between the TWQ and team performance, reflected in the effectiveness and efficiency aspects. This relationship between TWQ and team performance was further treated and verified (Hoegl, Parboteeah and Gemuenden, 2003; Hoegl and Parboteeah, 2006). They referred to the individual level and not to the team level. The major deficiencies in their study were the performance that was reported by the participants themselves and that all the variables were included in the same questionnaire.

In the current study, we focus on the team level and not on the individual level. We use objective measure for the team performance and the study includes several data sources. We also extend the study by adding some other important variables. We also propose a comprehensive causal model that includes the antecedents of the team objective and subjective outcomes.

Following Hoegl and Gemuenden (2001) conceptual model we predict positive relationships between TWQ construct and the two expressions of project success, individuals’ success and team performance. We also predict positive relationship between individuals success and team performance. Based on these predictions the following hypotheses were formulated:

- H1a: There will be a positive relationship between TWQ and personal learning.
- H1b: There will be a positive relationship between TWQ and personal satisfaction.
- H2: There will be a positive relationship between TWQ and team performance.

Group goals and individual goals are integrated in teamwork. Combining these goals into a common goal might motivate team members to make more effort to collaborate and interact with each other towards its accomplishment (Wageman, 1995, 1999). A project perceived as beneficial to individual career and team, leads to higher team performance (Denison, Hart and Kahn 1996; Holland et al., 2000). Tjosvold and Yu (2004) found that applying abilities for mutual benefit can predict team and personal performance. This sharing of common goals and

collaboration between team members contribute to mutual commitment and develop higher level of support and trust for each other (Sethi, 2000). Commitment atmosphere among team members leads to a platform of knowledge sharing and learning climate (Zarraga and Bonache, 2005). Commitment to the team also increases members' satisfaction with teammates (Bishop and Scott, 1997) and their work (Wageman, 1995). Furthermore, there is a correlation between satisfaction and individual performance (Judge, Thoresen, Bono and Patton, 2001). Satisfaction leads to high involvement in project (Elmuti, 1996) which leads to higher motivation for team performance. We therefore formulate the following hypotheses:

H3a: There will be a positive relationship between Personal learning and team performance.

H3b: There will be a positive relationship between Personal satisfaction and team performance.

TWQ and Motivating/Demotivating factors

TWQ is supposed to encourage a friendly atmosphere where members are motivated to make an extra effort in team work and support each other. This means that we should expect positive relationships between TWQ and individual motivating factors.

Well-established motivating factor is *motivation*. Motivation relates to the worker willingness to invest time and efforts in work, even at times it involves difficulties and personal sacrifices. Motivation has important role in predicting worker behavior and performance (Latham and Pinder, 2005). It is a system of internal and external personal forces that motivate him or her to work related behavior and set the shape, direction, strength and continuity of this behavior (Pinder, 2008). Since motivation is an abstract concept and differently defined, we choose to adjust a definition from teamwork perspective. Motivation here is the active participation and commitment of the individual to achieve a required teamwork outcome (Halepota, 2005, p.14). We assume that motivation of the team mates will be affected by TWQ and will increase both personal and team success.

The worker is also influenced by demotivating factors, which reduce his relative participation and commitment. Here we treat the concept as *conflict of obligations*. The literature well treat this phenomenon and suggest some expressions of conflict of obligations. Established conflict is known as work-family conflict (WFC) or family-work conflict (FWC). This conflict is related to all workers; however, it is more common among parents who exhibit double career (Bakker et al., 2005). This conflict is created when the two occupations are in confrontation and are competing on the individual limited resources (time, energy and the like) (Evans and Bartolome, 1986). WFC can be defined as a tension between two competing functions the individual is fulfilling as being a worker and a family person (Carlson et al., 2000). The conflict has an effect on work motivation, satisfaction and leads to decrease personal work performance. We propose that conflict of obligations negatively relate to personal and team success and TWQ has negative effect on conflict of obligations.

Taking the above into account, we formulated the following hypotheses:

H4a: There will be a positive relationship between TWQ and motivation.

H4b: There will be a negative relationship between TWQ and conflict of obligations.

H5a: There will be a positive relationship between motivation and learning.

H5b: There will be a positive relationship between motivation and satisfaction.

H5c: There will be a negative relationship between conflict of obligations and learning.

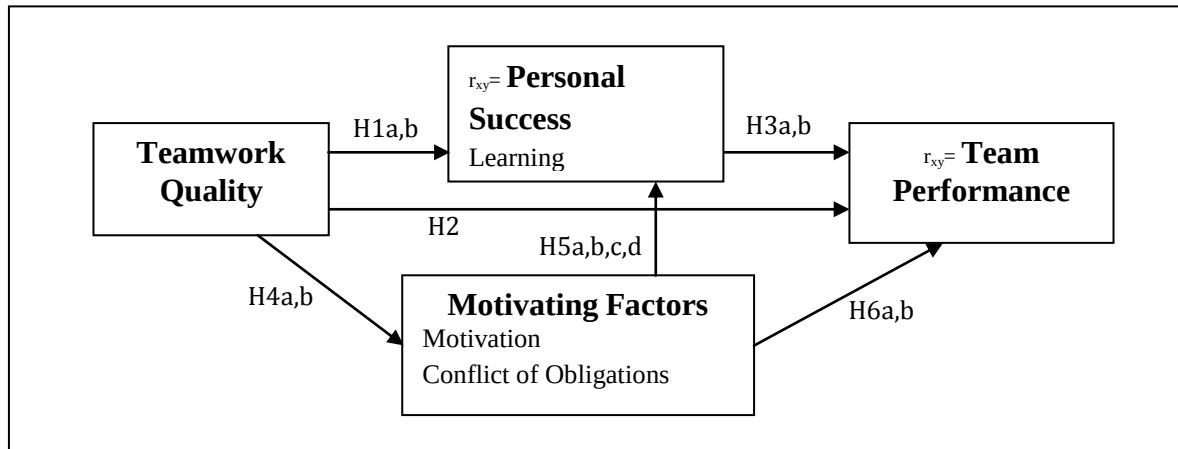
H5d: There will be a negative relationship between conflict of obligations and satisfaction.

H6a: There will be a positive relationship between motivation and team performance.

H6b: There will be a negative relationship between conflict of obligations and team performance.

Figure 1 illustrates the relationships suggested in this study.

Figure 1: The study's framework



Method

Research Procedure

The study sample was composed of teams that were part of a business game seminar. The participants were involved in a learning simulation of business management. They were organized into small teams, each team represented the management of one firm that interacted cooperatively and competed with other firms over several months. The teams were permanent during the management period and were required to operate in the dynamic hi-tech PC and chips industry. We used the Intopia B2B business simulation (Thorelli, Graves, & Lopez, 2005) with updated business scenarios as business environment. The main objectives were to develop the managerial and strategic skills, by practicing the abilities to manage a virtual global firm, operating in several international markets. The business position is influenced by the industry (other firms in the simulation), by the macro environmental conditions in the different areas, and by global economy conditions. Each management team is responsible for improving the firm's short-term and long-term performance, to create a competitive advantage in the dynamic arena in which it operates.

Measures

The study included two data sources. The first was a written questionnaire the team members were asked to fill in at the middle of the simulation. The items included TWQ construct variables that were adopted from Hoegl and Gemuenden (2001): communication, coordination, balance of member contributions, mutual support, effort, and cohesion; the personal success variables: learning and satisfaction; the perceived team performance: effectiveness aspect and also demographic data. For motivation and conflict of obligation multiple original items were phrased to capture these constructs. The second data source was the team actual performance that was measured as the team final grade at the end of the simulation.

Sample Characteristics

The sample was composed of 168 teams with 5-7 participants each, and a total number of 1048 participants. The participants were graduate students, in their last year of the MBA program. Almost all (97%) have jobs at the study period. Sixty three percent of the participants were males, with a mean age of 31 years (ranging from 22 to 55). Their

specialization track in the MBA program was: finance (32%), marketing (26%), information systems (22%), and management and organizational behavior (20%). The family status of the participants was: 40% single, 60% married.

Results

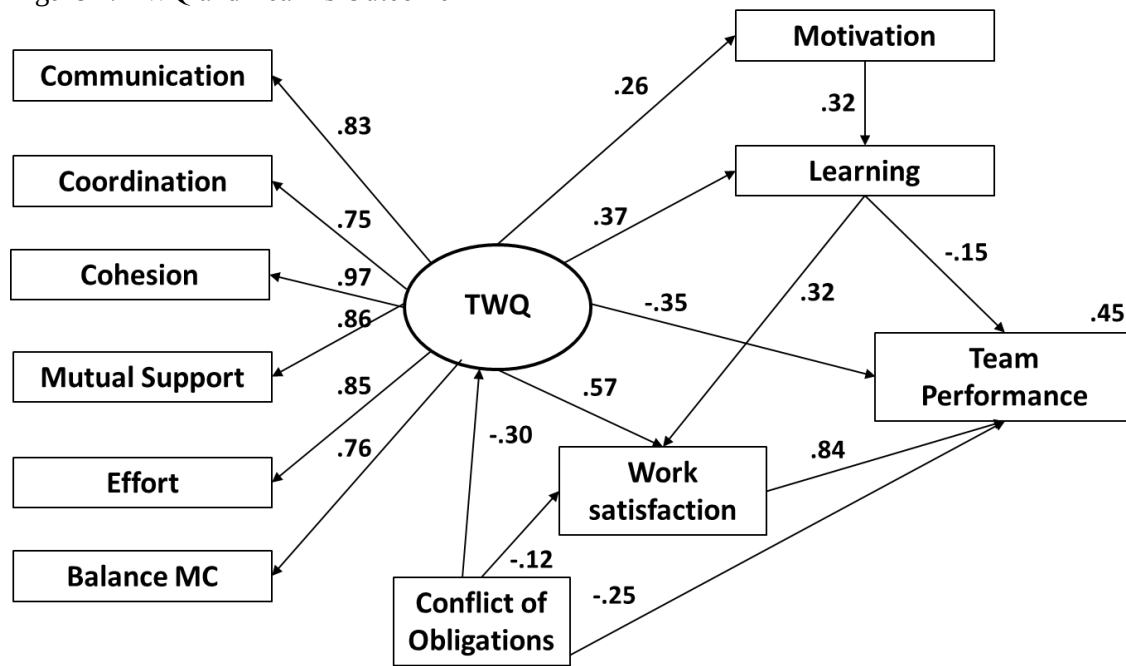
Internal reliability was checked and confirmed by Cronbach's alpha. The values for most of the variables are acceptable: communication, coordination, mutual support, cohesion, learning, satisfaction, motivation and conflict of obligations ranged from 0.71 to 0.91, confirming internal reliability for these scales. For balance of member contributions and effort the alphas were 0.57 and 0.55 respectively, close to reliability. According to Hoegl and Gemuenden (2001) the six facets of the TWQ pertain to the same latent construct, therefore they were put together in the study's model as observed variables to construct the TWQ latent variable. The AMOS 19 Structural Equation Modeling (SEM) confirms this latent construct (see figure 2). Next, we examined the correlations between the research main variables; table 1 presents the means, standard deviation and correlation coefficients.

Then, path analysis was conducted using AMOS 19 and Structural Equation Modeling (SEM), based on the maximum likelihood approach (using the correlation matrixes of measurement of the variance) for model testing. The overall fit statistics (goodness of fit measures) exhibit an acceptable level of fit (χ^2 value (35/168) = 44.68, $p = .127$; Comparative fit index (CFI) = .992; Normed Fit Index (NFI) = .966; Root mean square error of approximation (RMSEA) = .016), indicating that the path model is valid. The path model with the significant paths and the regression standardized coefficients are illustrated in Figure 2. The model demonstrates the variables' direct and indirect effects of TWQ on personal success (satisfaction $R^2 = 0.66$; learning $R^2 = 0.31$). These model's total variables accounted for 45 percent of the total variance of team performance ($R^2 = 0.45$).

Table 1: Descriptive Statistics and correlation coefficients of the study's variables

	Mean	Std. Dev.	1	2	3	4	5	6
1. TWQ	4.13	.34	1					
2. Work satisfaction	3.94	.53	.72*	1				
3. Learning	3.61	.50	.41*	.59*	1			
4. Motivation	3.88	.28	.24*	.30*	.42*	1		
5. Conflict of Obligations	3.86	.30	-.31*	-.34*	-.07	-.06	1	
6. Team performance	85.55	7.05	.29*	.57*	.21*	.10	-.40*	1
* Correlation is significant at the 0.01 level (2-tailed).								

Figure 2: TWQ and Team's Outcome



The model shows, that there are significant positive and direct relationships between TWQ and personal success variables, work satisfaction ($\beta = .57$) and learning ($\beta = .37$). Therefore, we accept hypotheses H1a and H1b. However, though a positive correlation displayed in table 1 ($r = 0.29$), there is a significant negative and direct effect of TWQ on team performance ($\beta = -.35$). The positive effect is not direct but indirect and through work satisfaction and learning ($\beta = .64$). Therefore, we reject H2. Furthermore, there is a direct positive relationship between personal success, expressed by work satisfaction, and team performance ($\beta = .84$), therefore we accept H3a. However, though a positive correlation displayed in table 1 between learning and team performance ($r = 0.21$), there is actually a significant negative direct effect ($\beta = -.15$). The positive effect is indirect ($\beta = .27$) and through work satisfaction. Therefore, we reject H3b.

We also found direct positive relationship between TWQ and motivation ($\beta = .26$) and motivation and learning ($\beta = .32$). However, no significant relationships were found between motivation and team performance or motivation and satisfaction. Therefore, we accept hypotheses H4a, H5a and reject hypotheses H5b and H6a. As expected, TWQ has negative relationship with conflict of obligations ($\beta = -.30$) and conflict of obligations has negative relationship with team performance ($\beta = -.25$). No significant relationships were found between conflict of obligations and learning or satisfaction. Therefore, we accept hypotheses H4b, H6b and reject hypotheses H5c and H5d.

Discussion

The study focused on TWQ from the team perspective and suggested a conceptual model integrating motivating factors. In respect to previous research (Hoegl and Gemuenden, 2001; Hoegl, Parboteeah and Gemuenden, 2003) this study suggests that TWQ relates to team performance and can predict personal achievements and team success. The relationships between TWQ and team success are dual. While the relationship of TWQ with personal success was found to be direct and positive ((Hoegl and Gemuenden, 2001), the relationship of TWQ with team performance was found to be direct and negative. This finding is actually

contrary to Hoegl and Gemuenden (2001) finding and matches the suggestion of Hoegl, Parboteeah and Gemuenden (2003). Though the positive correlation ($r=.29$, table 1) TWQ is not necessarily associated with increased team performance. The positive relationship is moderated by personal success in learning and satisfaction. This means that creating TWQ is not enough for high team performance. In order that TWQ will leads to high team performance there is a need for personal advantages. Furthermore, TWQ positively relates to individual motivation to make extra efforts in work and negatively relates to personal conflict of obligations. This means that TWQ leads to work atmosphere were team members sees themselves as part of one unit, feel committed to the team and backing up each other. Interestingly, TWQ does not totally eliminate personal conflict of obligations; however, TWQ can reduce this feeling. The effect of conflict of obligations on team performance is reduced ($\beta = -.15$) when indirectly effect through TWQ (the total effect on team performance $\beta = -.40$).

This study contributes to research and practice. First, the empirical study reinforces Hoegl and Gemuenden's (2001) TWQ framework. Second, the conceptual framework suggested here enhances the framework to include motivating feeling of the members. Third, from team perspectives, the study clarify that there is a dual relationship between TWQ and team performance; a direct negative relationship and an indirect positive one through team members' personal motivation and success. Finally, the study also has practical implication for human resource managers. Management must understand that besides creating quality teamwork they must encourage learning atmosphere in teamwork and create a platform for personal satisfaction in order to enhance team performance and success.

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Chapter 2: Ideology, Culture and the Organisation

A framework for organisational values transmission: An Australian case study

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Abstract

The objective of the research was to investigate how organisational leadership can influence organisational culture from a values perspective. The setting for this research was the new car franchise industry in Australia. A qualitative, multi-case study approach, using in-depth, semi-structured interviewing was the chosen methodology.

The research findings support existing literature on the perceived importance attributed to values by leaders in influencing organisational behaviour. Furthermore, four key interrelated managerial priorities associated with values alignment and transmission were identified. These are: the closeness of the organisational owners to the business; the consistency of the organisational values message; continual, relentless re-enforcement of behaviour; and a high degree of respect and trust in the organisational leadership.

Introduction

Organisational culture is acknowledged as being important to organisational outcomes and is an accepted concept in the management literature (Barney & Clark, 2007; Clayton, Fisher, Bateman, Brown & Harriss, 2008; Martin, 2002; Peters & Waterman, 1982; Schein, 2010). However, there is still noteworthy disagreement amongst academic researchers and organisational practitioners alike regarding whether, and if so how, organisational leadership can effectively harness the power of organisational culture and the degree to which the leader can influence or change it (Campbell, 2004; Martin, 2002; Sarros, Gray, Densten & Cooper, 2005; Scheel & Crous, 2007).

In the values literature, Management by Values (MBV) asserts that values can and should be managed to achieve a strong organisational culture (Blanchard & O'Conner, 1997; Dolan & Richley, 2006; Jaakson, 2010). MBV focuses on the strategic alignment of organisational values to organisational practice through leader behaviour. MBV acknowledges that the essence of a leader's job 'is to compel the organization to move in alignment with its strategic direction and its core values' (Dolan, Garcia & Richley, 2006 p4).

An organisation needs a corporate culture that facilitates achievement of its corporate goals. MBV proposes that for this to occur there needs to be an alignment of corporate goals (or strategic direction) and organisational values. In order for this to be effective these both need to be aligned through effective leadership. The underlying premise of MBV, that values can and should be managed to achieve a strong organisational culture, was used as the basis of this research.

This research investigated how organisational leadership influences organisational culture from a values perspective. This was achieved through an exploration of how important values are perceived to be by organisational leaders and how those leaders then seek to align organisational values to impact organisational outcomes.

Methodology and Organisational Setting

The core research problem was: How important are values perceived to be in an organisational setting and how can they be transmitted to influence organisational outcomes? This research problem was examined using the following research questions.

RQ1: What is the perception of the level of importance by organisational leaders of values and the alignment of individual and workplace values in influencing organisational behaviour?

RQ2: How do organisational leaders influence the process of values transmission in order to achieve organisational outcomes?

The research methodology adopted was a qualitative, exploratory, multiple case study (Cavana, Delahaye & Sekaran, 2001; Stake, 2000; Tharenou, Donohue & Cooper, 2007; Yin, 2009) using in-depth, semi-structured interviews as the main form of data collection. This approach enabled the exploration of the attitudes, perceptions, thoughts and feelings towards alignment of values and behaviours amongst respondents.

The research setting is the Australian automotive new car franchise market, a multi-billion dollar industry responsible for annual sales in excess of one million vehicles (FCAI, 2011). In Australia, new cars are sold through franchised dealerships. These dealerships are independent businesses that hold a franchise to sell and service vehicles for specific manufacturers. New car automotive dealerships generally sell new cars and used cars. They also provide service, spare parts and financing.

Two automotive dealerships were used in this study. Dealership one is a family owned single brand franchise situated on two sites in regional Victoria. Dealership two is a multi-franchise, externally owned, corporate dealership in Melbourne, Victoria. Both dealerships are independent businesses. They generally provide a similar range and style of product and service. The specific dealerships chosen have been de-identified. However, they both sell Holden Ltd cars as the main franchise. The two dealerships in this study each have annual gross turnovers in excess of \$AUD100 million and employee numbers range between 80 employees to 120 employees on site.

To address the research questions, the senior management teams at the two dealerships were chosen because they are the main conduits of organisational culture and values. The senior management teams consist of the Dealer Principal/General Manager, departmental managers and their deputies, responsible for New Car Sales, Used Car Sales, Spare Parts, Service and Finance.

A number of previous studies in Australia have asserted the importance of focusing on senior executives in organisations when assessing leadership and values (Sarros, Densten & Santora, 1999; Sarros & Santora, 2001). Furthermore, there is considerable general support in the literature for the critical role that senior executives play in organisational values (Jaakson, 2009; Lencioni, 2002; Schein, 2010). This is understandable because leaders are in a position to measure, control, develop and teach organisational members what is important (Jaakson, 2009 p. 58).

A total of 24 interviews were conducted across the two dealerships. Each interview averaged 45 minutes per respondent. In addition, the researcher kept a research log and recorded general perceptions of the dealerships and observations of individual reactions to interview

questions. Publicly available documentation on the dealerships was also gathered. At dealership two, the researcher attended a half day induction program for new employees. Dealership one did not have a formal induction process.

Findings and Discussion

The interview questions were divided into three broad themes. These were: the perception of the importance of values in influencing organisational outcomes; the types of values deemed important by respondents; and values transmission and the role of the leader. A broad overview of the responses to each of these themes is provided below.

Theme One. The perception of the importance of values in influencing organisational outcomes.

There was strong agreement across both dealerships concerning the importance of values in driving behaviour in the business. The majority of respondents acknowledged either directly or through examples that they understood what values were about and that those values were extremely important in ensuring the success of the organisation. The quote, *'If you haven't got values, you haven't got a business'*, expressed by a manager at dealership one and *'You can't drive a business by numbers, it's got to be a passion, it's got to be values'* from a manager at dealership two, were typical of the responses of managers from both organisations reflecting a common espoused belief of many respondents.

There is considerable literature which acknowledges the importance of values in driving organisational culture and therefore organisational behaviours. The findings from theme one, when assessed with aspects of theme two, established that practising managers in the two automobile dealerships expressed strong conviction as to the importance of values in influencing behaviour. Furthermore, there is evidence in both organisations that based on this premise of the power of values in influencing behaviour, leaders behaved in certain ways to harness the power of values. For example, at organisation one, management team meetings included discussions on values as evidenced by the following quote from a management team member, *"I guess our values are always put back in front of us [at management team meetings] when a decision has to be made or the wrong decision was made and, you know, you're told well, this is what our values are and this didn't fall within that"*.

Theme Two. The types of values deemed important by respondents and the two organisational cultures.

In dealership one, there was a very high level of consistency amongst participants in terms of their description of the espoused organisational values and organisational culture. They espoused strong organisational values of trust, loyalty and customer service; a coherent organisational culture focusing on trust, pride, honesty, customer service, teamwork and family; and numerous examples were expressed during the interview process that highlighted systems and beliefs that discouraged behaviour inconsistent with the perceived values of the organisation. There was strong agreement between the espoused organisational values and employees personal values. The quote, attributed to a second-tier manager *"...people that don't fit in don't last..."*, aptly summaries the sentiment at dealership one.

In dealership two, the following keywords taken from the interview transcripts relevant to theme two, expresses a more diverse perception of the organisation's values. These key words included: *"...corporate focused, responsible corporation, rules focused, poor communication, tell us what is going on, no feedback, customer focused, ethical business practices, impacted*

by outside ownership...". The following quote represents a typical perception by respondents of organisation two's values, '...there's probably two sets of values...the values as a business...and the way employees are regarded and treated... '.

The organisational culture at dealership two was more difficult to understand and less obvious than that at dealership one. Whilst "*corporate culture*" was a common comment, overall, there was a lack of consistency in answers amongst interview respondents. Furthermore, numerous interview respondents when asked to describe the culture at the dealership just talked about their own department. For example, one respondent when asked to talk about organisational culture replied "*In my department we have an excellent rapport with everybody*", another stated, '*I would rather not comment on other areas*'. It appeared that in the absence of a strong, cohesive, organisational wide culture, respondents tended to focus on their own departments.

Theme Three. Values transmission and the role of the leader.

The owners of both businesses were perceived by respondents to play a key role in the values transmission process. In dealership one the responses generally focused on the actions of the owners of the business and the consistent way they behaved towards employees and the message that this behaviour sent to the entire organisation. At dealership two on the other hand, respondents consistently remarked on the corporate focused, externally owned aspect of the organisation.

In dealership one numerous interview respondents provided positive examples of owner behaviour. These included simple activities such as how the owner of the business would stop and chat to car detailers in the morning, how the owners knew everyone's name and birthday, the regular organisation of social activities by the owners and the company policy of only promoting from within the business. The owners of dealership one, according to the interview responses of the managers, consistently demonstrated and practiced the values that they believed were important to the business.

A compelling example of consistency of owner behaviour at dealership one was during the Global Financial Crisis (GFC) of 2009-2010. The Australian automotive industry was hit particularly hard during this time and it was not uncommon for dealerships to lay off staff. The owner of dealership one made a point of not laying off staff. Instead the family took a cut in pay and carried excess staff until the automotive market recovered. This contributed significantly to reinforcing the importance of loyalty as a critical value for the dealership. The owners not only expected loyalty from employees, but also practiced loyalty themselves towards employees. The leadership practices at dealership one reinforced the organisational values.

In stark contrast, respondents at dealership two indicated that some staff were made redundant during the GFC. There was also a perception amongst respondents that more clarity in communication was required from the external head office and that there were too many restrictions placed on the organisation by the external owners. The following quote, from a departmental manager at dealership two, best represents the impact the outside rules and regulations had on organisation two "*...if you put too many constrictive rules in place, you will lose your culture and values...*".

In dealership two, the owners were considered external to the organisation. Whilst they no doubt were responsible for many positive initiatives, respondents tended to associate the

external owners with negative actions. Respondents repeatedly remarked on the excessive rules, regulations and directives emanating from head office. Many of these were seen as negative and inappropriate. For example, limiting social activities on site and deciding the type of vehicles that managers were able to use as company cars.

Interestingly, dealership two had a formal value based management system called Values Based Management (VBM), whereas dealership one had no formalised values transmission processes. At dealership two, the formal values system was not enough to drive values through the business because other actions on the part of the owners were contradictory and inconsistent. Formal mechanisms such as value statements are not enough on their own without other organisational actions.

An interesting ingredient in the values equation that emerged during the interview process is emotional intensity. At dealership one, the passion the owners had for the organisation came through consistently, not only in responses from family members but also from all interview respondents. As one manager remarked, *“it’s just a great place to work”*. At dealership two, there were examples of enthusiastic and positive managers but there was no evidence of the emotional intensity, or dealer wide enthusiasm towards the business, that was evident at dealership one.

The behaviours outlined above, when compared with participant responses as to the type of leader they believe is important, provide some keys to understanding values transmission. Key words across both the organisations regarding what to look for in a leader included *“...consistency, trust, respect, someone you like, gets involved, someone who supports people around them and knows what’s best...”*. The interview responses clearly identified that the owners at dealership one practised these behaviours more overtly than the owners at dealership two.

The two organisations, in spite of their different organisational cultures, had a number of similarities in the way values were transmitted. These similarities included the use of specific company policies to drive behaviour (albeit that at dealership one these policies were less formally promulgated than at dealership two), specific owner and management team directives that encouraged certain types of behaviour and a strong focus on the importance of values. The reasons for the differences in culture between the two organisations can be attributed to the way certain behaviours were encouraged or discouraged and the differing level of consistency between the ways these behaviours were pursued.

At dealership two the head office for the organisation, which was physically located outside of the organisation, was perceived to focus on policies and procedures. This appeared to provide a confused message to the dealership as to what was really important. These procedures and rules were not always perceived by respondents as positive or appropriate. The implementation of these rules, coupled with a seemingly contradictory formal system of values management, contributed to a lack of clarity concerning the organisational direction. In some instances this discouraged pro-activity in the workplace.

Findings in terms of RQ1 and RQ2

The clear message from the interview process is that organisational leaders understand the concept of values and organisational culture and believe in the important role that values plays in driving organisational behaviour.

Furthermore, the evidence has shown clear guidance on how leaders transmit values and its impact on behaviour. Ultimately it could be argued both approaches were successful in influencing organisational culture through sending a message about what is important. At dealership one the closeness of the owners to the business, the passion of the owners for the business and the constant reinforcement of behaviour and consistency of message by the owners contributed to a very clear and focused organisational culture. At dealership two the ownership, outside of the organisation, focusing on policies and procedures, sent a more confused message to the dealership. These procedures and rules were not always perceived by respondents as positive or appropriate. The implementation of these rules contributed to a lack of clarity concerning the organisational direction. It further encouraged a less pro-active approach to the workplace amongst those interviewed. However, as empirical evidence was not examined, there is no indication that organisation one was more commercially successful than organisation two.

Values Transmission Framework

Reviewing the findings above, four key practices were observed that consistently emerged as an issue in values transmission. These practices or behaviours were strongly represented at dealership one and were less strongly represented, or in some cases absent, at dealership two. Firstly, the physical and psychological closeness of the owners to the business significantly influenced what managers in the organisations perceived to be important. At dealership one, the close interaction between organisational ownership and the entire organisation left no doubt as to what the values of the organisation were about. Furthermore, the owners were ‘real people’ who could be seen around the business on a daily basis. At dealership two the physical separation of the owners from the business coupled with a perceived psychological separation contributed to a lack of clarity about what the organisational values should be.

Secondly, closely aligned with the first practice, was consistency of message. At dealership one the values that were espoused by the owners were by and large practised by them. The management team was expected to encourage the organisation’s values through workplace practice. At dealership two, the strongest dealer wide practice appeared to be strong customer service. This was no doubt due to the reward systems strongly focusing on customer satisfaction. However, other than customer service, as identified above, there was no organisation wide consistency of behaviour and work practices. It tended to vary from department to department.

Thirdly, at dealership one, the organisational values were constantly reinforced by owner and manager behaviour. At dealership two, whilst there was an organisational values statement which was widely publicised as well as a values transmission system, according to interview respondents these were not widely reinforced. More significantly, this process was perceived by a number of respondents as not being particularly useful.

In addition, at organisation one there was a very strong sense that individuals who did not embrace the organisational values were managed out of the business or left voluntarily. There was no evidence from the interview process that suggested this was the case at organisation two.

Fourthly, there was a consistency in responses across both dealerships as to the perceived importance of trust and respect in leaders. Interestingly, the acknowledged trust and respect of the organisational owners was stronger at dealership one than at dealership two. Furthermore,

at dealership two there was a level of neutrality and in some instances mistrust, in the organisation's owners.

Finally, dealership one demonstrated a strong, organisation-wide, values based culture. Dealership two did not. The researcher cannot claim that the reason dealership two did not exhibit a strong values based culture was exclusively due to the absence of work practices that were undertaken at dealership one. However, the clear distinction between the two organisations in work practices elicits enough questions to warrant further exploration.

The four organisational priorities identified above, based on the findings from the data collection process are represented in a proposed organisational values transmission framework. In diagram 1 below each of the four areas of the organisational priorities are represented by a box. The two most significant and consistent in terms of the research findings are the two boxes at the top; the closeness of the organisational owners to the business; and the consistency of the organisational values message. These are the primary factors. The two boxes at the bottom of the central goal (of an organisational culture based around the organisation's key values, termed a Values Based Culture) are; continual relentless re-enforcement of behaviour; and a high degree of respect/trust in the organisational leadership. These are the secondary factors. The two-way arrows between the four boxes represent the interrelationship between all aspects of the framework. The unidirectional arrows represent the fact that all factors contribute to a values based culture.

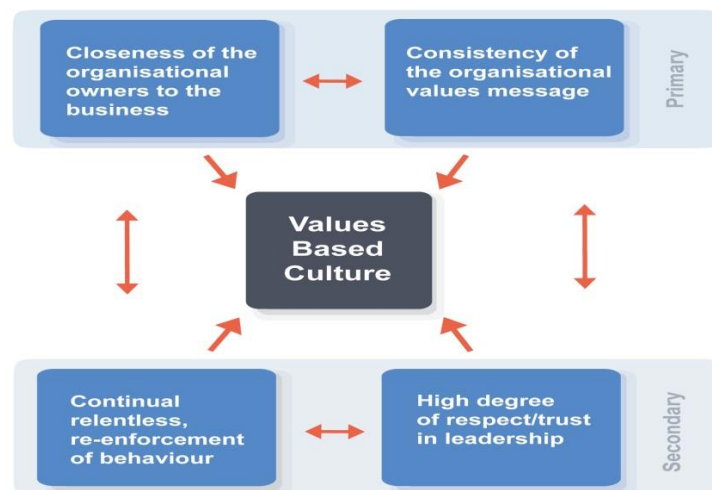


Diagram 1: An organisational values transmission framework

It should be noted that components of this framework are consistent with previous research on organisational values and MBV as well as popular (and influential) publications on the subject (Blanchard & O'Conner, 1997; Dolan et al., 2006; Jansen Kraemer, 2011; Kouzes & Posner, 2010; Lencioni, 2012; O'Reilly & Pfeffer, 2000; Rhoades, 2011). The uniqueness of this framework lies in the combination of these aspects and in particular the emphasis and importance given to the closeness of organisational owners to the business.

Conclusion

The finding from this research project supports previous research into the perceived importance of organisational values by organisational leaders, and enhances our understanding of organisational values transmission through the development of an organisational values transmission framework. It offers a point of reference for further

exploration and empirical research into the important subject area of MBV, and in particular, organisational values transmission.

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Balanced organizational values and their importance to an organization

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Abstract

The objective of present paper is to discuss the role of balanced organizational values as a predictor of business success in modern business conditions. In doing so, we mention some of the best known and most widely used approaches and models dealing with concept of balanced values. Particular attention is paid to the role of balanced values in the organizational context, in a way that they are aligned with the organizational mission. Finally, we raise the question whether such innovative approach to the study of organizational values could help modern business organizations to be more effective, or more precisely – to achieve several different and even conflicting goals, as an increasing need on the highly competitive market.

Introduction

Modern business conditions are characterized by constant and rapid changes on global level. Considering the increasing role of contrasting management, economic, and religious paradigms in the workplace, contemporary management seeks ways to balance different expectations of different stakeholders. Although the concept of balance is already well known and studied, especially in occupational science, there are still missing researches and papers entirely related to the role of balanced organizational values. The question is whether the fostering of organizational values from different value categories is just a marketing gimmick, promising idea, or a real and pressing need in the changing business circumstances. This is especially challenging if we consider that these value categories are usually opposing, such as expectations of different stakeholders are also opposing.

Although the idea of balanced organizational values is meaningful and attractive, it seems there is still no true recipe for prescribing an ideal set of such values. However, many authors have considered the problem of balance, especially in psychosocial sense, which provides an excellent foundation for further consideration of balanced values phenomenon in organizational context.

Conceptualization of organizational values

Every person – starting from the first years of childhood until death – thinks, lives and works according to some specific value system. In doing so, individuals sometimes put more emphasis on one, and sometimes on another values (Balaban, 2007). There are a number of confirmations, even from ancient time, indicating that values play a significant role in people's lives. For example, already in 2000 BC, one Egyptian tomb has an inscription describing the deceased as someone who "had not stolen, been covetous, killed a human being, told lies, committed adultery, or abused a young boy" (Sharp, 2002, according to Green, 2009, p. 50). Similarly, in 431 BC, the famous Greek statesman Pericles kept persuading Athenians in their war against Sparta to hold fast to "values such as those inherent to democracy: informal communication, the importance of dignity of the individual and promotion based on success. Pericles understood that these values may mean the difference between victory and defeat" (Weihrich & Koontz, 1998, p. 333).

By their nature, values as psychological construct are inherent primarily to the people. One of the most commonly used definitions, which comprehensively determines the concept of values, was offered by Schwartz and Bilsky (1987, p. 551). According to them, values are "(a) concepts or beliefs, (b) about desirable end states or behaviors, (c) that transcend specific situations, (d) guide selection or evaluation of behavior and events, and (e) are ordered by relative importance". Such understanding of the values concept basically relies on the thinking of Rokeach (1973), whereby the five formal value features clearly highlights the complexity of the concept.

Today, it is abundantly clear that organizations, as well as individuals, also have their own values, usually referred as core, corporate, shared, or simply – organizational values. They are one of the key components of the strategy, but also a guide to everyday business activities. In a dynamic, global environment, values could be understood as an imperishable and permanent mean of success that has strong potential for determining the future course of the company. They can instill a sense of identity, simplify decision-making process, enhance the sense of belonging to the organization and its goals, but they can also affect the entire community where organization operates. Dolan and Altman (2012, p. 24) think about values as of the nucleus of an organization, or the DNA of its culture, stating that "all meaning and behaviors orbit around them". Similarly, De Pree (2004, p. 108) stated that organizational values are "its life's blood", while even half a century ago Allport (1961, according to Becker, 2010, p. 43) labeled values are dominating force in life.

In a more precise determination of organizational values concept, it could help very simple, but concrete definition offered by Collins and Porras (1994, p. 73), who determined organizational values as "the organization's essential and enduring tenets – a small set of general guiding principles". Building on this framework, El-Homsi and Slutsky (2010, p. 23) define organizational values as "deeply embedded principles that guide all organizational decisions. They are a set of beliefs that specify common expectations and ideal behavior in a company. They determine how people must act in order to realize the organizational mission and vision." Finally, organizational values are the key element in strategic decision-making, because they are in the core of the whole activity of the organization (Melé, 2003, p. 192). It is therefore not surprising the great interest paid to the phenomenon of organizational values, by both theoreticians and practitioners in the field of organization and management.

Balanced organizational values as an assumption for business success

The concept of balance is already well known and studied, but there are still missing researches, and even courage, in fully applying that concept to organizational values. We can say that balance of organizational values is a characteristic of those organizations that evenly develop values from different, and not only from one category of values. In doing so, categories of values are specific and logically formed value groups with a common denominator, which essentially determine the properties of a particular value group.

Doing business in today's time is incomparably with doing business in the past. According to Senyucel (2009), that most important managerial task in 3000 BC was to finish the project at all cost, while today we are trying to create a healthy balance where organizational targets are achieved, but also individual needs are met as much as possible. As stated by Drucker (1999, p. 59), "in the United States, since the late 1920s, the prevailing theorem, however fuzzy, held that the business should be run for a balance of interests – customers, employees, shareholders

and so on – which in fact meant that it should not be accountable to anyone". Berle and Means (1932, according to Schwartz & Carroll, 2008, pp. 169–170) also indicate that in serving the interests of society as a whole, corporations must balance "a variety of claims by various groups in the community and assign to each a portion of the income stream". Already these considerations suggest an important role of balance in the organizational context, but many authors have been state concrete fields where balance should be achieved.

A particular challenge in managing organizational values represent different, even completely opposite needs and desires of different stakeholders of the organization. Thus Anderson (1997, p. 25) points out that in almost all its phases an organization is a reflection of competing value choices – owners want a return on their investment, employees want secure jobs and career development, managers are primarily interested for growth and industry leadership, while government regulators want minimal pollution, safety, work opportunities for a wide variety of groups, and tax revenues. The same author further states that this values competition is often a problem for managers, because they must find solutions that will avoid benefit of some groups, without having negative consequences for others. And that, of course, is neither easy nor simple.

Barrett (1998, p. 192) stated that one of six important characteristics of long-lasting successful organizations is that they have a balanced values-based approach to measuring performance that includes several different factors. For him, these factors are "corporate survival (financial results), corporate fitness (efficiency, productivity, and quality), collaboration with suppliers and customers, continuous learning and self-development (corporate evolution), organizational cohesion and employee fulfillment (corporate culture), and corporate contribution to the local community and society". It is obvious that organizational purposes, as well as the goals derived from them, may be different. If these differences would be taken into account, then it necessarily leads to the differences among organizational values of different organizations (Scott, 2002).

The key advantage of balanced culture, with a balanced organizational values as its basis, was accentuated by Gregory et al. (2009). According to them, an organization with balanced values has achieved prerequisites for operating in modern environment. World Business Council for Sustainable Development (2000 according to Garriga & Melé, 2004, p. 61) states that sustainable development, as a predictor of success, "requires the integration of social, environmental, and economic considerations to make balanced judgments for the long term". As well as others, Barrett (1998, pp. 104–105) also noted one very important characteristic of visionary organizations, and that is finding "a dynamic balance between the organization's needs for survival and growth, the employees' needs for personal fulfillment, and the local community's and society's needs for economic, social, and environmental sustainability".

Prilleltensky (2000) thinks that a good and just societies, as well as organizations, cannot be successful if they are lacking concrete values from one of three (according to him) group of values. These are "values for personal wellness (e.g., self-determination, autonomy, health, and personal growth), values for collective wellness (e.g., social justice, support for community structures), and values for relational wellness (e.g., respect for human diversity, collaboration, and democratic participation), whereas wellness is defined as a satisfactory state of affairs brought about by the fulfillment of basic needs" (Prilleltensky, 2000, p. 144). Finally, Cardona and Rey (2008) argue that a culturally healthy company, which tends to overall business success, must cultivate and develop values from different value categories. In their book *Management by Mission*, they explicitly state four value categories in which could

be classified specific/concrete values of today's organizations. These value categories seem to be very suitable and applicable for modern business practice, and they are (Cardona & Rey, 2008, p. 94):

- a) **Business values** – refer to the organization's business and profit-making activity (e.g. perseverance, efficiency, professionalism, results orientation),
- b) **Relational values** – promote quality in interpersonal relations (e.g. communication, team work, respect for people),
- c) **Development values** – aimed at differentiating and continuously improving the company (e.g. innovation, creativity, learning, continuous improvement),
- d) **Contribution values** – aimed at doing more for stakeholders than strictly required by the business relationship (e.g. customer satisfaction, interest in people, social responsibility).

All the above clearly indicate balanced organizational values as an assumption for business success. However, even the most persevering efforts to bring all organizational values into balance may not succeed, because "it is unrealistic to expect that companies can find and operate in a sweet spot where every decision delivers a win for the business and a win for society" (Rochlin & Googins, 2005, p. 18). Prilleltensky (2000) compared balancing of organizational values with dancing, stating that managing organizational values is a series of balancing acts. He thereby states that the first balancing act (dance) is between personal and collective wellness, and is mediated by values for relational wellness. Second balancing act is between pulls to help others and to help ourselves, and is mediated by the amount of power we have to advance personal well-being and the welfare of others. And finally, next balancing act is between the values and interests of the public, workers, and leaders, which is fostered in safe spaces for dialogue and in meaningful partnerships (Prilleltensky, 2000, p. 155).

Given that (balanced) organizational values are defined (or approved) at the level of top management, it becomes clear why managerial job is demanding and stressful. In fact, balancing organizational values presents, as stated by Buenger et al. (1996, p. 571) "a formidable challenge for managers", especially because "their choice set is bounded by the technological, environmental, and structural context within which they manage". But if we are aware of the impact that organizational values have on organizational success, profit and survival, as well as on the welfare of stakeholders (Day & Hudson, 2011), then managing organizational values, with special emphasis on their balance, becomes indispensable (and lasting) managerial job.

Towards a model of balanced organizational values

Based on the analysis of the literature in psychology, anthropology, organizational behavior, management, and business ethics, Scott (2002) showed that there is a whole range of different list and classifications of organizational values, as well as measurement instruments or methods dealing with them. However, considering the specific question of balanced values, special impacts in the scientific community have two best known and used approaches/models: *Competing Values Framework* and *Schwartz's values model*.

Competing Values Framework was based on the work of Quinn and Rohrbaugh (1983), and was originally designed for clarifying differences in the values that exist in different organizational effectiveness models. This model, shown in Figure 1, has very quickly become a device for mapping profiles of organizational values and conducting comparative analyses of them (Kalliath, Bluedorn, & Strube, 1999, p. 1179).

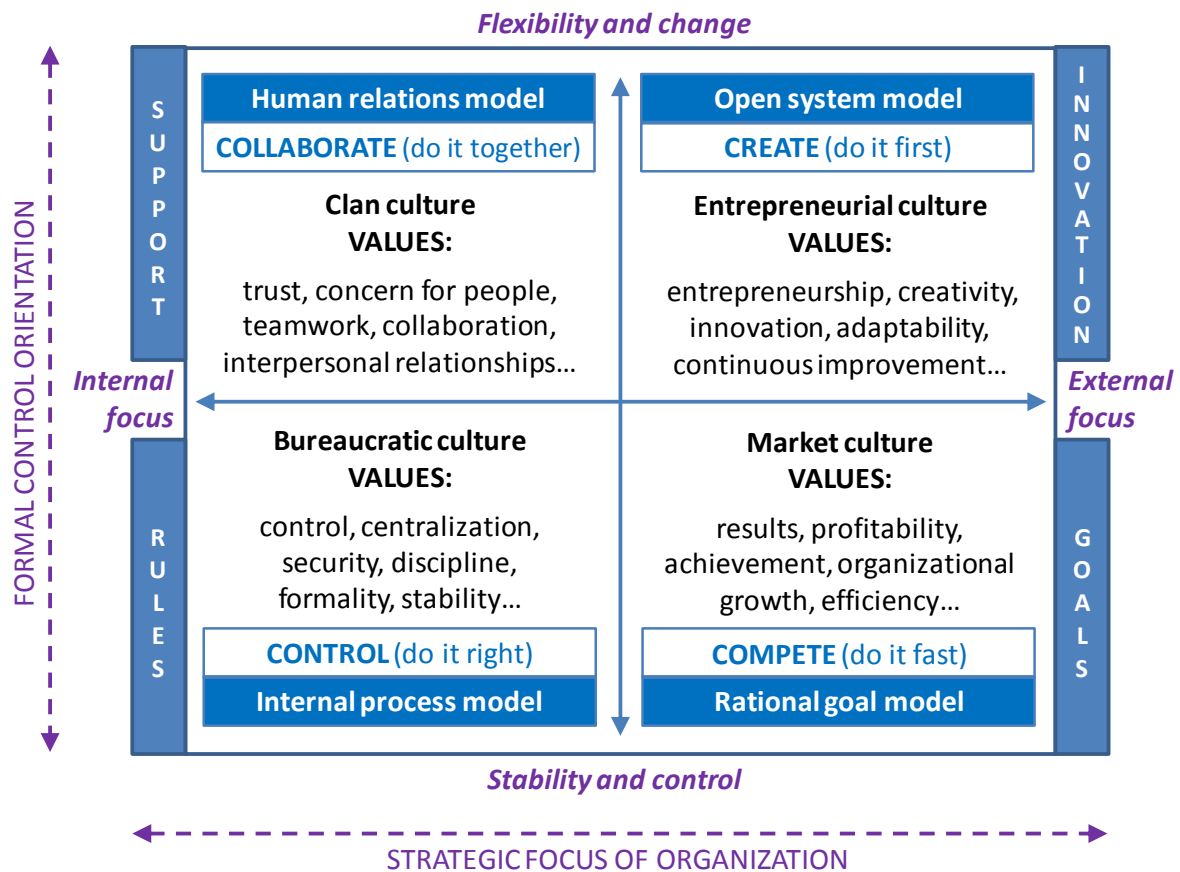


Figure 1: Competing Values Framework
(Adapted from Quinn & Rohrbaugh, 1983; Cameron, Quinn, DeGraff & Thakor, 2006)

The second model, without which we cannot discuss the concept of balanced values, was derived from a Schwartz's theory called 'Universals in the Content and Structure of Values' (S. H. Schwartz, 1992), and can be simply called *Schwartz's Values Model*. In his model, shown in Figure 2, Schwartz putted ten different motivational types of values that are content determined by motivational goals to which they are directed, as well as the specific values that represent them. In addition, this model is established as a universal and as such applicable not just for all the people, but for groups and organizations as well.

However, we can assume a question of further improvement of these two models, making them even more appropriate and actual in the present business environment. That opens up the possibility for new, innovative approach, which starts from the organizational purpose. Namely, the values and mission of the organization are (or at least should be) highly aligned and intertwined. That was perhaps first pointed out by Senge (1990), stating that combination of organizational mission (and vision) with organizational values creates the common identity that can connect practically all employees, even within a large organization. Collins and Porras (1996) similarly claim that organizational values, as a part of the core ideology, are already integrated in organizational mission (and vision), making them independent of the particular situation in which the organization operates. Organizational values show the way how to realize organizational purpose – they determine "how we treat each other, and how we see our clients, personnel, the community, and our suppliers" (Rampersad, 2001, p. 215).

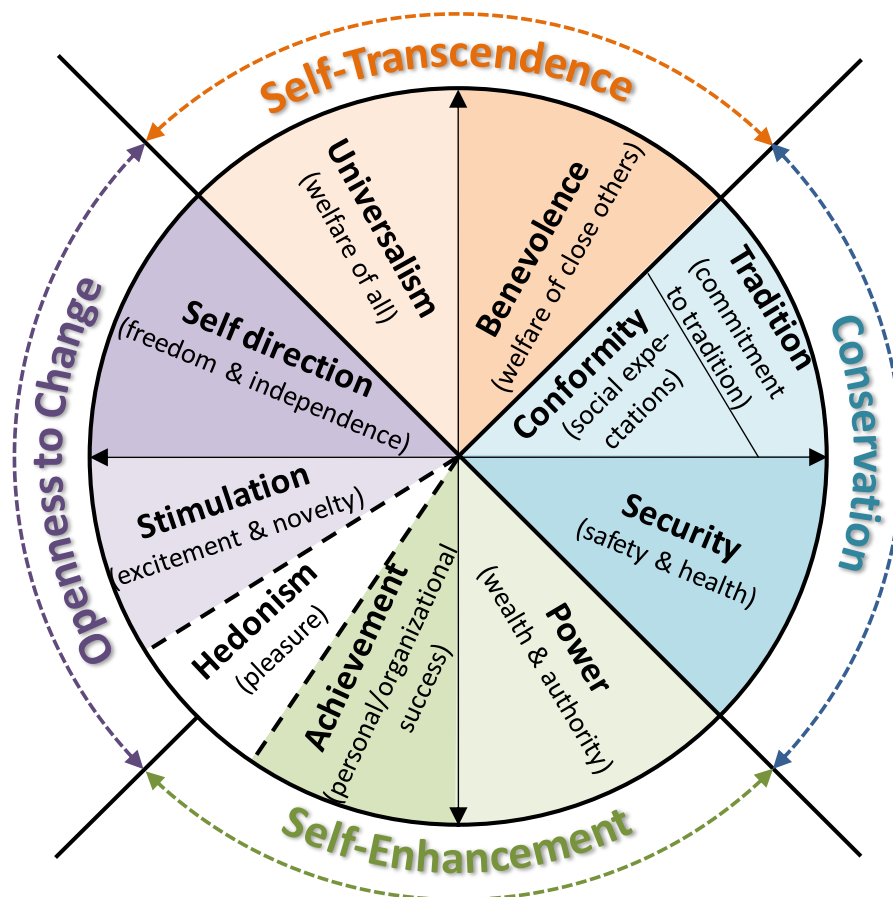


Figure 2: Schwartz's Values Framework (adapted from Schwartz, 1992)

A challenge of the chosen research area is the question whether it is possible to develop a comprehensive model of the balanced organizational values which will integrate existing knowledge, and which at the same time will be applicable to modern business practices. It seems that there are signs of application of such thinking in business practice (Cardona & Rey, 2008), but there is still no specific model that integrates most known value theories within such approach. If a company wants to be successful in the long run, it must necessarily achieve a balance between its goals (derived from the mission) and ways of achieving them. The role of balanced organizational values is actually to support such a balanced business.

Conclusions and implications for further research

Although we cannot talk about a set of concrete (specific) values that could generally be labeled as the best, we can search for the most appropriate group of values that are specific for today's business conditions. It does not necessarily mean that organizations with such balanced values will uniformly make decisions that will always and fully meet all stakeholders expectations, but will provide a structure for companies to work through conflicts (Rochlin & Googins, 2005). Freeman (2004, pp. 60–61) states that "management must keep the relationships among stakeholders in balance. When these relationships become imbalanced, the survival of the firm is in jeopardy". However, can we go a step further, and not just be afraid of problems? Can we even better use all benefits provided by balanced organizational values? We suggest connecting of the best known models of balanced values with some new approaches, in order to develop a new comprehensive model of balanced values. Such a model, which would take into account the need for development of balanced

values, as well as the need for accomplishing organizational mission, could contribute in studying the importance that balanced values have in business.

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A cross-cultural investigation of the effect of Capitalism and Communist ideology on work values

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Abstract

This is an exploratory study comparing the work values of full-time employees in a highly underresearched post-soviet country, Azerbaijan (n=530) to two other countries: Turkey (n=318) and Russia (n=659). The study uses data from the last wave of the European Values Survey conducted in 2008. The findings revealed that in all three types of work values, Turkish employees require a lot more from a job than the Azeri and Russian employees. Furthermore, Azerbaijan converged with Russia more than it did with Turkey. Specifically, these two countries did not significantly differ in intrinsic values and moreover, these values remained to be the least popular among the respondents. Azerbaijan differed most from Turkey in extrinsic values and from Russia in social values. The study concludes that the common economic and political past influences people's perceptions of extrinsic and intrinsic work values whereas common ethnic and religious roots influence societies' social work values. Furthermore, the impact of capitalism and communist ideology on work values is discussed at the end of the paper.

Introduction

Azerbaijan is a post-Soviet country in the South Caucasia, situated on the cultural and sociopolitical crossroads of Russia, the Middle East and Central Asia (Najafizadeh & Mennerick, 2003). All pre-Soviet countries, including Azerbaijan, went through fundamental economic changes while transforming themselves from a communist to a free market economy. This situation inevitably created challenges and uncertainty on both economic and social levels, and in turn, changed people's attitudes, values and priorities in different aspects of their lives. As Kepir-Sinangil (1994) claims that every change requires a new balance among the individuals' values and values are critical to the understanding of these cultural changes. Thus, one of the most immediate changes is usually observed in the values of people. This study explores one of the specific types of values, work values, of the Azerbaijani workforce in the new era, which started with the independence of the state in 1991. Furthermore, it compares the Azerbaijani data to the data from two other nations: Russia and Turkey which have close cultural and historical links with, and influence on Azerbaijan.

Azerbaijan was under the rule of Russian culture for almost two centuries. Such a long interaction inevitably brought along cultural and social influences. Because of its political hegemony, the Russian culture largely dominated the Azeri culture. In fact, Tokluoğlu (2012) claims that Azerbaijan is one of the most Russianised nations among the Post-Soviet states. Speaking Russian in daily life, in most cases more frequently than Azeri, or attending schools in which the medium of instruction is Russian is still perceived as ordinary and modern by the majority of Azeri people. Apart from a common past and cultural interaction between the two countries, there are also strong economic ties between the business communities of Azerbaijan and Russia.

The influence of Turkish culture on the Azeri culture started many centuries ago with the beginning of the Seljuk Empire (1037-1194) in both lands (Tokluoğlu, 2012) which made the

nation adopt the Turkish language and accept Islam. After the dissolution of the Soviet Union, the need for nation-formation for the emerging states occurred, necessitating the reconstruction of their cultural and ethnic space. In Azerbaijan, as one of these states, the main emphasis was given to ethnic nationalism rather than territorial nationalism (Tokluoğlu, 2005). In this respect, several common cultural factors, such as religion and language became the factors for building a nation based on ethnicity. Thus, for some parties of the society, Turkey which is an Islamic country like Azerbaijan and where a very similar language to Azerbaijani is spoken, became a reference in defining their ethnicity. Apart from strong ethnic ties between the two nations, Turkey is also an important trading partner for Azerbaijan.

Thus, understanding the divergence and convergence of these three cultures in terms of work values is essential for a better cross-border corporation. The findings of the study are expected to give insight into discussions about what factors are more dominant in bringing cultures closer and defining their work values: common language, similar ethnicity and religion, as in the case of Turkey and Azerbaijan or a common political and economic past, as in the case of Russia and Azerbaijan.

The study is exploratory in nature which asks the following research questions:

- 1) What type of work values is more dominant in Azerbaijan?
- 2) Is there a convergence with and divergence from Russia and Turkey in terms of most preferred work values in Azerbaijan?
- 3) What are the roles of the historical and cultural factors affecting this convergence and divergence?

Work Values

Values are essential concepts societies and individuals possess (Yu-Ping Wang, 2010), because they are in the form of conscious goals people would like to achieve in order to satisfy their biological and social needs and for the smooth functioning and survival of their groups (Ros et al., 1999). Furthermore, with their ability to mirror people's attitudes and behaviors, values are the best to look into when one desires a good insight into a certain culture. Work values are specific expressions of general values in a work setting (Ros et al., 1999). Although they can be influenced by work experiences (Hagstrom, 2007), they represent relatively stable goals that employees would like to achieve as a result of their efforts (Busacca et al., 2010). Work values describe the ideal work of a person, thus giving hints about the person's preferences for occupational choices and motivation. Therefore, people are motivated when they find the work environments aligning with their values (Furnham, 2005).

Work values are usually defined with two broad dimensions: intrinsic and extrinsic (Gahan & Abeysekera, 2009; George & Jones, 1997; Hegney, 2006; Choi, 2008). Nord et al. (1990) defined both types as end-states occurring as a result of different work related facts. Intrinsic work values occur as the result of the content of the work and refer to opportunities for skill development and interest in the work. Extrinsic values, on the other hand, occur as the consequence of work and refer to the external features of the job, such as physical setting at work (Cassar, 2008).

Despite growing cultural diversity in the workplace, there have been few studies (i.e. Karakitapoğlu et al., 2008; Gahan & Abeysekara, 2009; Pan et al., 2010; Furnham et al., 2005; Elizur et al., 1991; Warr, 2008) exploring the cross-cultural differences in work values.

There are variations among the work values and how they are ranked between and within the different cultures, as the literature displays (Siew et al., 2009, Gahan & Abeysekera 2009). The reason for these differences can be explained by the way people are brought up in their own cultures, which is very much affected by the history, religion and economic situation of the country. Therefore, cross-cultural studies in the field of work values and values in general are necessary to understand their contents, because cultural factors have such a big role in exploring the structure of work values (Zhang, 2007, Karakitapoglu et al., 2008).

Method

The study uses the data from European Values Survey (EVS). EVS was designed to provide cross-time and cross-national comparisons of values on a wide range of topics. The present paper is only concerned with the latest completed wave in 2008, which is, in fact, the only wave including Azerbaijan. In the survey, work values are measured by 17 specific job characteristics. Respondents were asked to choose the work values that they personally perceived important from the list. The sample for each country was developed by including only full-time employed people. The sample was refined further by excluding the data that had missing values on work values. Thus, at the end, 318 samples for Turkey, 530 for Azerbaijan and 659 for Russia were included in the analyses. As can be seen on the Table 1, the sample characteristics vary among the 3 countries with respect to gender, education and age. Although lack of homogeneity among the samples from different countries can be considered as a potential threat to validity of results, we tried to minimize this by examining the findings also across demographic variables.

Results

At the beginning of the analyses, work values were classified into three groups: intrinsic, extrinsic and social work values (Table 2) by aggregating the data of the relevant work value items. A mood's median test was performed to compare the work value classes across three countries. Prior to the test, an overall median was calculated for each class by combining the data from three countries (Table 3). The significant *p* value demonstrated that there were significant differences across the medians of each country and for each different work value class.

In order to find out from which countries Azerbaijan specifically differed, the data was converted into categorical variables. After the conversion, Pearson chi-squared test and measures of effect size such as Phi and Cramer's V were computed for each work value class. Among the three countries, extrinsic values were chosen most frequently (above the overall median) in Turkey, followed by Russia and lastly by Azerbaijan. The same situation was observed for intrinsic values. However, the comparison between Azerbaijan and Russia did not reveal a significant difference in intrinsic values (Table 4). Lastly, social values were again most frequently preferred in Turkey, followed by Azerbaijan. They were the least frequently preferred work value type in Russia. Azerbaijan significantly differed from Russia in social values most, although there was only 4 % of the variance accounted by the relationship between the country variable and social values measured by the chi-square. Among the three work value classes, social work values were most preferred both in Azerbaijan and Turkey whereas in Russia, the most often preferred work value type was the extrinsic values.

Table 1. Demographic characteristics of the respondents in Russia, Turkey and Azerbaijan

<i>Gender</i>	<i>Male</i>	<i>Female</i>			
Russia	252 (38%)	407 (62%)			
Turkey	241 (76%)	77 (24%)			
Azerbaijan	302 (57%)	228 (43%)			
<i>Education</i>	<i>Primary and Sec. Education</i>	<i>High School Education</i>	<i>University Education</i>		
Russia	41 (6%)	349 (53%)	269 (41%)		
Turkey	158 (50%)	94 (30%)	66 (20%)		
Azerbaijan	8 (1%)	164 (32%)	358 (67%)		
<i>Age</i>	<i>younger than 24</i>	<i>between 25-34</i>	<i>between 35-44</i>	<i>between 45-54</i>	<i>older than 55</i>
Russia	67 (10%)	173 (26%)	156 (24%)	186 (28%)	77 (12%)
Turkey	53 (17%)	114 (36%)	104 (33%)	35 (11%)	12 (3%)
Azerbaijan	92 (17%)	239 (45%)	102 (19%)	73 (14)	24 (5%)

Table 2. Classification of work values

Extrinsic work values: Good pay, Job Security, Good working hours, generous holidays, family friendly, not much pressure

Intrinsic work values: Learning new skills, responsible jobs, interesting job, achieving something, using initiative, have a say, meeting abilities

Social work values: Pleasant people, useful for society, meeting people, equal treatment

In order to find out the exact work values Azerbaijan differed from Russia and Turkey, the work values were analyzed also individually. Table 5 exhibits the evaluations made of the 17 job characteristics by the respondents. In this table, the characteristics have been ordered in terms of descending overall response frequency for each country. A series of chi-square analysis were conducted to test the effect of the cultural and demographic factors (sex, age and education) across the countries and within Azerbaijan. Table 5 also displays the findings of the gender effect on work values. It should also be noted that in order to stay focused, the cross-cultural comparisons were done only between Azerbaijan-Turkey and Azerbaijan-Russia. Therefore, the significant differences, indicated on the table with (*), refer solely to those comparisons.

The first line after each work value indicates the percentages of the positive responses for this value and the next line refers to the percentages of positive responses by males and females separately. As the statistics on table 5 exhibits, the majority of the work values that were perceived as important by the Azeri sample significantly differed both from Turkish and Russian respondents. In Azerbaijan, the most commonly desired work value emerged to be social. 86% of people in Azerbaijan viewed *working with pleasant people* as important. Generally, the findings revealed that Turkish employees require a lot more from a job than the Azeri and Russian employees. This is demonstrated by the fact that more than 70% of the Turkish respondents rated almost all the work values, except *interesting job* and *generous holidays*, as desirable in their jobs. Even the last ones were still preferred more than the half of the respondents. However, the situation both in Azerbaijan and Russia drew a different picture. In Azerbaijan, there was not even one characteristic that more than 90% of

respondents agreed on as desirable in a job. In Russia, *good pay* was the only value that the majority of people, 96%, perceived as important. The second most desired characteristic on the list, *interesting job* (74%) was rated substantially less frequently than good pay. Surprisingly, there was not even one characteristic relatively evenly preferred as important among the three countries.

Table 3. Results of the Mood's Median Test

Extrinsic / Median = 4,000			Intrinsic / Median = 5,000			Social / Median = 2,000		
Russia	Azerbaijan	Turkey	Russia	Azerbaijan	Turkey	Russia	Azerbaijan	Turkey
> Median			> Median			> Median		
212	141	269	175	140	225	199	260	281
32.20%	26.60%	84.60%	26.60%	26.40%	71.40%	30.20%	49.10%	88.40%
<= Median			<= Median			<= Median		
447	389	49	484	390	91	460	270	37
Sig.			Sig.			Sig.		
$\chi^2 = 3.158$			$\chi^2 = 2.195$			$\chi^2 = 2.904$		

N = 1507, *df*: 2

Table 4. The results of the chi-square tests and effect sizes

Azerbaijan - Russia (<i>N</i> = 1189)				Azerbaijan - Turkey (<i>N</i> = 848)			
	Chi-square	p value	Phi & Cramer V		Chi-square	p value	Phi & Cramer V
<i>Intrinsic</i>	, 003	, 505	, 002	<i>Intrinsic</i>	1,637	, 000	-, 439
<i>Extrinsic</i>	4, 360	, 201	, 061	<i>Extrinsic</i>	2, 676	, 000	-, 562
<i>Social</i>	44, 082	, 000	, 193	<i>Social</i>	1, 330	, 000	-, 396

The cross-country comparisons imply that, in terms of work values, Azerbaijan converged with Russia more than Turkey. As can be seen on the Table 5, among 17 characteristics, there were 5 values that approximately the same percentage of Azerbaijanis and Russians found important in a job (*achieving something*, *using initiative* and *having a say*, *treated equally and good hours*). These values, however, were towards the lower end of the list, being endorsed by only 36-54% of the respondents in both countries. Further chi-square tests were conducted to see if these commonalities were also valid for different demographic factors, such as gender, age and education level across Azerbaijan and Russia. The findings did not reveal a different picture. There was no significant difference for the intrinsic values across the gender, age and education groups, but in terms of good hours, females in Azerbaijan rated *good hours* significantly more often than the Russian female respondents.

Table 5. Rated importance of work values according to each country and the percentages of positive responses as a function of country and sex

Ranking	Countries		
	Azerbaijan	Turkey (T)	Russia (R)
1.	Pleasant people 86 (<T, >R) M:86 (<T, >R), F: 85(<T, >R)	Good pay 98* M:98*, F:99*	Good pay 96* M:97*, F:96*
2.	Meeting abilities 82 (<T, >R) M:87 (<T, >R) , F:75 (<T, >R)	Job Security 98* M:97*, F:99*	Interesting job 74* M:73*, F:75*
3.	Learning new skills 80 (>R) M:85 (>R), F:82 (>R)	Treated equally 95* M:95*, F:96*	Job security 73* M:72*, F:74*
4.	Not too much pressure 80 (<T, >R) M:79 (<T, >R), F:82 (>R)	Pleasant people 94* M:94*, F: 95*	Pleasant people 68* M:61*, F: 60*
5.	Good pay 69 (<T&R) M:66 (<T&R) , F:72 (<T,&R)	Good hours 94* M:94*, F:95*	Meeting abilities 60* M:61*, F:60*
6.	Responsible job 69 (<T, >R) M:72 (<T>R) , F:64 (<T, >R)	Meeting abilities 93* M:92*, F:93*	Achieving something 54 M:53, F:54
7.	Family friendly 65 (<T, >R) M:63 (<T, >R), F:67 (<T, >R)	Family friendly 91* M:93*, F:87*	Generous holiday 53* M:52*, F:54*
8.	Interesting job 58 (<R) M:59 (<R), F:57(<R)	Achieving something 90* M:89*, F:91*	Treated equally 53 M:52, F:53
9.	Useful for the society 56 (<T, >R) M:56 (<T, >R), F:62 (<T, >R)	Not too much pressure 89* M:91*, F: 84	Learning new skills 53* M:54*, F:51*
10.	Good hours 57 (<T), M:53 (<T), F:61(<T, >R)	Useful for the society 88* M:88*, F:88*	Good hours 50 M:50, F:49*
11.	Achieving something 54 (<T) M:55 (<T), F:53 (<T)	Responsible job 87* M:88*, F: 84*	Family friendly 49* M:43*, F:52*
12.	Job Security 53 (<T&R) M:50 (<T&R) , F:57 (<T&R)	Learning new skills 83 M:84, F:80	Using initiative 42 M:44, F:41
13.	Treated equally 51 (<T) M:53 (<T) , F:48 (<T)	Have a say 82* M:83*, F:78*	Meeting people 42 M:34*, F:46
14.	Meeting people 47 (<T) M:48 (<T, >R), F:46 (<T)	Using initiative 81* M:83*, F:74*	Responsible job 40* M:39*, F:41*
15.	Have a say 43 (<T) M:48 (<T), F:35 (<T)	Meeting people 74* M:75*, F:69*	Not too much pressure 37* M:35*, F:39*
16.	Using initiative 42 (<T) M:42 (<T), F:41 (<T)	Interesting job 59 M:62, F:51	Have a say 36 M:42, F:35
17.	Generous holidays 35 (<T&R) M:33 (<T&R) , F:38 (<T&R)	Generous holidays 53* M:57*, F:52*	Useful for the society 24* M:26*, F:23*

Male: M, Female: F, T= Turkey, R= Russia. Asterisks indicate $p < .001$ between sexes; symbols < and > indicate $p < .001$ between Azerbaijan and other countries.

Discussion

The findings provide important information on how industrialization and free market economy shape people's perception of ideal work. In Turkey, which is the first industrialized Muslim nation (Aygun et al., 2008, p. 206), industrialization started at the end of the 19th century and accelerated after the Second World War (Kepir-Sinangil, 1994). In addition, Turkey met the free market economy around the 1980's, earlier than Azerbaijan and Russia where the communist regime was present for more than seventy years. Both industrialization and the free market economy brought along secular and westernized cultural transformation in the Turkish society which influenced people's perceptions of work. In order to survive in a competitive business environment, people had to work hard, become professional and learn to be efficient. Moreover, since the free market economy and more active civil society offered people possibilities to make comparisons between what they have and what they could have by providing them the transparency to observe the other availabilities in the market, people became more informed, critical and demanding on their jobs. Consequently, they developed a clear understanding of what makes a job desirable. The fact that eight work values were preferred by more than 90% of the Turkish respondents illustrates this fact.

The study also revealed important insight about the influence of the sociologist ideology that left its traces on the post-soviet nations. The statistical comparisons between Azerbaijan and Russia exhibited that two countries did not differ in their preference for intrinsic values. Furthermore, in both countries, these intrinsic values remained at the lower levels of the list, least often rated as important. According to Magun (1998), the reason for this situation is the active engagement these values require from the employee. Similarly, interesting job is the second most frequently desired value in Russia because of its passive characteristic. Among the intrinsic values, Azerbaijan and Russia did not differ specifically in, *having a say*, *using initiative* and *achieving something*. Interestingly, these three values have entrepreneurial connotations (Aygun et al., 2008). This could explain why they are not perceived as important by the majority of the respondents in two post-soviet countries, since individuals who demonstrated a spirit of entrepreneurship were contemptuously called "speculators" in Soviet times (Pucetaite & Lamsa, 2008). The highly centralized and autocratically managed organizations in all former communist bloc created type of managers who require employees strictly following rules, not questioning authority, and refraining from displaying too much independent initiative (Cseh et al., 2004). Employees were severely punished for making mistakes at work (Fey et al., 2009) and displaying initiatives were considered to be dangerous (Tidmarsh, 1993). This institutionalized a culture that promoted passivity and subordination (Tokluoglu, 2005). In Soviet times, socialist institutions and enterprises did not evoke the sense that the work was something that people can be/need to be productive (Magun, 1998) nor performance was a factor affecting salaries (Pucetaite & Lamsa, 2008). In contrast, achieving something is found to be very important in Turkey (by 90% of the respondents), where the productivity has been one of the key determinants of success and promotion in its competitive markets.

Perhaps one of the most astonishing findings of this study is the significant difference between the most dominant work value type in Russia (extrinsic) and Azerbaijan (social). According to Cseh et al. (2004), some post-soviet countries due to being further from the center of power during the Soviet era, were able to keep more of their traditional values in various spheres of social and economic life. When the Union dissolved, more individualistic business management style in Russia emerged, whereas other countries were able to get back to their more traditional and collectivist management style that they has never gone away but

only went below the surface in the Soviet times. Apart from the difference between the social values, Russia and Azerbaijan also significantly differ in their preference for “*family friendly job*”, latter having more positive responses. It also points out to the Soviet’s inability to change the traditional values in Azerbaijan. Inglehart and Baker (2000) explain this situation with the high fertility rates in traditional societies which enables traditional values to remain widespread despite the forces of modernization.

The convergence between Azerbaijan and Russia was an expected result. According to Inglehart and Baker (2000), communism left a clear mark on the value system of people who experienced it. In their study, they concluded that although religion leaves some enduring influences on the values and attitudes of people, what makes the societies resemble each other is the nation itself not the religion. In other words, people with different religions in the same society will be more similar than different societies with the same religion. Our findings do not contradict this either. Although the majority of people are Muslim both in Turkey and Azerbaijan, we found out a bigger convergence between Azerbaijan and Russia. Having lived for long years together created a cultural bond between Azerbaijan and Russia. Our study also showed that although the preference for each work value in Azerbaijan and Turkey type was significantly different from each other, the social values were the most desired work values in both countries which can be an indication of the influence of the common cultural characteristics of both countries formed by the common religion, language.

In summary, the findings of our paper point out that the system of the free market economy regulates decision making and behavior of individuals (Pucetaite & Lamsa, 2008) and gives them incentives to exercise professionalism. As a result, people in such contexts require more from job compared to the people who did not much experience in competitive work settings, such as in the times of the Soviet Union where employee motivation and efficiency were not perceived as important and relevant. Furthermore, our findings imply that the common economic and political past mainly influences people’s perceptions of extrinsic and intrinsic work as these are the main factors forming people’s expectations of a desirable job. Common ethnic and religious roots, on the other hand, mainly influence social work values as these factors are highly influential on societal norms.

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Democracy as a value: Some findings of the research of Russian education students' Democracy beliefs

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Abstract

The paper reports on the Russian part of the international Global Doing Democracy Research Project examining perspectives and perceptions of democracy and democratic values in education. The aim is to ascertain the beliefs, experiences, and perspectives of participants in relation to democracy in general and on how education supports, cultivates and engages in, and with, democracy. The obtained data can be used for comparative analysis of democratization of education in different countries.

Introduction

In 2006 an English-language weekly news and international affairs magazine, *The Economist* published for the first time the so-called «Democracy Index», followed by updated lists produced in 2008, 2010, 2011, and 2012. The Index measures the state of democracy in 167 countries based on 60 indicators grouped in five different categories: electoral process and pluralism, civil liberties, functioning of government, political participation and political culture. According to the first three calculations of the Index, Russia's scores ranged from 5.02 (2006) to 4.26 (2010) on a scale from zero to ten and Russia was classified as a «hybrid regime». In 2011 it was downgraded from a hybrid regime to an authoritarian regime and placed at 117th on the list (and at 122nd as of December, 2012). There are different factors defining that result including a low level of democratic political culture of Russian population.

Education is believed to be a key policy area for achieving democracy-related goals that plays a significant role in political socialization of citizens. And educators are supposed to be actively involved in cultivating and shaping the educational experience for students in relation to their present and future attitudes, behaviors, ideologies and engagement regarding democracy, citizenship and social justice. As Zyngier (2013) states “progressive, critical democratic education work in classrooms and schools, along with the resultant experience for the students, will be greatly diminished if teachers have a weak or disaffected attachment to democracy themselves” (p. 59). Therefore, they must be ready and able to do that work which means that they must be properly prepared for it through the education they get themselves in the universities and colleges.

Democracy as a word and as an ideology has become very popular in Russia since the late 1980s – early 1990s and as a guiding principle for the state and political system evolved from the “liberal democracy” until current “sovereign democracy” which is considered as a democratic ideal by the Russian state at the moment. In the 1992 Russian Federal Education Act, democratization was identified as one of the main priorities of education policy that should be oriented to educating individuals who are independent, show initiative, ready to make decisions in different life and professional situations, and responsible for their country's destiny. A number of studies conducted by Russian and international researchers in the 1990-2000s analyze the efficiency of that policy.

According to the Levada-Center annual reports (2010-2013), in the 1990s not more than 14% of Russia's population believed that political life in Russia could be coupled with democracy. This finding may be a result of profound disappointment with the Yeltsin era when democratization became associated with chaos, uncertainty, inequality, etc. In 2005-2011 the numbers changed considerably starting with 32% in 2005, a maximum of 54% in 2008 and 37% in 2011; and almost twice as many people believe that Russia needs democracy (in addition, between 2005-2011 39-49% of respondents have believed that it must be an absolutely unique type of democracy that is appropriate to the national traditions and specifics of Russia). But at the same time, Russian citizens have not demonstrated the respective level of civic competence and political culture. As Ivanova's study showed (2005), none of three orientations to establishing and functioning of civic society – informational, normative and behavioral – were developed among the Russians and there was believed to exist dissonance between the attitudes and real behaviors of population. This tendency was especially strong among the young generation that was shifting from traditional Russian values and was not inclined to share important norms and rules of civic society such as respect of law and tolerance. That must be one of the main reasons why Russia was ranked the 24th out of 28 countries for the Civic Competence Composite Indicator based on the data from an international study on the citizenship of 14 years old children made in 1999 that tested their knowledge and skills on democracy and asked them questions about their attitudes and values towards engagement (in 2009, according to the results of The International Civic and Citizenship Education Study, Russia was ranked the 20th out of 38 countries for civic knowledge of lower secondary school students).

In addition, T. Ivanova states that the most probable social basis for civic society development in Russia is college- and university-educated individuals. The research conducted by Vishnevsky and his colleagues (2009) is devoted to studying inconsistency and new trends in establishing of civic competence in Russian students. The results of this study show that university students take an interest in politics only occasionally, mainly in response to current political events. Instead of participating in the activities of formal political institutions they prefer to be involved in non-formal public associations or to avoid participation in political life altogether. The main reason for such political indifference is not the lack of interest or social passiveness, but distrust of politicians and doubt as to the importance of personal participation.

Method

In October 2008 Dr Paul R. Carr from Canada (8th on The Democracy Index) and Dr David Zyngier from Australia (6th on the Democracy Index) met at the second *Doing Democracy by Learning Conference* held at OISE (Ontario Institute for Studies in Education), University of Toronto, Canada, and initiated the Global Doing Democracy Research Project (<http://doingdemocracy.ning.com>). The focus of the project is on how education supports, cultivates and engages in, and with, democracy. While there are many on-line networks created among academics for the exchange and sharing of ideas, the development of such an on-line activist research group focused on democracy and democratic education is uncommon. A major focus at this phase of the project involved using a collaboratively developed and locally contextualised on-line survey tool that collected both quantitative and qualitative data from diverse groups of education-students, academic staff, and practising teachers. Each researcher is responsible for the analysis of the data within the shared critical pedagogical framework that was originally developed by Carr (2010). The aim of the research, ultimately, is to compare and contrast these findings and implications across diverse

political contexts, including the old democracies (countries such as the USA, Australia, Canada), emerging democracies (those countries coming out of autocratic, military or other dictatorships and or colonial rule), and what have been termed the new democracies (places and countries that are doing democracy differently as a result of public initiatives found in Latin America and elsewhere).

Since 2008 the on-line survey has been translated into Portuguese, Spanish, Bhasa Malay, Greek, Turkish, French, Russian and some other languages and has been already adapted and applied in over 30 international contexts. The study seeks to contextualize, identify, problematize and analyze how educators experience, understand and perceive democracy, and how this connection to democracy actually shapes the democratic experience for themselves and students in and through the education experience. The research instrument for this study is a detailed questionnaire containing approximately 50 questions solicited Likert scale quantitative responses as well as open-ended qualitative responses. The questionnaire does not define such terms as democracy (it is apparent that there is no one universal definition for it), citizenship, and social justice to participants but, rather, asks them to do so. The aim is to ascertain the perceptions, experiences, and perspectives of participants in relation to democracy without judging the level of sophistication they demonstrate through their responses (Carr, 2008, p.150). 227 respondents from Russia (199 female and 28 male students majoring in education at the Udmurt State University, Russia) completed the survey.

Results and Discussion

In this paper we will analyze the participants' responses to the three research questions: what they believe democracy is, how it is developed in Russia and in some other countries according to their opinion and what they can and will do as future educators to promote democratic values.

All the participants had to provide at least one definition of democracy though the level of sophistication they demonstrated in their responses varied significantly. We classified them into eight categories (Table 1, next page).

The majority of the respondents (approximately 37%) provide either etymological (based on the word origin) or so called "empirical" (based on the observable features like voting, elections, etc.) definitions. Another third of the respondents define democracy using concepts associated with basic principles of a democratic society structure. Here the idea of "freedom" is mentioned 92 times, "equality" – 28 times and "collectiveness" – 20 times. Approximately 9% of the participants provide either no answer or copy a definition from a dictionary or some other source; another 5% provide a general or neutral definition with no connection to the essence of the discussed phenomenon. About 6% of the respondents demonstrate negative or skeptical attitude towards democracy, 3.5% provide non-typical definitions. And only 4% of the participants are able to define democracy in a more sophisticated way based on reasoning and their own understanding of the issue.

Table 1. Types of definitions of democracy

The type of the definition	Number and percentage of responses	Examples of responses
Etymological definition	49 / 21,59 %	- power of people; - power to people; - people in power.
Empirical definition	35 / 15,42 %	- collective decision making; - opportunity to elect the government; - elections, voting.
Basic-democracy-principles definition	79 / 34,80 %	- freedom (of choice, religion, actions, speech, thoughts, etc.); - equality; - autonomy, independence; - justice; - plurality; - responsibility and accountability.
Sophisticated definition	9 / 3,96 %	- freedom of speech, thoughts and actions that ends where the freedom of the other occurs; and taking responsibility for the consequences and effects of getting that freedom; - being aware of one's own rights and duties and using this knowledge in the everyday situations.
Original /metaphorical definition	8 / 3,52 %	- when people are not afraid of power; - when there are no monopolistic organizations; - Utopian idea: people will never get a chance to experience real freedom and equality though the USA is quite close to it having "democracy in action".
Neutral definition	12 / 5,29 %	- format of power; - political regime; - social order.
Negative/skeptic definition	14 / 6,17 %	- ineffective format of government; - almost complete permissiveness; - power of crowd; - no need in our country; - Utopian political doctrine created to cover up aggression and cruelty of power.
Dictionary definition	17 / 7,49 %	- a form of government in which all eligible citizens participate equally in the proposal, development, and creation of laws.
Refuse to answer	4 / 1,76 %	

The next important block of questions is connected to the respondents' beliefs regarding the development of democracy in different countries. The participants were asked to rate several countries from 1 (not very democratic) to 5 (very democratic). As we can see (Table 2, next page), the majority believes that Russia is not a really democratic country (the average score is 2.35) compare to Australia, France, Canada and the USA.

Table 2. Development of democracy in different countries

Countries	Scores					Mean rank
	1	2	3	4	5	
Iraq	94	79	38	7	4	1,86
Saudi Arabia	75	75	54	13	5	2,09
India	58	86	61	15	4	2,20
Russia	40	84	88	14	1	2,35
South Africa	46	78	68	25	4	2,38
Cuba	53	68	70	29	5	2,40
China	61	61	58	34	9	2,41
Brazil	15	64	99	39	5	2,80
Japan	35	45	75	51	19	2,88
Australia	11	41	98	54	22	3,15
France	8	24	81	87	23	3,42
Canada	6	29	72	91	25	3,45
The USA	4	14	74	99	36	3,66

When asked about the possible ways to promote democratic values through education in case if they work at school, 167 respondents (approximately 75% of the sample) have specified how they would do that (Table 3, next page).

In spite of the fact that approximately a third of the education students participating in the survey are not going to work at school, have no idea or have never pondered upon what, how and why should be done to promote democracy values through education or are even oriented towards undemocratic values, more than a half of the respondents have got a broad idea of possible ways and techniques of developing democratic experiences of their future students.

Conclusion

This study focused on analyzing how educators experience, understand and perceive democracy, and how this connection to democracy shapes the democratic experience for students in and through the education experience. Results of the study indicated that Russian students' notions of democracy are not complete and deliberate enough. The study also revealed that they perceive Russia as not a really democratic country in comparison to other, especially western, societies. At the same time, the majority of the respondents who plan to work as educators are willing to promote democracy values in their future classrooms though they are not always aware of the possible ways to do that. The Russian part of the survey provides the data for further comparative analysis of democratization of education in different countries for the further development of curriculum, pedagogy, policy and practices that may positively affect the institutional culture of education.

Table 3. Proposed ways to promote democratic values through education

	Number and percentage of responses	Examples of responses
Active promotion of democratic values	45 / 26,95 %	- will discuss acute social issues with students and try to solve them at least theoretically; - will promote equality in education and fight for equal rights of all students; - will teach students not to be afraid of expressing their point of view; - will treat every student as a unique individuality.
Teaching democracy related subjects and topics	26 / 15,57 %	- will include democracy related topics in teaching other disciplines; - will explain what democracy is based on theory and everyday life; - will organize extracurricular activities devoted to democracy related issues.
Teaching democracy based on standards and recommendations	19 / 11,38 %	- will teach according to what is specified in the standards; - will promote the notion of democracy based on special literature and instructions; - will find a teaching plan for promotion of democracy and will follow it.
Inactivity or disbelief in the possibility to promote democratic values through education	27 / 16,17 %	- no use to try changing anything so I will just explain to my students that democracy is impossible in Russia; - I will not try to thrust my opinion on students as they should decide themselves if democracy is really necessary; - it is impossible to promote democracy at school as working there we become a part of the system and follow its undemocratic rules.
The lack of understanding how democratic values can be promoted through education	26 / 15,57 %	- have no idea about such a way; - never thought about that; - will decide when start working according to the situation in the country; - firstly, it is important to understand what for we should promote democracy.
Promotion of undemocratic values	2 / 1,20 %	- in case if I happen to work at school I will be an authoritarian teacher; - we do not need democracy at school; - absolute democracy at school is a nonsense.
Unwillingness to work as an educator	22 / 13,17 %	- I will not work at school as it is corrupt as any other state institution in Russia; - I will never work as an educator to avoid such responsibility; - I will never ever work at school.

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Work values and organizational climate in a changing environment

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Abstract

The Brazilian National Institute of Industrial Property - INPI is a public organization which is currently under a deeply changing process. Changes have occurred in all areas of the organization including technology, structure, new employees and new activities to diffuse the culture of Industrial Property. To deal with these changes, INPI has focused to improve its workforce competences.

In 2007, INPI started an Organizational Project to improve its quality and results. To support this project the Human Resources area has developed a new model as a way to be a strategic partner. The initial results were presented by Fernandes at the 11th and 12th Bi-Annual ISSWOV Conferences (2008 & 2010).

This study analyses the relation between organizational climate study and the work values structure of a group of employees in the management development program.

In order to identify the relation between the three modalities of work values (affective, cognitive and instrumental) and the perceptions of employees in the environment climate study it was used the Organizational Climate Questionnaire applied by Great Place to Work Institute (2009) and the Work Values Questionnaire of Elizur (1984), adapted by Tchaicovsky (1992). The Environment climate questionnaire has been applied in organizations in several countries as a way to know behavior, attitudes and feelings that characterize them.

Both questionnaires were distributed to employees in the organization. The employees were from different levels and belonged to different areas in the organization. Using data obtained from 377 employees in the Organizational Climate study and 25 employees in the work values study we analyzed the organizational climate and the work values structure comparing the responses presented.

Introduction

In the last two decades, Brazil has been facing several changes and challenges in its public and private organizations. The organizations are confronted with all kinds of new challenges globalization, new technologies, more knowledge based on work force demographics and increased levels of competition and quality demands. In this scene, arises the necessity of new organizational model more integrated and participative.

In Brazil, The National Institute of Industrial Property - INPI is an example of public organization in deeply changing process to face this context. Changes have occurred in all areas of the organization including technology, structure, new employees and new activities to diffuse the culture of Industrial Property. To deal with these changes, INPI has focused to create a learning culture and one of the most important drivers is to increase the managers capability and develop the values of participation and learning as a way to give to the organization sustainability in the long term (Fernandes, 2008 & 2010).

The modern organizations need to give employees a chance to develop themselves, to try, to participate and share knowledge, values and ideas to build an organizational synergy and improve the performance capability of an organization (Nonaka & Takeuchi, 2000; Davemport & Prusak, 1998; Senge, 1997). In addition, the individuals become more

motivated when they are able to participate and take decisions (Mcgregor, 1966; Fleury, 1996).

In recent years, INPI has experienced a wide and deeply changes internally to improve its results and to consolidate its role in worldwide Intellectual Property system. In this context, several changes in technologies, structure, process, leadership and workforce are in course.

The Management Development Program - MDP is important to support organizational and cultural changes in order to improve the quality and results in the public administration context. In this scenario, to know and to understand the values profile and the organizational climate is important to make changes in the organization.

As way to be effective in changing process, it is important to know the perceptions of employees in the environment climate. As way to study and identify the perceptions it was used the Organizational Climate Questionnaire applied by Great Place to Work Institute (2009). The concern is to know behavior, attitudes and feelings that characterize the organizational environment.

On the other hand, values are also considered to play an important role in understanding the individual behavior (England, 1967). Special attention has focused on the analyses and evaluation of personal life and work values in the last years, Braithwaite & Law (1985), Schwartz & Bilsky (1990), Elizur & Saggie (1994). The values as subject have been considered important as a way to understand the human behavior.

Objective of the study

This study attempts to analyze the relation between organizational climate study and the work values structure of a group of employees in the management development program of INPI in order to provide the organization with capability to deal with changes and the new requires in the Intellectual Property system.

Method

It was used the Organizational Climate Questionnaire applied by Great Place to Work Institute (2009) and Work Values Questionnaire (Elizur, 1994, adapted by Tchaicovsky, 1992). The Work Values Questionnaire is formed by 24 questions. These questions are divided in three modalities of work values (affective, cognitive and instrumental). The Organizational Climate Questionnaire was focused to know behavior, attitudes and feelings. It is formed by 56 questions, divides in five dimensions (respect, credibility, fairness, pride, camaraderie). The dimensions were structured to evaluate the confidence level in the organization. The approach is in the work relations, confidence, respect people and good communication.

The questionnaires were distributed to people of different levels and areas in the organization. The work values questionnaire was distributed to 25 voluntary professionals of MDP group. The Organizational Climate Questionnaire was distributed to 377 voluntary professionals.

The response was voluntary and without identification. Using data obtained from voluntary professionals it was examined their work values profile and compare with climate in the organizational context.

Sample: The sample is formed by a group of people which has participated in the first MDP and 377 voluntary people answered the questionnaires without identification. The sample profile is presented in Table 1 in which it was classified age in two categories (below and above 40 years), position in two categories (professionals and line managers), and areas divided in 3 broad categories (Administrative, Technology, Human Resource, Trademark & Patent and Presidency).

Table 1. Demographic description of INPI

Aspects	Categories	Sample %
Age	Below 40	40
	Above 40	60
Level	Professionals	90
	Manager level 1 & 2	10
Areas	Administrative, HR & IT	20
	Technology, Trademark & Patent	75
	Presidency	5

Table 2. Work Values in percentage for extremely positive answers

	Values/Categories	Modalities	%	Rank order
1	Achievement at Work	Cognitive	100	1
2	Improvements, Promotion opportunities	Cognitive	84	12
3	Benefits, Bonus	Instrumental	80	16
4	Pride in the Company	Cognitive	92	6
5	Contribution to Society	Cognitive	88	8
6	Convenient Hours of Work	Instrumental	60	20
7	Co-workers	Affective	84	12
8	Respect and Esteem	Affective	84	12
9	Feedback	Cognitive	96	4
10	Independence at Work	Cognitive	52	21
11	Influence in the Organization	Cognitive	40	23
12	Influence at Work	Cognitive	64	19
13	Interesting Job	Cognitive	92	6
14	Job Security	Instrumental	76	18
15	Job Status	Cognitive	16	24
16	Meaningful Work	Cognitive	84	12
17	Opportunities for Growth	Cognitive	88	8
18	Opportunities for Interaction	Affective	52	21
19	Adequate Salary	Instrumental	96	4
20	Recognition	Affective	88	8
21	Responsibility	Cognitive	88	8
22	Fair Supervisor	Affective	100	1
23	Use of Skills	Cognitive	100	1
24	Work Conditions	Instrumental	80	16

Table 3. Environment climate for ten extremely negative answers

	Questions	Dimension
1	Promotions are handed to those who most deserve them	Credibility
2	People avoid "politicking" in the workplace as a way to get results	Fairness
3	People are willing to make an extra effort to finish a job	Fairness
4	Our facilities promote a good working environment	Pride
5	Managers have a clear vision of where we are going and how to get there	Respect
6	Managers avoid favoritism	Credibility
7	Every employee has equal opportunities to receive recognition	Fairness
8	People like to come to work	Fairness
9	Managers keep me informed of important issues and about changes in the workplace	Pride
10	Managers involve people in the decisions that affect their activities and their workplace	Respect

Table 4. Great Place to Work Questionnaire

Dimension	No	Question
Credibility	1	Managers keep me informed of important issues and about changes in the workplace
	2	Managers make their expectations clear
	3	I can ask managers freely any reasonable questions and obtain straight answers
	4	Managers are approachable and easy to speak to
	5	Managers run the business competently
	6	Managers coordinate people
	7	Managers trust employees to do a good job without having to watch them all the time
	8	Managers give employees autonomy to do their jobs
	9	Managers have a clear vision of where we are going and how to get there
	10	Managers fulfill their promises
	11	Managers act in accordance with what they say
	12	I trust managers would use employee layoffs only as a last resource
	13	Managers run the business honestly and ethically
Respect	14	The company provides employees with training and development opportunities for my professional growth
	15	The company provides employees with the resources and equipment they need to get the work done
	16	Managers appreciate professional accomplishments and extra effort
	17	Unintentional mistakes are regarded as necessary to run the business
	18	Managers seek and respond to employees suggestions genuinely
	19	Managers involve people in the decisions that affect their activities and their workplace
	20	The workplace is both psychological and emotionally healthy
	21	This is a safe working environment
	22	Our facilities promote a good working environment

	23	The company allows me to take time off from work to address personal issues when it is necessary
	24	People are encouraged to reach a balance between their personal and professional lives
	25	Managers show a genuine interest in me as a person and not only as an employee
	26	We enjoy special benefits
Fairness	27	People are paid adequately for the job they do
	28	I believe the percentage I get in the profit sharing is fair
	29	Every employee has equal opportunities to receive recognition
	30	I am important regardless of my position in the company
	31	Promotions are handed to those who most deserve them
	32	Managers avoid favoritism
	33	People avoid "politicking" in the workplace as a way to get results
	34	People are treated equally regardless of their age
	35	People are treated equally regardless of their color or race
	36	People are treated equally regardless of their gender
Pride	37	People are treated equally regardless of their sexual orientation
	38	If I am treated unfairly, I trust I will be heard and will be given a fair treatment eventually
	39	I feel I make a difference
	40	My work has a special meaning. It is not "just another job" to me
	41	People are willing to make an extra effort to finish a job
	42	I feel proud of what we do
	43	I intend to work here for a long time
	44	I am proud to tell people where I work
	45	People like to come to work
	46	I feel good about the way we contribute to the community
Camaraderie	47	I can be myself
	48	We always celebrate special events
	49	People care about each other
	50	This is a hospitable workplace
	51	This is a friendly workplace
	52	You feel welcomed when you join the company
	53	Whenever people move to another area, the company promptly makes them feel "at home"
	54	The staff feels like a "team" or a "family"
	55	I feel we are all "in the same boat"
	56	People cooperate with each other

Discussion

This exploratory study shows that several changes have occurred in INPI in recent years. To deal with these challenges INPI has developed several actions in the human resources area.

Even though the sample size of work values study is not wide, combined with the organizational climate study both show important information. Initially, the organizational climate perceptions of the group analyzed concentrates the extremely negative answers in the fairness dimension (Table 3).

Analyzing the work values structure of the group (Table 2) it is possible to identify that cognitive modality dominates the initial positions in the rank order. On the other hand, the last positions in the rank order demonstrate more interactive values.

It is possible to observe that initial positions in the work values profile (Table 2) are conflicting with the extremely negative answers in the organizational climate study (Table 3). This information indicates that probably some policies and practices should be reviewed as way to improve the internal environment. The studies show that to know work values structure of people is probably a strategic action to get better results in the organization.

Based on the answers we observe that this study shows important elements to manage the organizational climate and the human resources policies. We also can see that some of them are aligned with the findings of the study developed in INPI - Managers Perception in a Changing Process in the Public Organization, presented in the 11th ISSOWV Conference (2008). The study showed that managers understand their role in the changing process but motivational aspects should be observed to allow a good fit between people and the new requirements to the organization.

In addition, the Leadership Behavior and Work Values in a Changing Environment study presented in the 12th ISSOWV Conference (2010) showed that work values and leadership behavior are important in a changing process.

Thus, the results of this work indicate that it is important to observe carefully the profile of work values and the organizational climate in order to have good results in the changing process. It is also important as way to align the policies and practices of human resources area in the organization.

Studies on leadership development, values, teamwork and changing process are important to support the human resource policies in the public administration. Other studies using validated instruments should be developed in order to attend the necessities of INPI.

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Transformation of civil servants' values in changing social environment

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Abstract

Due to its status, civil servant management activities constitute a comprehensive system of interpersonal relationships. Corporate culture has an impact on organizational development success, and it is frequently called a key driving factor.

Our analyses has shown that for civil service corporate culture it is typical to avoid conflicts, the leader has a considerable impact on the coordination of subordinates, business relationships can be subjective, duties distribution in the team is quite clear, etc.

The study has shown a need to harmonize values of civil servants and values of public service culture. Further studies may help to identify the influence of Russian corporate culture on the performance of civil servants.

Introduction

The current reforms in the Russian Federation result in considerable social, economic and cultural changes which directly influence every aspect of Russian society. These reforms are targeted at economy modernization, social capital development and educational system optimization. They have not only positive consequences like growth of individual life value but also negative effects such as deviations from typical behavioral standards and high culture traditions. The interview conducted among one hundred young students of Saint-Petersburg universities shows that the most of them found it hard to name a referent compatriot. Only two persons out of one hundred managed to name a successful referent peer, which demonstrates knowledge gaps in basic national culture values and ethical landmarks for youth self-realization (Sosnilo & Mayorova, 2013).

The changes of corporate values

The corporate values have also changed considerably. One can register a phenomenon of a culture shock: a person who is accustomed to operate in a certain corporate culture can be absolutely disoriented in a different organizational culture with different social and cultural values. Being used to an autocratic style when a word of the boss is a law, such person may face difficulties in adapting to a creative working environment when every employee can express his view and be listened to.

If we look at social and cultural characteristics of Russians in general using behavioral scale of G. Hofstede, on one hand there are traits that block any change, preclude from efficient mass production and impede self-organization; on the other hand there are traits which allow moving forward in some niches; so the key challenge is to turn the existing drawbacks into advantages (Figure 1, next page) (Auzan, 2013).

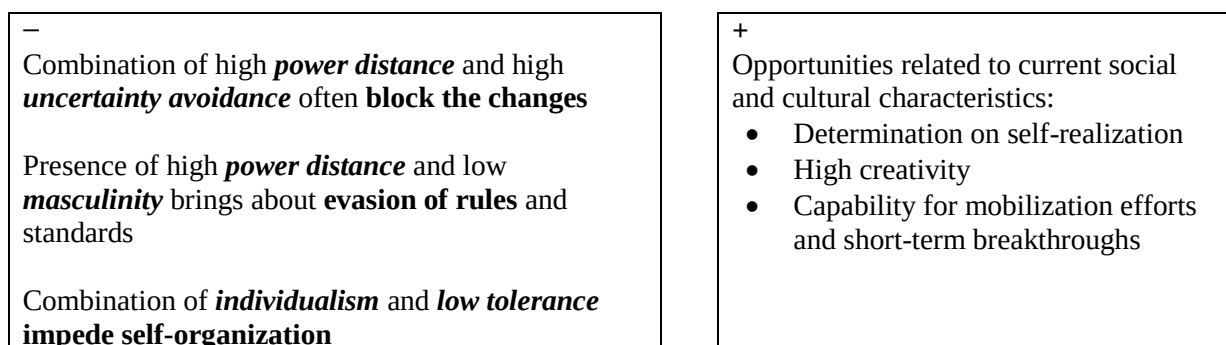


Figure 1. Threats and opportunities among social and cultural characteristics of Russians

For successful implementation of Russian reforms it is required to develop social capital based on shared values and sense of justice and related to society consolidation and high level of credibility to each other. The survey of the Center for Political technologies shows that the level of credibility in the Russian society leaves much to be desired (Table 1), although back in 1990 the interpersonal credibility index in RSFSR was much higher compared to the global one (Ivanov & Komarov & Pavlov & Rumjantsev, 2014). Later, due to transformation crisis, considerable changes have occurred in this index.

Table 1. Interpersonal credibility in the Russian society

Question	% of respondents
I can trust people in most cases	4
Usually I can trust people	30
Usually I am careful in interpersonal relationship	50
I am careful in interpersonal relationship in most cases	15
Don't know	1

The specialists reckon that soft corporate regulators, especially corporate culture and ethics, are powerful elements which in many cases provide for the sustainability of the system development.

Civil servant image

The values have transformed also in the system of civil service. The professional development of civil servants is drastically influenced by the following factors: unclear career development prospects, qualification gaps among immediate superiors, lack of skills upgrading opportunities, insufficient equipment of the work etc.

The challenge which is especially topical in the current environment is the development of civil servants professional competences. And this should be done keeping in mind that the key characteristic of the civil service is its direct link to the state and that the civil servant is a personification of the state for other citizens.

Several investigations on civil servant image demonstrate that it is not really high among the population, however the enrollment to the state and municipal management faculties is still growing and the social and professional status of the government officials remains to be quite high (Magomedov, 2001).

The sociological investigation of civil service organizational culture in the Russian Federation by V. Romanov has shown the following. The style of management in civil service is mainly characterized as autocratic and bureaucratic. 70% of the questioned civil servants have identified immediate superior orders as a key factor for their activities, every second respondent confessed that immediate superior orders are the only direction for them. At the same time, during civil service reform period a large part of civil servants consider that it is important to be professionally competent (85%) and to adopt socially desirable values, behavioral norms and rituals (35%) (Romanov, 2009). What characteristics should a modern governmental official have? The most important are work reliability, non-corruptness, honesty (Table 2) (Kashina & Vostrjakov, 2012).

This data demonstrates credibility deficiency issues and the need for social capital development.

Table 2. Qualities of an ideal modern Russian governmental official

№	Qualities	% of responds
1.	Honest, non-corruptive, reliable in work	50
2.	Law-abiding, high-minded, kind	20
3.	Close to people, takes care of people	15
4.	Smart, educated	14
5.	Responsible, committed	8
6.	Fair	8
7.	Experienced, competent, intelligent	6
8.	Patriotic	4
9.	Professional	4
10.	Hard-working, industrious	4
11.	Attentive, sympathetic	3
12.	Diligent, works well	3
13.	Decisive, determined	3
14.	Active	2
15.	Business-like	2

The civil service performance requirements are constantly rising. One of the ways to improve professional competences of the civil servants is to retrain them, i.e. to improve the social capital. The scientific report «Modernization issues: the role of the social capital» mentions that the social capital can be influenced through changing the characteristics of the educational system, because education is one of the crucial elements for civil culture growth (Ivanov & Komarov & Pavlov & Rumjantsev, 2014).

The investigation of topical challenges for self-government operation and development in the Russian Federation has demonstrated a need to improve the qualifications of state and municipal officials. The question, whether the knowledge they've got in the universities and colleges corresponds the requirements to the municipal officials, was answered by the respondents as follows (Figure 2) (Magomedov, 2012).

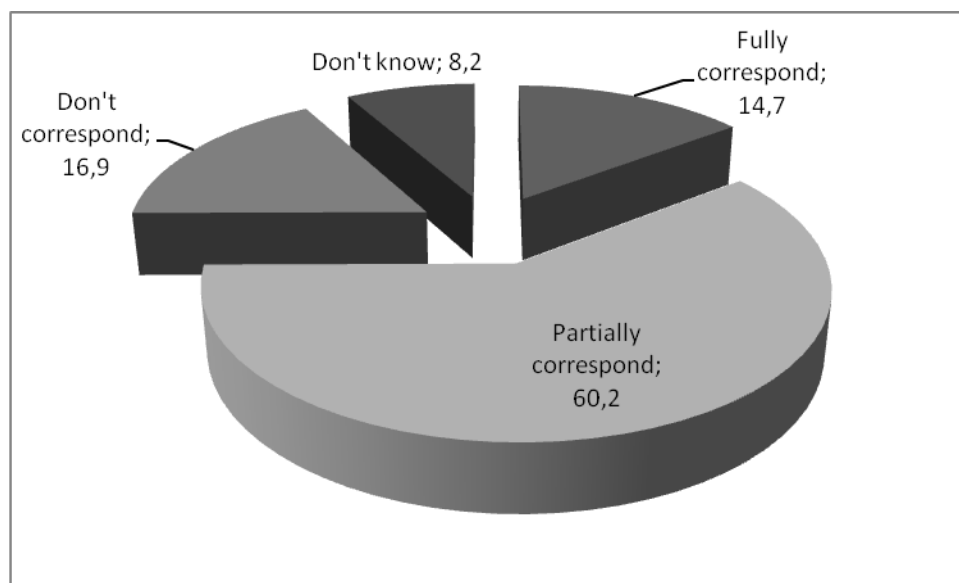


Figure 2. Estimation of primary professional skills corresponding to the municipal service requirements, %

Due to its status, civil servant management activities constitute a comprehensive system of interpersonal relationships. This system includes liaisons with the government when exercising the powers delegated to the civil servant, liaisons with the citizens when protecting their rights and legitimate interests and liaisons inside the professional group of civil servants. The administrative reform designed to improve the efficiency of the whole system, is impeded by rapid social changes which are ongoing in the society at the moment. Today *there is no any clear trustworthy concept of civil service improvement* but there are several studies which have identified impact factors. Among factors which influence the quality of public services are resources and management, namely, company corporate culture (Boyne, 2012). Corporate culture has an impact on organizational development success, and it is called a key driving factor more and more often (Barret, 2005/2006; Kim & Robert, 2001).

Organizational corporate culture values and employee's corporate competences

Since 2006, Pskov branch of RANEPa has been studying civil servants' system of values and public service organizational values. On stage one; we used questionnaires to study professional motives and stimuli of civil servants. The responds have shown that 65% (2005) and 64% (2011) of male officials are working for a material remuneration, those who are *committed to a task* stay in service longer compared to those who have other expectations from the civil service. The results of the study show transformations in civil servants' values: there is a decrease in the values of serving *society* and there is an increase in meeting *personal* goals, whereas general motivation for civil service has become stronger which can be explained by the influence of respondents' young age and short length of civil service (Seliverstov & Olekhovich, 2013).

These results show that it is requisite to develop organizational culture in civil service and its core value – to serve the state. The fact that civil service organizational culture can establish and develop values thus joining efforts of all structures is one of the first keys for efficient state management and social capital development.

On stage two; we used questionnaires to study values of civil service (Questionnaire *Company corporate culture*) (Shatalova, 2006). In this survey, organizational culture was considered as a source to form and develop civil servants' corporate values.

Some competences can be developed during training but for others it is more practical under superior's influence in real life. The first group of competences includes corporate competences which are, as a rule, more clear and laconic and they are designed to identify the worker with corporate values and corporate culture of the organization. Such competences include behavioral standards, i.e. business and personal qualities which shall be present in every employee of the organization. The study has covered the following areas:

1. Commitment to result. Identifies peculiarities and forms of goals and tasks planning and setting in the organization.
2. Team work and cooperation. Assesses work coordination level.
3. Information processing. Analyses information and documentation flows which show the level of organizational development.
4. Organizational behavior activation. Identifies methods and forms for organizational behavior activation, as well as correlation between rewards and penalties.
5. Organizational activity. Identifies control forms, correlation between normative and creative organizational trends, efficiency of organizational processes.
6. Openness to criticism. Measures organizational and managerial reactivity.
7. Organizational environment proneness to conflict. Studies social and psychological environment of the organization and its proneness to conflict.

Our survey was based on the correlation between employee's values and organizational culture values. The correlation between the organizational corporate culture values and employee's corporate competences is shown in table 3.

Table 3. Correlation between the organizational corporate culture values and employee's corporate competences

Cluster №	Corporate culture values	Cluster composition	Corporate competence
Cluster 1	Goal setting	Identifies peculiarities and forms of goals and tasks planning and setting in the organization	Commitment to result
Cluster 2	Coordination of activities	Identifies organizational structure, work coordination and its components efficiency	Coordination and business cooperation
Cluster 3	Information exchange	Analyses information and documentation flows which show the level of organizational development	Information processing
Cluster 4	Stimulation motivation system	Identifies methods and forms of organizational behavior activation, as well as correlation between rewarding and repressive stimulation	Labor motivation
Cluster 5	Organizational activity	Defines forms of control, correlation between normative and creative organizational trends, organizational processes efficiency	Team cooperation
Cluster 6	Organizational reactivity	Measures organizational and managerial reactivity	Openness to criticism
Cluster 7	Organizational environment proneness to conflict	Diagnoses the state of social and psychological environment in the organization and its conflictogenity level	Proneness to conflict

The processed results of the survey are provided in table 4.

Table 4. Corporate competence development level

Cluster №	Question №	Competence	Essence	Competence development level. Total index
Cluster 1	1-12	Commitment to result	Identifies peculiarities and forms of goals and tasks planning and setting in the organization	0,75
Cluster 2	13-25	Coordination and business cooperation	Identifies organizational structure, work coordination and its components efficiency	17,2
Cluster 3	26-50	Information processing	Analyses information and documentation flows which show the level of organizational development	7,23
Cluster 4	51-67	Labor motivation	Identifies methods and forms of organizational behavior activation, as well as correlation between rewarding and repressive stimulation	7,86
Cluster 5	68-88	Team cooperation	Defines forms of control, correlation between normative and creative organizational trends, organizational processes efficiency	- 4,29
Cluster 6	89-99	Openness to criticism	Measures organizational and managerial reactivity	5,89

We also studied organizational environment conflictogenity level. Questions in Cluster 7 allowed to diagnose the state of social and psychological environment in the organization and its conflictogenity level.

Table 5 shows the results of social and psychological organizational environment study. The results (total index is 34,6) demonstrate that there are conflicts and conflict situations in the organization.

Table 5. Organizational environment conflictogenity

Question №	Indicators correlation	Index	Total index
100 (1)	03-01+02	Unclear distribution of responsibilities among team members	34,6
100 (2)	03-01+02	Performing works which do not correspond the professional occupation	
100 (3)	03-01+02	Unclear tasks	
100 (4)	03-01+02	Incoherence in employees' activities	
100 (5)	03-01+02	Poor equipment in the company	

Review

The analysis of corporate competences has shown that the most developed competence is *Coordination and business cooperation* (17,2). High development of this competence can be explained through a considerable formalization (regulation) and hierarchy of organizational cooperation in civil service. The values of this culture are following formal rules and procedures, presence of clear control and accounting system. Civil and municipal servants

have a poorly developed competence of *Commitment to result* (0,75). But the lowest negative total index is for a corporate competence *Team cooperation* (-4,29). This competence reflects responsibility of the management for mistakes, objective investigation of the mistake grounds, need for innovation, and resistance to reforms etc.

These results allowed us to introduce alterations into the re-training curricula for civil and municipal servants paying more attention to such competences as *Team cooperation* and *Commitment to result*. The alterations were mainly related to the training methods in order to improve cooperation and reciprocity among students. We have emphasized the need for project case-study approaches in order to develop cooperation in the team and to improve students' commitment to result.

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Cross-cultural awareness and adaptation: A study of international students

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Abstract

This paper presents the results of a study designed to investigate the cross-cultural awareness and adaptation of international students at a Canadian university. The study has been initiated to explore the academic challenges and living experiences of international students moving from an Asian country like Bangladesh to a Western country like Canada. In recent years there has been a significant increase of foreign students in Canada and stories of student mental stress and failures have been reported on campuses of universities prompting this investigation. The study investigated the following four questions: 1. What kind of preparation and training the students received before they went to a foreign country? 2. How did they adapt to academic practices, life and culture that existed in a foreign country? 3. How did they perceive their own performance in dealing with their academic and personal situation in a foreign country? Results showed that students were insufficiently prepared for cultural adaptation and life style changes; they were mainly concerned with financial affordability, academic issues and employment opportunities in Canada. Only two thirds of the sample reported academic fulfillment, while only a third of the sample reported successful adaptation to culture and life style in Canada. Practical implications of the findings are discussed in the paper.

Introduction

Recent times have witnessed a great increase in the number of students who have been leaving their homeland to receive education in a foreign country so much so that international education has become a global business. Not only students have taken individual initiatives for higher education by enrolling themselves with foreign universities, universities themselves, mainly from Europe, Australia, and North America, have set up joint ventures and licensing type agreements with universities and colleges from Asia, Africa and Latin America to engage in a global education system. Many of these universities have vigorous recruitment initiatives to attract foreign students to their universities hoping to cash in from the global educational development.

While the spread of global education system could be considered a win-win situation for both students and the universities, stories of student failures and mal adaptation to a foreign education system and culture have been accumulating.

There is a growing body of research (Guo and Chase, 2011; Joy and Kolb, 2009; Adams, 2004; Fritz, Chin, and DeMarinis, 2008) that shows that we need to pay more attention to preparation of students before we send them abroad to receive higher education. Data released by the Association of Colleges and Universities of Canada (AUCC, 2011) show that there is a trend toward increasing number of foreign students coming to Canada in search of higher education and training. Similar trend is being observed in many other Western countries. The current study has been designed to further explore the issues concerning student adaptation to foreign educational system and culture. The study aims at providing information that will

assist students and university administrators alike to determine the measures that they have to undertake to achieve success in international education.

Research objectives

The main objectives of the study were the following: a) Provide an outline of academic preparation and cross-cultural awareness training received by the foreign students **before** arrival to the host educational institution; b) To provide an account of academic challenges and living experiences of the foreign students **after** arriving in the host institution; c) To find how students dealt with academic challenges and cultural differences; d) To determine what the students and their host educational institutions could do so that the students may achieve their goals and have a smooth transition from one culture to another. Data concerning preparation for studies in a foreign country, living experiences and performance after arrival in the foreign land were collected by a survey of university students.

Literature Review

A recent study conducted by Uddin (2010) undertook a review of literature showing that past research on international students have focused upon three issues: a) patterns of differences in classroom training because of cross-cultural multiplicity; b) nature and type of challenges encountered by international students; and c) the solutions or guidelines for overcoming the challenges. The following review will concentrate on the three issues identified by Uddin (2010).

Learning, life style, and cultural issues

According to Neri & Ville (2008), international students are confronted with many challenges upon their arrival in a host educational institution in a foreign country. They have to frequently meet with a diverse set of behavioural practices of people, a foreign language, new academic institutions, new rules and unfamiliar natural environment and climate. They have to deal with these challenges to become successful in academic performance and life style adaptation. It is not an easy task for most of the international students to adjust with the new culture and academic environment of the host country.

On the subject of patterns of class room differences in education and training, several studies have been conducted in the past. Omeri, Malcolm, Ahern & Wellington (2003) reviewed a number of research studies that deal with educational strategies to enhance teaching and learning situations in diverse cultural environments. They made the assertions that several factors including divergent teaching and learning styles at the host university, homesickness, lacking family contacts, and financial concerns impact upon the performance of international students at the host educational institutions and limit their participation within the university culture. Pratt (1991) carried out a comparative study of self-conceptions between Chinese and Western societies and he identified that learning styles may be distinguishable across different cultures. Lebcir, Wells & Bond (2008) conducted a study of international students in a British university and found that the presentation style of teacher is a strong factor to help international students understanding the subject. The study clearly indicated that international students have different abilities and strengths, but they depend on their teacher's ability to deliver and explain the material to understand the subject in a multicultural class setting. In addition, international students face difficulty in understanding lectures that are not well structured and integrated. In an experiment conducted in Australia, researchers found that

interaction with international students during tutorials and seminars had a positive impact on their academic performance (Adams, 2004). Asian students are found to be more quiet and reflective in the extroverted, high participation American classroom. Similarly, in organizations, workers from different cultures exhibit different styles of work and problem solving approach than other cultures (Joy & Kolb, 2009).

Worldwide migration and differing cultural trends have given rise to an increased multi-cultural mix of students and teachers in academic settings. These trends have created new challenges for students and university teachers as well. A greater percentage of international students represent a variety of culturally and linguistically diverse backgrounds. Some of these students could be considered disadvantaged in ability to attain success in their studies (Omeri et al. 2003).

International students face different kinds of challenges and hardships in coping with the new environment like difficulties with language, making new friends, and covering finances etc. (Jung, Hecht & Chapman, 2007). Loneliness is a common experience for most international students. As they are typically removed from their usual social support systems when they study abroad, they may feel as though they have few people on whom they can rely for support. They may also feel detached from the community around them which may lead to the symptoms of anxiety and depression among them (Blai, 1989).

Hunley (2009) found that international students who were experiencing more psychological distress and more loneliness demonstrated lower levels of functioning during the period of studying abroad. The study found that higher levels of psychological distress and loneliness were associated with poorer functioning of students.

Mori (2000) identified lack of mastery of second language as one of the major barriers for most of the international students on the way of their academic success. In a qualitative study of twelve international students studying in a Canadian university, Myles & Cheng (2003) identified that, in addition to language barriers, many international students have their personal challenges like finances, family support; psychosocial issues like making new friends, loneliness, loss of social status, managing their workload and having adequate academic background in their areas of specialization etc. Lee (2009) conducted a qualitative study on six Korean students (three masters and three doctoral students) in the US and found that the students' perceptions of their language level, differences in socio-cultural values, educational practices, individual differences, and the classroom context were intertwined and influenced the oral classroom participation.

Neri and Ville (2008) conducted a survey of one hundred seventy three international students in Australia investigating the degree to which international students renew their social networks affected by the process of migration, and how the process impacts upon the well-being and academic performance. The findings from the study were consistent with theories of culture shock. The study found that students experienced relative unhappiness and disorientation on arrival from their home country. In a study of Chinese students studying at British universities, Lu (1990) found that the experience of homesickness of students was stable throughout the study. The other psychological symptoms existed more during early in the study abroad experience and then decreased over time. Students who are from cultures considered to be quite different from that of their host country should experience more stress; but studies have also found evidence of stress while studying abroad despite the similarity of their culture of origin to that of the host country. Ryan & Twibell (2000) identified emotional

difficulties of international students like anxiety, depression, loneliness, and found that those emotional difficulties adversely affected students' activity on campus. Research showed that there are linkages between psychological stress of international students with decreased activity level and the possibility that psychological stress can limit or deteriorate students' experiences.

Coping with difficulties in learning

Scholars have offered many suggestions for international students on the subject of coping mechanisms for dealing with the challenges they face in international educational environment. Mulligan & Kirkpatrick (2000) made the following suggestions for making class room learning more effective: provide an outline of the lecture at the beginning and refer back to it throughout the lecture; provide detailed notes of lecture content; use clear and concise overhead transparencies and other visual aids; speak clearly and at a reasonable pace; clearly signal change in topic etc. Wright (2010) stated that when training is conducted on the people of other cultures, it is critical for the trainers to recognize and be aware of the learning and training styles. For effective training, the author suggested that trainers should be using easy language avoiding jargons. Being aware of trainer's postures, if it is in line with the practice of trainee's culture, showing respect to the trainee's religion and beliefs, being flexible and adaptable with the customs and culture of the trainees etc. make training effective in a divergent cultural environment.

Marquart (2007) provided some suggestions for making the classroom training more effective. The author suggested the following: a) instructors should use different kinds of learning styles appropriate to the classroom environment; b) involve students as active participants in class room activities; and c) encourage team work etc. Lee (2009) proposed that universities should organize speaking and writing classes for graduate students and provide classes designed to introduce the host institution culture to new international students. Furthermore, international students should be trained in classroom discourse skills as well as the dynamics of classroom participation to assist them perform effectively. As international students may underestimate their oral proficiency and that they fear how their professors and classmates will evaluate their performance, it would be helpful for such classes to explicitly address issues related to foreign language learning anxiety. In this case, individual instructor can help international students in active participation in class discussion. The attitude of instructor is important in developing a comfortable learning environment where students can more easily present opinions and ask questions. Neri & Ville (2008) identified that as a means of coping with the new environment, many international students managed to establish a circle of friends and became happier over time although some of them failed even to connect with the university community. Many international students also developed social networks with club membership and managed their financial constraints by undertaking paid employment.

Methodology

A literature review was conducted to find out the "state of the art" in global educational development. Articles published on the subject of academic and personal experiences of international students in the Western countries were analyzed. The next step in the research project was to collect data by conducting a survey of a sample of international students from Bangladesh studying in a Canadian university. A focus group discussion over issues of

preparation for study abroad and coping with emergent situation at the host university was conducted with a small sample of students. Students met and discussed academic and life style issues that were of concern to them.

Following the focus group discussions, a survey instrument entitled, “Investigating Factors that Lead to Successful Adaptation and Efficient Performance of Foreign Students in Canada” was developed. The instrument went through approval process by the University Ethics Committee and was given approval by the Committee. The questionnaire was pilot tested with a different group of Bangladeshi students to verify meaningfulness and face validity of the questionnaire. Based upon the pilot testing, the questionnaire was further modified. The questionnaire had four sections: a) Demographic information; b) Preparation for study in Canada before arrival; c) Adapting to the culture, life style and education in Canada; d) Perceived academic and personal goal attainments. The questionnaire was put in the Internet and letters of invitation to participate were sent out to sixty-seven students selected randomly from a list of Bangladeshi students studying at the host university. Only forty-seven students completed the survey (Response rate 70.1%). As stated previously, the survey was designed to discern the following aspects of student experiences: a) amount and type of preparation undertaken **before** coming to Canada; b) Measures undertaken **after** arrival for adaptation to the culture, lifestyle and education in Canada; and c) Perceived success in adaptation to Canadian education system.

An analysis of demographic characteristics of respondents revealed the following: male 66.2% and females, 33.8%; mean age of the respondents was 24.3 years old; as expected majority of the respondents were single (83.1%) and only 16.9% were married; majority were from professional schools of engineering, business, education, and social work. The sample could be regarded as fairly representative of university students in Canada.

Findings

Preparation for study abroad: There were six items in the questionnaire that enquired about the type and amount of preparation undertaken by the respondents before coming to their host university in Canada. Analysis revealed the following: Rated on a five point Likert-type scales the amount of preparation undertaken by the students before coming to Canada were a sufficient amount only on three aspects such as financial affordability (mean score 3.5), academics (3.4), and employment opportunities (3.1) Very little or no preparation were undertaken with regard to cultural and life style adaptation, features of the new culture, and language barrier. In the choice of the host educational institution, tuition fees, quality of education, and prestige of the host institution in that order were considered to be the most popular factors. Students rated the amount of support they received for study abroad in the following way: parents (4.4), friends (3.8), academic advisors in the home country (3.5), academic institutions in the home country (3.6), peers (3.3), and government in the home country (2.6). Students rated the sufficiency of preparation undertaken by them for study abroad in the following way: More than sufficient (22.4%), sufficient (44.9%), did not take any extra preparation (12.2%), insufficient to a certain extent (18.4%) and insufficient (2%). The data could be interpreted to mean that students were fairly satisfied with their preparation, despite the fact that they lacked preparation in certain areas.

Adapting to the culture, life style and education in Canada

Six items in the questionnaire concerned adaptation of students to the culture, life style and education in Canada. On the question of similarity between Canadian and home country culture, students perceived the similarity between the two cultures in the following way: Very similar (4.2%), Similar (14.6%), somewhat similar (41.7%) and Not similar at all (39.6%). The data appears to show that students correctly perceived the dissimilarity between Canadian and home country cultures of Bangladeshi students.

Students were asked to rate the degree to which they identified with home and host country cultures. Analysis of the responses revealed the following results: High in both home and host country cultures (26.1%), High in home and low in host country cultures (32.6%), High in host and low in home cultures (2.2%), Low in both home and host country cultures (6.5%), Equal in identification with both cultures (32.8%). The results appear to indicate that students were moving towards identification with the host country culture; however. A third of the sample still strongly identified with the home country culture.

How did the host university help the transition process for the international students? Did the university undertake sufficient initiative to help students deal with their transition issues? The following findings were obtained from analysis of responses: Not at all (4%), were they indifferent (3%), there is potential for improvement (48.9%), The University took initiatives to some extent (26.7%), they are providing sufficient assistance (8.9%). The students appear to be dissatisfied with the university services provided for transition.

Notwithstanding the expression by students for more assistance for the transition process, respondents were asked to rate the degree of their satisfaction with a number of campus facilities and services. On a five point Likert-type scales, the scores for the facilities and services were as follows: Campus facilities (3.5), In-class facilities (3.4), campus security (3.7), campus environment (3.7), library resources (3.9), Faculty resources (3.6), International Student's Office (3.8). The results suggest that students were reasonably satisfied with the facilities and services, and this could assist students adapt better to the host university. However, there is a good deal of improvements that could be made by the university for international students.

Students were asked to rate on a five point scale factors that affected their personal goal attainments. Results showed the following: Learning the culture (3.6), Coping with mental stress (3.2), Financial constraints (2.9), Academic challenges (3.6), Language barrier (3.4), social challenges (3.5), Residence (2.9), employment opportunities (2.9), Environment (3.3), State of health (3.4), Homesickness (2.7), Overall condition of the university (3.7), Changes in immigration policies (3.5), Possible social discrimination (2.8), academic and professional discrimination (2.8), Adjusting to New Life Style (3.4). It should be noticed that the respondents rated the importance of social, cultural, academic challenges as significant factors in their adaptation process.

Perceived Success in adaptation and personal goal attainment

On the question of adjustment to living in Canada to date, international students responded in the following way: Worse than when I first came here (8.9%), I need more time and experience to adjust (4.4%), Adjustment was never a concerning issue for me (17.8%), I am doing better than when I came here first (36.6%), I have managed to adjust completely in

Canada (33.3%). The results suggest that one third of the sample have been successful in adapting to living in Canada, while the rest have been struggling their way through.

The respondents were asked to rate their perceived success in their personal goal attainment. They rated their success in the following way: Very successful (6.5%), Successful (30.4%), Fairly successful, (30.4%), I would not assess myself yet (23.9%), I am yet to reach a level of success (4.3%), Not successful at all (4.3%). The results seem to indicate that two thirds of the sample consider themselves fairly successful, while a third have been struggling to attain their goals.

Discussion and conclusion

Past research indicate that students usually do not receive sufficient amount of exposure to cultural and life style adjustment issues. There is similar evidence of unpreparedness available in the international human resource management literature. Host educational institutions in their recruitment of foreign students ignore cultural adaptation issues. International students themselves did not recognize adaptation issues. The following practical implications could be drawn from the study: Students should be made aware of the academic, cultural and life style adaptation issues before they come to Canada. A stronger role should be played by educational institutions for the recruitment and retention of foreign students. The authors believe that recruitment of students from abroad should follow the principle of “Realistic Job Previews” as developed by Wanous (1975). Students should be oriented to the potential benefits as well as challenges of education abroad.

Limitations: While the current study was worthwhile, and added to our knowledge about performance and adaptation issues for international students, we need to refine our research methodology by including a larger sample of subjects from other universities in Canada. Also, students from many different countries need to be studied. Reliability and validity of survey instruments need to be determined. We also need to build a comprehensive conceptual framework. As the study did not specifically differentiate between undergraduate and graduate students, or between young or mature students, it is expected that further segmentation of student population along these groups will improve the understanding of the issues of cross-cultural differences in class room training and relevant challenges for international students. We have started working on the issues identified in this paper and recommend future research by others.

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Promoting training and skill development for international employability: The motivations of Erasmus' students in the field of management

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Abstract

The main aims of our work were to analyse incoming Erasmus students' motivations for the programme and the competences they expect to develop. Using an open question questionnaire students were asked why they chose Portugal, the School and the subject and what experiences and competences they expected to develop. Our key findings were that Erasmus students chose Portugal mainly for cultural characteristics and weather and the school because it offers courses in English. The main expectations of students are to improve their English, have a culturally enriching experience and, also, become independent and self-confident. As to the subject, students expect to develop a set of competences related to understanding people and organisations in multi-cultural environments that enhances their potential as managers that aim to work in large companies.

Introduction

Founded in 1987 with the purpose to provide foreign exchange options for higher education students within the EU, Erasmus has become the most widespread and successful short-term students' mobility programme in Europe. Aimed at enhancing cooperation among the higher level education institutions of the different member states, Erasmus is also viewed as a means to foster the convergence and competitiveness of the European Higher Level Education System as recommended by the Bologna Declaration (1999). As to Erasmus students, on the overall most are highly satisfied with their participation in the programme. Though perceiving their academic achievement as essential, students' main motivations to study abroad are to gain a cultural experience, improve their language skills and/or proficiency and the opportunity, for some, to study in a high quality academic institution. Despite some differences between students from different regions of the EU, in their experience abroad students consider competences related to human and social interaction as more important and the ones that they develop in a higher level during their period abroad. Whereas, mathematical and competences related to science and technology are by comparison considered less important and less developed during their stay abroad. Communication in foreign languages and communication in mother tongue are the key competences of lifelong learning that students consider both the most important and the most developed during their stay abroad. Social and civic competences come second in order of importance but as to the level of development this "type" of competences comes third being preceded by sense of initiative and entrepreneurship competences. Students' motivation and experience abroad are also shaped by the academic environment and more specific by the degree of contrast between the home and the host country. Students have more valuable experiences when there are some contrasts, not too large and not too small, between the home and host country in what concerns courses, teaching methods, as well as cultural environment.

Bearing that Portugal is considered a good importer and exporter of Erasmus students (Breznik et al., 2013) and that in spite of the growing interest of academic in students'

mobility there are very few studies about Erasmus incoming students in Portugal, the main aims of this study were to understand Erasmus incoming students' motivations and their expectations as far as the competences they will develop during their stay. In order to achieve our aims we carried a qualitative type exploratory study using a five open question questionnaire that was applied in two subjects, taught in English, over a period of two years (four semesters), followed by content analysis.

We structure the paper as follows. First, we discuss briefly the Erasmus programme, focusing on the motivations and competences it enhances. Second, we describe and justify the methodology we use. Third, we present our results and, fourth, the main conclusions.

Brief overview of the Erasmus Programme: framework and perceptions

The Erasmus Programme is an EU student exchange programme. It was founded in 1987 with the purpose to provide foreign exchange options for higher education students within the European Union. Erasmus is funded by most EU member nations (37 countries), and, according to the European Commission (2014), it has become the most successful student exchange programme in the world. Since 1987 close to 3 million students have participated, as well as over 300 000 teachers and education staff since 1997 when the programme was extended to academic staff. In 2007 the Programme has become part of the EU's Lifelong Learning Programme covering new areas such as student placements in enterprises, university staff training and teaching for business staff.

Erasmus mobility has grown considerably in the last decades. Aimed at cross-border cooperation between states to aid the growth of international studying, Erasmus can be viewed not lonely as a means to enhance cooperation among the higher level education institutions of the different states, but also as a means to enhance the convergence and competitiveness of the European Higher Level Education System as recommended by the Bologna Declaration (1999). It has been stimulated for the purposes of academic enhancement, cultural enrichment and improvement of foreign language proficiency (Rivza and Teichler, 2007). According to available information, over 230 thousand students study abroad through Erasmus and over 4000 students can be involved at any one time in the programme. Students can choose the length of time they stay abroad with a minimum of three months recognised as the qualifying period (http://www.erasmusprogramme.com/the_erasmus.php). Embedded in the aims of the Declaration of Bologna (1999), that promotes the adoption of two main cycles, a system of easily readable and comparable degrees and a system of credits, Erasmus has become the most widespread short-term mobility programme in the EU. Considering that short-term mobility works best if the mobility is "horizontal", that is, if there is similarity between home and host country in what concerns quality of study programmes and level of students' competences (Rivza and Teichler, 2007), Erasmus has also become a strong promoter of this type of mobility.

Regardless of the criticism about the excessive bureaucratic procedures, most participating students showed that they were highly satisfied with the Erasmus experience (Rivza and Teichler, 2007). Students' motivation to study abroad corroborates what is quoted by experts, namely academic, cultural, linguistic and professional enhancement, combined with an interest for extracurricular activities during this period. To gain cultural experience comes up as the main reason to study abroad, as well as the improvement of foreign language skills, and the opportunity to study in high quality academic environments. The latter is particularly

important for students from new EU member states (Pietro and Page, 2008). And, last but not least it's also viewed as a means as to improve career prospects and good understanding of the host country (Teichler, 2004).

About a third of the Erasmus students studied abroad during their second year and more than two thirds take exclusively or predominantly classes in foreign languages while studying abroad (Teichler, 2004). Language proficiency is one of the factors that students take into consideration when they choose the host country, as most institutions participating in the programme expect incoming students to be acquainted with the language of the country, and in some cases incoming students study alongside home country students and not in specific courses designed for them (Teichler, 2004). Some countries, for example Portugal, offer courses in their mother tongue to give students the opportunity to develop their skills and to facilitate their inception. Apart from their language skills or proficiency, students take into consideration a number of factors when they choose their host country, such as (Teichler, 2004): the reputation of the institution in a specialised field; the attractiveness of the city or town, which can either be big well-known city or a small traditional university town; the vacation value of the host country, that is the climate (one of the reasons students prefer Southern European countries). It is noteworthy, that notwithstanding academic achievement being an important issue for students, what they want is to have culturally rich and valuable linguistic experiences (to meet people, to travel, etc.). Also noteworthy is the fact that although Erasmus implicitly assumes students "free choice" some students have to pass a selection process in order to be accepted for the programme. This selection is done on the basis of academic achievement, foreign language proficiency, motivation and personality (Teichler, 2004).

In what concerns the study experience abroad, as above mentioned, most students consider it a valuable, eye-opening and horizon-broadening experience (Teichler, 2004). The main contribution for these experiences appears to be the contrast in academic paradigms, teaching methods and learning communication styles combined with different daily challenges and cultural environment (Teichler, 2004). However, the best experiences occur when contrast between home and host country are not too substantial and not too small (Teichler, 2004). As far as competences, studies have shown that Erasmus students are better in what concerns "international competences" than non-mobile students and they are more likely to get jobs that involve international assignments (Bracht et al., 2006). Nevertheless, it worth mentioning, that the impact of short-term mobility leading to more international work is diminishing over the years (Bracht et al., 2006; Rivza and Teichler, 2007) this can be explained by two factors (Rivza and Teichler, 2007): short-term mobility has expanded more rapidly than competences demand in this field; international experiences and learning are widespread through globalization and internalization of the European society.

Studies also show that while Erasmus has a positive influence on the development of the eight key competences for lifelong learning¹ (Kumpikaitė and Duoba, 2013; Vaicekauskas et al., 2013), there appear to be some differences between what students consider as important competences and what they consider the level of development of these competences during their period of study abroad. Students consider more important and that they develop more

¹ The eight key competences for lifelong learning presented in the "Recommendation of the European Parliament and of the Council of the European Union on 18 December 2006" (Official Journal of the European Union, 30.12.2006) are : 1) Communication in the mother tongue; 2) Communication in foreign languages; 3) Mathematical competence and basic competences in science and technology; 4) Digital competence; 5) Learning to learn; 6) Social and civic competences; 7) Sense of initiative and entrepreneurship; and 8) Cultural awareness and expression.

“human and social interaction” competences than mathematical and basic competences in science and technology. Communication competences, both in foreign language and in mother tongue, are considered as the most important and most developed competences by Erasmus students (Vaicekauskas et al., 2013). Nevertheless, when comparing the importance with the perception of development of the other seven key competences, Vaicekauskas et al. (2013) found some significant differences. Whereas, students consider as second most important competence, with very low variation, social and civic competences and as third most important learning to learn, when asked about the level of development students consider that the second most developed competence is sense of initiative and entrepreneurship followed, in third place, by social and civic competences. The difference between importance and level of development, particularly in what concerns the sense of initiative and entrepreneurship, might be explained by the challenges students face during their experience abroad, some of which are due to a certain lack of time in preparing their stay (Vaicekauskas et al., 2013; Teichler, 2004). It’s also worth mentioning that mathematical and basic competences in science and technology were considered, as a whole, the least important and least developed competences (Vaicekauskas et al., 2013). The authors also found differences when they compared the perceptions of students from different regions. Eastern European students consider social and civic competences to be more important. Whereas students of other regions consider communication in foreign languages to be more important, and in Western and Southern European students even consider communication in mother tongue to be more important than social and civic competences. Although they don’t rank it at the top, Western and Southern European students also rank entrepreneurship and sense of initiative better than students from other regions (fifth place). Still, according to Vaicekauskas et al. (2013) study, Southern European students rank better learning to learn than students from other regions, placing it in the third place whereas in other regions it comes in fourth and fifth place.

Methodology

The main aims of our work were to analyse incoming Erasmus students’ motivations and the competences they expected to develop during their studying period in Portugal. As teachers of mobility (incoming and outgoing) students, our aims stem from the need to have a better understanding of what stimulates students to study abroad and what they hope to achieve with their experience. Despite its growing interest as a field of study and a measure of “institutional quality”, studies about Erasmus students (incoming and outgoing) in Portugal are still scarce. Therefore, we decided to do a qualitative type exploratory study using a five open question questionnaire that also included the sociographic description of students. Students were asked the following: why they chose Portugal and the School, what they were expecting from their experience, as a whole, abroad, their personal and professional expectations as far as Erasmus, why they chose the subject and what competences they expected to develop in the subject. The questionnaire was applied at the beginning of each semester in two subjects, namely, People in Organisations and Managing People at Work over a period of two years. We received a total of 85 responses and content analysis was carried out. The above-mentioned subjects are aimed at the development of personal, managerial and cultural skills and are taught by two teachers that are present in class at the same time in order to create new teaching dynamics and enhance participation and discussion. These subjects are part of the plan of studies of the International Module that the School has created for Erasmus incoming students. The International Module consists of about 24 subjects, 12 for each semester, which include Portuguese Language and Culture (two semesters) and English for Professionals (two semesters). All the other subjects are taught in English. Most of the

subjects are part of the curricula of the school's courses and others, like the above-mentioned, were created specifically for Erasmus incoming students. People in Organisations and Managing People at Work are in each semester the second subject with the highest number of students enrolled (approximately an average of 25 students per semester).

Results

As to their sociographic profile, most respondents are female (71%), young (between 20 and 25 years) and have successful education trajectories. The differences in gender participating in this research appears to both the differences in gender in higher education as well as the differences in Erasmus students' mobility in general and in particular in Erasmus incoming students in Portugal (Cfr., <http://www.statisticsforall.eu/maps-erasmus-students.php>). As to their country of citizen (hip, or home country, most respondents are from Eastern Europe (51%) and Western Europe (26%). The rest are from Southern Europe (11%), Northern Europe (7%) and other countries, namely Turkey and Brazil (5%). The percentage of students from Southern Europe, in this specific case, Spain, seems not to support the tendency for students to study in neighbouring countries as referred by Rivza and Teichler (2007), which could lead us to hypothesise that it is due to the perception of small cultural contrast and language proficiency (the subjects are in English). Analysing the responses by country, we find that the respondents are mainly from Poland (28, 4%), Czech Republic (16,4%) and Spain (10,5%), followed by the Netherlands (9,4%) and Belgium (9,4%). The higher percentage of respondents from Eastern Europe appears to be supported by the strong formal relationship and signed agreements between the host institution and institutions in these countries (www.ips.pt).

The results show that 87% of respondents are 1st cycle students - Bachelor (3 years) or a Degree (4 years) – and about 13% are Master students. When analysing the 1st cycle students by school year, we find that 41, 9% are in their 3rd year, 33,8% in their 2nd year, followed by 24,3% in their 4th year (respondents from Eastern Europe and other countries). These results differ from what was found by Teichler (2004) and mentioned above that students usually go abroad in their 2nd year. As to the distribution of the respondents by course they are taking in their home institution, the results show a close relationship home and host institution courses. Most respondents are taking courses that are similar to the courses in the host country. The majority is taking courses in Business and Administration/ Economics (45,8%) and Finance and Accounting/ Management (15,2%), as well as Marketing/Tourism (12,9%), Logistics and Economics (8,2%) and HRM (2,3%), being the latter a Masters Course. All these courses cover the same scientific fields and have similar names to the courses of the host school. This similarity is expected and emerges as a consequence of the conditions of the learning agreement Erasmus students have to abide to in order to ensure that the subjects that they take in the host institution are recognised in their home institution. Even though the school offers an International module, specifically designed for the Erasmus students, this module reflects the scientific areas and the courses offered by the school to their home students. One the specificities showed by the distribution of respondents per course was the presence of 4,7% of respondents studying Engineering and 9,4% studying Management and Engineering. These students have enrolled in the International Module because the Engineering College, that is part of the same institution, doesn't offer similar courses in English, and some students decide to choose some subjects of the International Module.

As to one of the main aims of our study – why Erasmus incoming students choose Portugal and the school as host – the answers can be grouped into three main reasons, namely: reasons

connected with the characteristics of the Portuguese culture, reasons connected with the vacation characteristics of the country; and reasons connected to the role of the social influence during their decision making process about the choice of the host country. The first reason - characteristics of the Portuguese culture – described as the idea of exoticism of Portuguese culture, the beauty of the country and the friendly people appear as the main factors that influence the respondents choice, as quoted: “Because Portugal has a different culture/exotic / To know Portugal and the culture / I like Portugal because is an interesting/beautiful country / To know Portuguese language and culture / Friendly people / Discover a new country, new culture and new people”. The second reason – the vacation characteristics of the country –although it’s linked to the first reason, it is more connected with leisure, i.e., with the opportunity to travel, to enjoy good weather and the opportunities to enjoy the beaches, as mentioned by some respondents: “It’s an opportunity to travel / Because of the weather / Because is near the sea/ocean / Because of the beaches / Because is far from my country / Because is well located in Europe”. Considering most of the respondents are from Eastern European countries, this second reason appears to corroborate some of the reasons found by Teichler (2004) as to one of the reasons students have to choose Southern European countries. The third reason - the role of the social influence during their decision making process – is described as the influence of friends in their choice, quoting” “My friends recommended / I have friends from Portugal / It was my friends choice”.

If the reasons to choose the host country can in some way be related with the reason to choose the host institution, it is nevertheless possible to identify a set of reasons for specifically choosing the latter. For the respondents the main reason to choose the school was the fact that it had an International Module with subjects taught in English. The existence of an International Module where students of different countries attend the same class taught in English appears to create an enriching multicultural environment that enable the development of cultural awareness and competences, that is mentioned by some authors such as Vaicekauskas et al. (2013) and Teichler (2004), as some of the main purposes for students to join in the programme. One other reason, mentioned by respondents refers to the similarities between the home and the host academic institutions in what concerns the courses offered. This reason is presented by respondents to justify the subjects they have in the learning agreement and also as a way to guarantee the recognition of ECTS, as quoted by some respondents” “It’s a similar institution / Have similar subjects and course / Is part of my home course / My school recommended / Is the only choice”. But, not only the technical and administrative reasons are present in the respondents’ choice of institution but also the teaching methods used seem to be another reason for the choice of school, as mentioned by some respondents: “Because my friend has been here and said it was super / I heard from my friends that is a good school / My friends recommended”. The last reason or group of reasons, to choose the school mentioned by respondents is connected with its geographical location and the characteristics of the city in which it’s located, as some students mention: “It’s a nice city / It’s near Lisbon / It’s near my home”. The latter – the short distance from home – is mentioned by the Spanish students and it appears to reflect the neighbourhood “influence” mentioned before.

As to our second aim – what expectations and competences students expect to develop during their stay abroad - the results show that the respondents aim to develop communication competences, corroborating in part the study done by Vaicekauskas et al. (2013). The respondents aim to improve their “English language skills”, “learn the Portuguese language” and “learn other languages”. The improvement of their English proficiency and to learn Portuguese appear to be related with their enrolment in the International Module, which as

mentioned before includes English for Professionals as well as Portuguese Language and Culture. The aim to learn other languages appears to stem more from their relationship with students from different countries and/or the multicultural environment in and out of class. Another noteworthy expectation is connected with the importance of the “international experience” as a whole, which can be read in the following quotations: “Meet new people / It’s a good experience for my life / Meet people from other countries and cultures / Have an experience in other culture / Share experiences / Have a opened mind vision”. The sharing of experiences and contact with different and new people seem to reflect the “core principles” of the international experience, which is to be able to develop a new vision of the world and a new way to think life. These results as well the comments about the opportunity to enrich their CV and increase their professional opportunities corroborate studies mentioned before done by Brancht et al. (2006) and Rivza and Teichler (2007), amongst others. The respondents also show some expectations that can be connected with what we hereby will call “psychological characteristics”, and that can be described as a sense of confidence, independence, thus also initiative. These are mentioned as “I want to prove my independency... to learn more about my personality / Learn to be independent / To be more self-confident”. The vacation value of their stay also comes up as an expectation of the respondents, mentioned as “expect to travel / to have fun / (and) adventure”.

Analysis of the competences respondents expect to develop in the subject, namely in People in Organisations and/or Managing People at Work show that the responses can be categorized in three groups, namely: competences related to the content of this two subjects; competences related to the instrumental value of the subjects; and what can be related to the degree of familiarity or novelty of the subjects. The first category or type of expectation can be found when respondents mention they expect to “Learn more about persons in the organizations / I want to know the importance and role of each person in organizations / I want to know how to improve better cooperation at work / Understand people in organizations / How to work together in an organization / Learn about people”. These quotes appear to be a literal translation of the subjects syllabus. The second group of expectations is found in respondents answers where they mention the opportunity to “learn about management practices in different countries” and the usefulness for the students professional future “as a manager” or “for the working life” as a whole, as well as the expectation to improve their English. The third group of expectations - the degree of familiarity or novelty of the subject – refers to the fact that some students will choose the subject for its familiarity or similarity with other subjects they’ve had, as mentioned “it’s similar to (my) home courses”, while others will do it for the opposite reasons: “because is new for me”. Meaning that if the students have a positive expectation about the subjects the reasons why they choose the subjects can be very different from one student to another.

Conclusions

Our exploratory study on Erasmus incoming students’ motivations and the competences they expect to develop during their stay in Portugal reinforces that Erasmus is viewed by students as a means to enhance cultural, academic, linguistic and professional competences, corroborating what is emphasized by some recent studies in this field.

The reasons referred by students for choosing Portugal appear to be very similar to those mentioned in other studies for students to choose Southern European, and are associated with the exoticism of its culture and it’s vacation value due to the weather and the opportunity to enjoy the beaches. The other reason is the social influence, particular of friends, during their

decision making process when choosing a host country. As to the choice of school, even though the similarity between courses in home and host institution being important to guarantees them the recognition of their studies abroad, the main reason of choice appears to be the existence of an International Module with subjects taught in English. The International Module enables students to develop competences that they consider key during their stay abroad, namely communication competences, and more specifically the opportunity to improve their English, to learn Portuguese and other languages, as well as to enhance their knowledge of the Portuguese culture, as well as to interact in a multi-cultural environment in class. The choice of subject also reflects to a certain extent the competences students expect to develop during their Erasmus experience, namely their ability to understand people and organizations, specifically in multi-cultural environments, develop managerial skills that will contribute to enhance their CV and career opportunities, as well as improve their language proficiency.

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Chapter 3: Individual Performance

Personal and teamwork characteristics as factors affecting work satisfaction and personal performance

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Abstract

The purposes of the current study are to identify the different facets of the personal and the teamwork based resources, to suggest a model of antecedents affecting work satisfaction and personal success, and finally to empirically examine the proposed model.

An empirical examination was conducted among 1048 working students studying for an MBA in a computerized business simulation course which required forming teams.

The results supported the proposed model. The findings show that personal resources as skills, leadership and perceived contribution to the team have positive direct effect on personal performance while workload-project conflict has negative direct effect. Work satisfaction was found to have the highest positive effect on personal performance. Personality traits have positive effect on teamwork quality.

Introduction

The success of a person in teamwork projects relates not only to his or her skills and abilities but to a positive interdependency between the individual and its teammates. Teamwork is considered a better way to use employees' talent and an effective way for management to increase employees' motivation (Robbins and Judge, 2009). Studies have shown that implementation of team work can produce an increased employee satisfaction (Elloy, 2008) and increase performance and motivation (Cohen and Ledford, 1994). Harris and Harris (1996, p. 23) define teamwork as "A work group or unit with a common purpose through which members develop mutual relationships for the achievement of goals". Team members are expected to make decisions, take more responsibility and use their skills and knowledge to promote team success (Wageman, 1997; Johnson et al., 2000; Scarnati, 2001). Most studies deal with team performance and productivity (Sagoe, 1994) and with the right atmosphere management needed in order to create productive self-management, leadership, team work quality and team success (Hoegl and Gemuenden, 2001; Pearce and Manz, 2005; Elloy, 2008). However, only a few studies have dealt with individual achievements and success in this cooperative environment.

The purposes of the current study are to identify the different facets of the personal and the teamwork based resources, to suggest a model of antecedents affecting work satisfaction and personal success, and finally to empirically examine the proposed model.

The social interdependence theory well emphasizes the positive environment which might be created in quality teamwork. According to Johnson and Johnson (1999, p. 206), "social interdependence exists when individuals share common goals, each individual's outcome are affected by the actions of the others". The basic premise of social interdependence theory is that the way interdependence is structured determines how individual interact, which in turn determines the outcomes (Johnson et al., 1998). Team cooperation and interaction is a result of positive interdependence among individuals' goals. The idea of cooperation, of working together, is to maximize the individual and the other team members' performance and success.

Following the theme of social interdependence theory, we presume that teammate success in teamwork is composed of two major facets:

- 1) Teamwork based resources, which include the quality of the team, expressed in team members' abilities to cooperate, communicate and create mutual support among their teammates.
- 2) Person based resources, which include individual resources that can help him or her to cooperate in a team and contribute to team effort and performance.

Teamwork based resources

Good relationships among team members are essential to the mates' personal success. Good relationship is a result of positive interdependence among individuals. The idea is to be committed to work together and maximize the individual and the other team members' performance and success. Commitment to the team increases members' satisfaction with teammates and their willingness to help team members and improve team results (Bishop and Scott, 1997). Commitment and satisfaction creates a work environment where members are more involved in their project, have more interest in its success (Elmuti, 1996), and are more satisfied with their work (Wageman, 1997). Accordingly, we propose that a team member of a team with good collaborations will learn more, will be more satisfied and will exhibit higher personal performance and achievement.

The quality collaborations in work teams was conceptualized and constructed by Hoegl and Gemuenden (2001). They suggest a framework for quality collaborations, named Teamwork Quality (TWQ), and sees it as a multifaceted construct. The TWQ construct is assembled from six facets: communication, coordination, balance of member contributions, mutual support, effort and cohesion. Hoegl and Gemuenden (2001, p. 436) clarify that "the underlying proposition of this construct is that highly collaborative teams display behaviors related to all six Teamwork Quality facets. Thus, these six facets are indicators of the collaborative work process in teams and combine to the Teamwork Quality construct". The proposition here is that highly collaborative teams display behaviors related to all six TWQ facets (Hoegl and Parboteeah, 2006). Following the foundation of prior studies, Hoegl and Gemuenden (2001) suggested and empirically verified a framework displaying two separate paths from TWQ construct to project success. The paths were individual success and team performance. They found positive relationships between the quality of collaboration in teams and personal success of the team member, reflected in member's satisfaction and learning aspects. They also found positive relationships between the TWQ and team performance, reflected in the effectiveness and efficiency aspects. This relationship between TWQ and team performance was further treated and verified (Hoegl, Parboteeah and Gemuenden, 2003; Hoegl and Parboteeah, 2006).

In the current study, we apply to Hoegl and Gemuenden (2001) conceptual model and predict positive relationships among TWQ construct and the three expressions of the individual success, learning, work satisfaction and personal performance.

Person based resources

Motivation and Demotivation

Work motivation has important role in predicting worker behavior and job performance (Latham and Pinder, 2005). Motivation is an abstract concept; however, it can be defined as individual active participation and commitment to achieve required results (Halepota, 2005, p.14). Motivation reflects the individual forces which derive him or her toward work related

behavior and relates to the willingness to invest time and effort in work. In teamwork, members are motivated by personal considerations and by needs, goals and expectations of their teammates (Ellemers, De Gilder and Haslam, 2004). Furthermore, the motivation to achieve a collective performance is regarded as derived from individual concern and motives (Ilgen and Sheppard, 2001; Ellemers, De Gilder and Haslam, 2004). Therefore, we assume highly motivated team member will show higher personal performance.

The worker is also confronted with demotivating factors, which reduce the relative participation and commitment and cause the worker to be unmotivated. Here we treat the concept as *conflict of obligations*. The literature suggests some expressions of conflict of obligations. Established conflict is known as work-family conflict (WFC) or family-work conflict (FWC). This conflict is related to all workers; however, it is more common among parents who exhibit double career (Bakker et al., 2005). This conflict is created when both work and family are competing on the individual limited resources - time, energy and the like (Evans and Bartolome, 1986). WFC can be defined as a tension between two competing functions the individual is fulfilling as being a worker and a family person (Carlson et al., 2000). The conflict has an effect on worker work motivation, satisfaction and leads to decline in personal work performance. We propose that conflict of obligations negatively relate to personal performance.

Leadership

Leadership is more than just a role; it is a social process that requires team leadership from team members, as well as from the leader (Pearce et al., 2009). Team members are experiencing a self-leadership and shared leadership (Pearce and Manz, 2005). Moreover, in the internal dynamics within the team, sometimes there is an informal leader or leaders supported by members that are more dominant in decision making. Leadership incorporates intrinsic work motivation. Self and shared leadership might be leverage for greater effectiveness (Pearce and Manz, 2005). An employee that exhibits leadership is more motivated to achieve high collective performance and team success. This responsibility might motivate them to higher performance. Accordingly, we suggest that there is a positive correlation between individual motivation and personal performance in teamwork. Clearly, leadership involves responsibility and duty. Management and subordinates have high expectations from their leaders and thus formally appointed leaders are more motivated to achieve a higher performance level.

Individual Skills

Team member's visible skills and competence in performing a project task are treated as advantageous elements for personal and team success and each member would like to be recognized and rewarded for his or her competence and work. Therefore, though in teamwork there are team cooperate considerations and interdependence environment, the individual skill and advantages are well appreciated (Wageman, 1997; Johnson et al., 2000). Stashevsky and Koslowsky (2006) found that the specific knowledge of the project is a significant predictor of team performance. Accordingly, we propose that there is a positive correlation between the individual skills needed for the team project and the personal performance in teamwork.

Following the above arguments, we formulated the study's hypotheses:

- H1: There will be a positive correlation between TWQ and personal learning.
- H2: There will be a positive correlation between TWQ and personal satisfaction.
- H3: There will be a positive correlation between TWQ and personal performance.
- H4: There will be a positive relationship between Personal learning and personal performance.

- H5: There will be a positive relationship between Personal satisfaction and personal performance.
- H6: There will be a positive relationship between Personal learning and personal satisfaction.
- H7: There will be a positive correlation between motivation and personal performance.
- H8: There will be a negative correlation between conflict of obligations and personal performance.
- H9: There will be a positive correlation between appointed leader and personal performance.
- H10: There will be a positive correlation between expert and personal performance.

Method

Research Procedure

The research was performed using the Intopia B2B business simulation (Thorelli, Graves, & Lopez, 2005). The main objectives were to develop the managerial and strategic skills, by practicing the abilities to manage a virtual global firm, operating in several international markets. The MBA students were divided into teams of 5-7 students each. Each team represented the management of one firm that competed with other firms who operate in the dynamic hi-tech PC and chips industry. The business position is influenced by the industry (other firms in the simulation), by the macro environmental conditions in the different areas, and by global economy conditions. In this simulation, the team members serve as a management team responsible for improving the firm's short-term and long-term performance, to create a competitive advantage in the dynamic arena in which it operates. Besides participation in team effort, each team member was supposed to intensify his or her apparent contribution and performance, in order to increase personal grade.

Sample Characteristics

The sample consisted of 1048 graduate students, which were divided into 168 teams. Most of the participants were males (63%). Ages ranged between 22 and 55, with average age of 31. All participants were in their last year of an MBA program and 97% were working. Their specialization track in the MBA program was: finance (32%), marketing (26%), information systems (22%), and management and organizational behavior (20%). The family status of the participants was: 40% single, 60% married.

Measures

The study included three data sources. In the beginning of the simulation, each team was told to select a team manager, treated here as appointed leader. This nomination was the first data source. The second was a written questionnaire the team members were asked to fill in at the middle of the simulation. The items included TWQ construct variables that were adopted from Hoegl and Gemuenden (2001): communication, coordination, balance of member contributions, mutual support, effort, and cohesion; the personal success variables: learning and satisfaction; the perceived team performance: effectiveness aspect; and also demographic data and their specialization track in the MBA program. Since finance skills are advantages in the simulation, students specializing in finance were treated as experts. For motivation and conflict of obligation multiple original items were phrased to capture these constructs. Since teammate successful adaptation in team work relates to his or her personality, we add conscientiousness and agreeableness as exogenous variable. The items for these variables were taken from John et al. (1991) Big Five Inventory. The third data source was the students' actual performance that was measured as the students' final grade at the end of the simulation (composed from the team grade and the peer evaluation of each teammate).

Results

Internal reliability was checked and confirmed by Cronbach's alpha. The values for most of the variables are acceptable: communication, coordination, mutual support, cohesion, learning, satisfaction, motivation and conflict of obligations ranged from 0.70 to 0.91, confirming internal reliability for these scales. For balance of member contributions and effort the alphas were 0.57 and 0.55 respectively, close to reliability. According to Hoegl and Gemuenden (2001) the six facets of the TWQ pertain to the same latent construct, therefore they were put together in the study's model as observed variables to construct the TWQ latent variable.

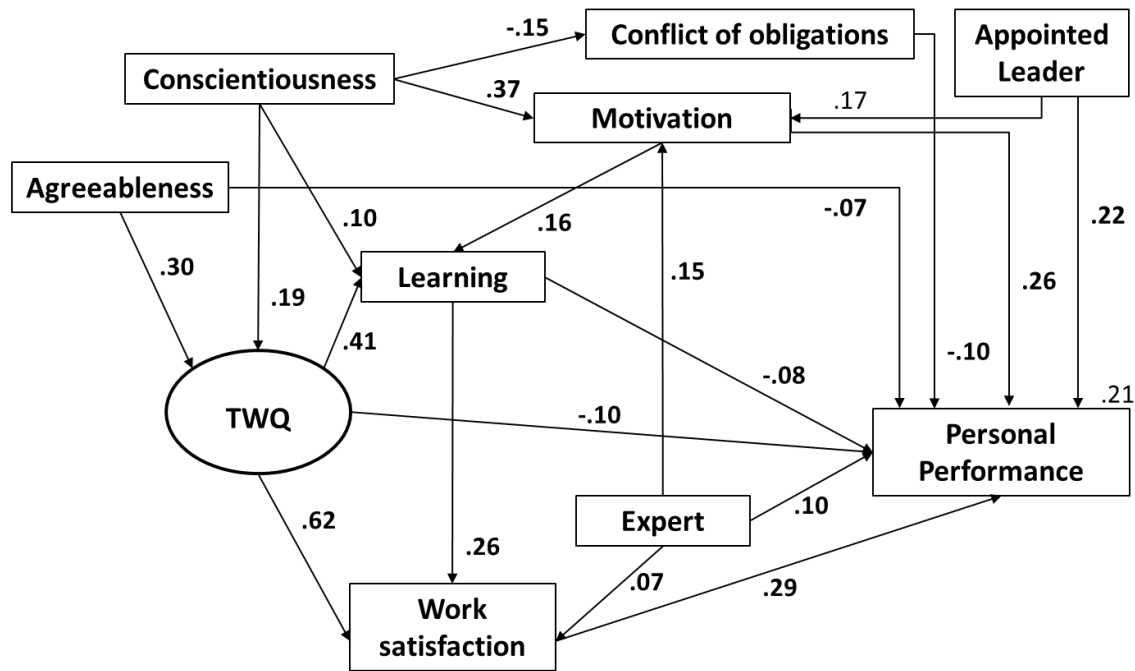
Then, path analysis was conducted using AMOS 21 and Structural Equation Modeling (SEM), based on the maximum likelihood approach (using the correlation matrixes of measurement of the variance, see Table 1) for model testing. The overall fit statistics (goodness of fit measures) exhibit an acceptable level of fit (χ^2 value (71/1048) = 148.57, $p < .05$; $\chi^2/Df < 3$; Comparative fit index (CFI) = .986; Normed Fit Index (NFI) = .974; Root mean square error of approximation (RMSEA) = .032), indicating that the path model is valid. The path model with the significant paths and the regression standardized coefficients are illustrated in Figure 1. The model demonstrates the variables' direct and indirect effects of TWQ on personal success. These model's total variables accounted for 21 % of the total variance of team performance.

Table 1. Descriptive Statistics and correlation coefficients of the study's variables

	Mean	Std. Dev.	1	2	3	4	5	6	7	8	9	10
1. TWQ	4.13	.54	1									
2. Work satisfaction	3.94	.85	.71**	1								
3. Learning	3.61	.96	.42**	.55**	1							
4. Motivation	3.88	.66	.10**	.15**	.25**	1						
5. Conflict of Obligations	3.86	.68	-.10**	-.07*	-.01	-.06	1					
6. Appointed leader	--	--	-.05	-.05	-.02	.19**	-.02	1				
7. Expert	--	--	-.01	.07*	.03	.17**	-.06*	.02	1			
8. Conscientiousness	4.22	.51	.28**	.22**	.28**	.38**	-.15**	.04	.06	1		
9. Agreeableness	4.09	.50	.35**	.30**	.23**	.11**	-.05	-.03	.03	.29**	1	
10. Personal performance	85.04	10.3	.07*	.20**	.08**	.33**	-.13*	.27**	.17**	.13**	-.01	1

Correlation is significant at: * 0.05 level; ** 0.01 level (2-tailed).

Figure 1. TWQ and Personal Success



The model shows that there are significant positive and direct relationships between TWQ and personal success variables, learning ($\beta = .41$) and work satisfaction ($\beta = .62$). Therefore, we accept hypotheses H1 and H2. However, though a positive low correlation displayed in Table 1 ($r = 0.07$), there is a significant negative and direct effect of TWQ on personal performance ($\beta = -.10$). The positive effect is not direct but indirect and through work satisfaction and learning ($\beta = .18$). Therefore, we reject H2. Furthermore, there is a direct positive relationship between work satisfaction and personal performance ($\beta = .29$); and positive relationship between learning and satisfaction ($\beta = .26$), therefore we accept hypotheses H5 and H6. However, though a low and positive correlation displayed in Table 1 between learning and personal performance ($r = 0.08$), there is actually a significant negative direct effect ($\beta = -.08$). The positive effect is indirect ($\beta = .08$) and through work satisfaction. Therefore, we reject H4.

We also found direct positive relationship between motivation and personal performance ($\beta = .26$), and direct negative relationship between the demotivating factor - conflict of obligation - and personal performance ($\beta = -.10$). Appointed leader has direct positive relationship with personal performance ($\beta = .22$) and also expert has direct positive relationship with personal performance ($\beta = .10$). Hence, hypotheses H7, H8, H9 and H10 were accepted.

Additional findings: Direct positive relationships were found between motivation and learning ($\beta = .16$), appointed leader and motivation ($\beta = .17$), expert and motivation ($\beta = .15$) and expert and work satisfaction ($\beta = .07$). Agreeableness has direct positive relationship with TWQ ($\beta = .30$), and negative direct relationship with personal performance ($\beta = -.07$). Conscientiousness has direct positive relationship with TWQ ($\beta = .19$), positive relationship with learning ($\beta = .10$), positive relationship with motivation ($\beta = .37$) and negative direct relationship with conflict of obligation ($\beta = -.15$).

Discussion

The purposes of the current study were to examine person and teamwork based resources and to identify factors affecting individual performance and success in a team environment.

An empirical examination was conducted among working MBA students. The 1048 participants were involved in a computerized business simulation course which required forming teams. Each team represented the management of one firm that competed with the other teams. The team challenge was to maximize the firm value and to successfully complete assignments. The study examined data from three sources.

The proposed model was empirically tested using structural equation modeling. The results supported the proposed model. The findings show that personal resources as skills, leadership and perceived contribution to the team have positive direct effect on personal performance while workload-project conflict has negative direct effect. Work satisfaction was found to have the highest positive effect on personal performance. Personality traits, represented by conscientiousness and agreeableness, have positive effect on teamwork quality. The positive effect of teamwork based resource represented by teamwork quality construct is mostly indirect and goes through personal benefits as work satisfaction, while its direct effect on personal performance is negative.

The results indicate that building teams with high teamwork quality is not enough in order to achieve personal and team performance. Management must assign suitable employees to teams, and make the proper actions in order to enable individuals to enjoy high work satisfaction, and motivating the employees to increase their contribution to the teamwork. The findings show that though the interdependence and common goal in teamwork, personal performance and success mostly derived from personal abilities and personal achievements and less from group support. Furthermore, if group achievements are not accompanied by personal perceived success or personal abilities they decrease personal performance.

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Precursors of customer satisfaction and the mediating effect of employee voice

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Abstract

This research studies whether increased levels of employee voice through formal HRM mechanisms relate with increased levels of positive job attitudes and customer satisfaction for Istanbul hotels. Important strengths of this research is that the sample of 36 hotels is representative of all the hotels in Istanbul and analyzed data was collected from three different sources, namely customers, managements of the hotels and employees independently. The results demonstrate that the opportunities provided to the employees to participate to management mediated the relationship between the independents and the customers' satisfaction with hotel staff. Despite the fact that multiple sources of data were used, 10% of the variability in the customer's satisfaction could be accounted by the above variables ($p < .001$).

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Introduction

It is often argued that success of service organizations depends on the performance of frontline service employees. High quality service is seen as a competitive advantage for many hospitality organizations. Empowered employees can display on the spot “innovative and spontaneous activity” (Raub & Robert, 2013) and improve service quality. In the literature a close connection is found between employee empowerment and work attitudes and behavior. Psychological empowerment, for instance, is related to organisational commitment and voice behavior (Raub & Robert, 2013). In recent years there is more systematic and wider use of employee voice mechanisms in organizations. Management uses voice mechanisms to eliminate dissatisfaction in the short term but also hopes to improve business performance in the long term (Dundon, Wilkinson, Marchington & Ackers, 2004). Specifically in nonunion work environments there is need for alternative mechanisms for hearing employee voice. Although previous studies have examined employee voice mechanisms and participation in the hospitality sector context, fewer efforts have been made to further relate it to work related job attitudes and customer perceived service quality. Little is known whether the existence of voice mechanisms in hospitality organizations result in higher job performance. This research studies whether increased levels of employee voice through formal human resource management mechanisms relate with increased levels of positive job attitudes and customer satisfaction for Istanbul hotels. Next section summarizes the background to the study.

Employee Voice and Job Attitudes

Employee voice and participation has gained importance in recent years as a result of several reasons. Firstly, there has been a decline in the use of collective bargaining and in union membership in the private sector, particularly in Anglophone countries (Purcell & Georgiadis, 2007; Boxall & Purcell, 2011; Wilkonson, Dundon & Marchington, 2013). Previous research had shown that “unionized establishments have lower quit rates than nonunion establishments because they provide a voice mechanism” (Batt, Colvin & Keefe, 2002). Consecutively,

management has started to look for alternative voice mechanisms through which employees can address their problems. Secondly, there has been a growing interest in the use of high performance work systems (HPWS) and to experiment with methods for increased information sharing and involvement of employees in workplace decision making.

In nonunion settings employee voice is used for two main purposes (McCabe & Lewin, 1992). The first one is the expression of employee complaints to management in the form of formal grievance procedures and the more recent one is the participation of employees in decision making processes. Dundon et al. (2004: 1152) subdivided the meaning of voice into four strands of thought: 1) Articulation of individual dissatisfaction 2) Expression of collective organization 3) Contribution to management decision making 4) Demonstration of mutuality and co-operative relations. In their study of 18 organizations they have found that contribution to management decision making as the most common understanding among managers. In literature this association is found to exist in high- involvement and high-commitment management studies (Huselid, 1995; Boxall & Purcell, 2008; Boxall & Macky, 2009). In the HPWS literature voice is the main element of commitment to the organization. It is assumed that “valuing employee contributions might lead to improved employee attitudes and behaviors, loyalty, commitment and more cooperative relations” (Wilkinson & Fay, 2011). High involvement work practices achieve these by empowering employees to have power for making decisions, enhancing their information and knowledge and rewarding them for doing so (Bowen & Lawler, 1995; Boxall & Macky, 2009).

The range and scope of employee voice and involvement mechanisms change among organizations. Pyman et al. (2006) study has demonstrated the effectiveness of multiple channels of voice rather than a single channel. Wilkinson et al. (2013: 274) summarizes the commonly found practices in four ways. Downward communications have the intention of informing the employees about managerial actions and can range from formalized written documents to face-to face interactions. Upward problem-solving is about gathering employee knowledge and ideas and can include ad hoc committees or semi-permanent groups. Task-based participation can involve horizontal or vertical participation. Both involve adding new tasks to the existing job definition. And the last category is team working and self-management, of which both involve more direct ways of taking responsibility.

The important question lies whether the existence of employee voice mechanisms or involvement lead to improved “organisational effectiveness and employee wellbeing” (Wilkinson & Fay, 2011). The design of work and human resource practices (Batt, Colvin & Keefe, 2002) as well as the support of line managers (Boxall & Purcell, 2011) will determine how voice mechanisms will be activated and aid management to achieve the desired results. The content of the participative decisions; routineness of the decisions; relevancy to work itself; relatedness to work conditions or company policies may also effect these results (Cotton et al., 1988). In the literature, several studies have shown the link between employee voice and job attitudes. Cox et al. (2006) have shown that ‘embeddedness’; breadth (number of practices) and depth of involvement (frequency of meeting) have positive relationship with organisational commitment and job satisfaction. And Holland et al. (2011) have found a positive relationship between direct voice arrangements (regular meetings with senior management and formal employee involvement program) and job satisfaction.

In service organizations giving power to employees is important because customer is often physically there and effected by service failures. When employees are empowered they can recover service failures, respond to customer needs and delight them by exceeding their

expectations (Bowen & Lawler, 1995). He (2010) has shown that empowered employees in a hospitality organization are more satisfied with their work and when they perceive higher quality service their job satisfaction is also higher. Kim et al. (2013) have found positive impact of psychological empowerment on organisational citizenship behavior and job performance. This is in line with other studies in service-sector literature. They mention the spill-over effect in which employee job satisfaction improves customer satisfaction (Bowen & Lawler, 1995). Hospitality sector chains like Marriott, Accor, Hilton and Scott's Hotels have adopted various forms of employee empowerment practices with an interest in gaining competitive advantage through service quality (Lashley, 1995; Bowen & Lawler, 1995).

Previous studies have linked human resource management (HRM) practices to both financial and nonfinancial organisational performance indicators. They were associated with turnover (Arthur, 1994), productivity (Ichniowski et al. 1996), financial returns (Schuster, 1986; Delery & Doty, 1996), survival (Welbourne & Andrews, 1996) and firm value (Huselid, 1995). In the high-performance and high-commitment work practices literature, support for a positive relationship between bundle of HRM practices and business performance has also been identified (Guest, 1997; Hutchinson, Purcell, & Kinnie, 2000). Given the importance of the service quality to hospitality organisations, it would not be an exaggeration to can say that HRM practices have a critical role in securing employee commitment and improving employee satisfaction, which in turn could be argued to secure customer satisfaction. However, little is known as to which HRM practices can result in higher service quality levels in hospitality organizations. Next section explains the method of this research.

Method of the Study

Sample and Data Collection

This paper is a part of a wider research project investigating the competitiveness of Istanbul hotels with a 360 degree approach. The hotels studied in this research are chosen using a quota sampling technique based on star categories from the membership list of TUROB (Touristic Hotels and Investors Association). The sample includes 6 five-star hotels, 17 four-star hotels, 7 three-star hotels and 6 boutique hotels. Three sets of data were collected between April-June 2012. Firstly, a questionnaire was administered to the HRM managers in order to collect human resource management practices data from 36 hotels. Secondly, using bed capacity as an indicator of size, representative numbers of non-managerial employees for each hotel was calculated. Consecutively, in each hotel employees were invited to answer a separate questionnaire. Diverse groups of employees from each hotel until the quota for the hotel completed filled the attitude surveys (689 in total). And finally average staff related customer satisfaction score was obtained from Booking.com web site for each hotel. The numbers of customers who rated their satisfaction with each hotel's employees ranged from 11 to hundreds. These sets of data were collected separately from each respective group to overcome single source bias (see Avolio, Yammarino & Bass, 1991).

Formal Employee Voice Mechanisms Practices

Previous studies have shown that direct and dual employee voice mechanisms have positive associations with employee attitudinal values (Cox, Zagelmeyer & Marchington, 2006; Purcell & Georgiadis, 2007). Huselid (1995) had identified 13 high performance work practices in his study. Cho et al. (2006) have used 12 items from this list for measuring the impact of HRM on lodging and restaurant companies' performances in the US. To represent as comprehensive and dual a construct as possible five items were adapted from the list to measure formal employee voice mechanisms in this study (See Table 1). The HR managers

were asked to indicate the degree of implementation on the workforce on a 5 point scale ('1'= 0-20% of total employees; '5'= 81-100% of total employees).

Table 1. HRM Practices Investigated in the Survey

HRM practices items	Questions
Information Sharing	What is the proportion of the workforce who is included in a formal information-sharing program (e.g. newsletter)?
Attitude Surveys	What is the proportion of the workforce who is administered attitude surveys on a regular basis?
Labor-Management Participation Program	What is the proportion of the workforce who participates in Quality of Work life (QWL) programs, Quality Circles (QC), and/or labor management participation teams?
Incentive Plans	What is the proportion of the workforce who has access to company incentive plans, profit-sharing plans, and/or gain-sharing plans?
Grievance Procedures	What is the proportion of the workforce who has access to a formal grievance procedure and/or complaint resolution systems?

Job Attitudes

The relationships among service orientation, employees' job satisfaction and organizational commitment in the international hotel industry was emphasized in the literature (e.g., Chen, 2007). In fact, job satisfaction has been a construct that was noted quite early as a key factor for business stability. Although somewhat later, organizational commitment -especially the affective component- was found to be one of the most potent predictors of organizationally important outcomes (Meyer, Stanley, Herscovitch, & Topolnytsky, 2001). These two extensively investigated job attitudes were selected purposefully to test the mediating effect of employee voice mechanisms. In the present investigation, a battery of five questions directed to measure general job satisfaction with perceptions about pleasure derived from work. The organizational commitment dimensionality is has been long investigated and most researchers are contended that affective dimension of it is the most predictive component. In the same vein, the commonly used six item scale (Meyer et al., 2001) was employed to measure employees' loyalty and intention to stay with the hotel.

Customer Satisfaction

Online reviews constitute very valuable input for organizations, since customer feedback can be obtained at a relatively low cost (Papathanassis & Knolle, 2011). Previously several researchers have focused on studying customer satisfaction in the hospitality industry through a review of online hotel customer reviews (Li, Ye & Law, 2013). In this study, the Booking.com web site was selected as the source for user-generated comments and scores, since they have wide coverage in Turkey. Online travel sites each use their own detailed rating system. As such Booking.com allows individuals to evaluate hotels on the dimensions of cleanliness, comfort, location, facilities, value for money as well as satisfaction with staff on a 10 point-scale. For the purposes of this study "staff rating" was used for measuring customer satisfaction.

Results

The study variables' descriptives and the results of Pearson correlations are shown in Table 2 below. The Pearson correlations of the independent variables with the dependent variable of the present investigation, namely satisfaction of hotel guests with staff's service, showed the variables that were selected for the study were potent to provide a good prediction. The

correlation analyses also indicated that there the correlations among the independent variables were low to moderate, and no indication of heteroscedasticity was observed.

Table 2. Correlations among the Study Variables

	Av. (S.D.)	1	2	3	4	5	6
1. Age	31.5 (8.7)						
2. Monthly net income	4.3 (1.7)	.07*					
3. Tenure in the position	3.7 (4.5)	.49***	.09*				
4. Job satisfaction	3.9 (0.8)	.11**	.07*	.06	(.81)		
5. Affective commitment	3.6 (0.8)	.14**	.01	.13**	.61***	(.72)	
6. HRM practices	2.3 (1.1)	-.12**	.31***	-.10**	-.05	-.04	(.70)
7. Satisfaction with staff	8.0 (0.8)	-.05	.19***	-.13**	.11**	.01	.20***

Note: *Correlations statistically significant at .05 level. **Correlations statistically significant at .01 level. ***Correlations statistically significant at .001 level. Figures in parentheses are Alpha reliabilities.

For the regression analysis, gender (dummy variable, male = 1) as well as age (M=31.5; S.D.=8.7) were entered as control variables and were found to have no significant impact on the dependent variable, i.e. satisfaction of the hotel guests with staff. In the second batch of variables, monthly net income (measured on ordinal scale) and tenure in the employing hotel (measured in months) were entered. Both monthly income and tenure were found to be significant predictors, although in the opposite directions. In other words, higher income was a positive predictor, whereas longer years of service in the same hotel had a negative effect on the employees, resulting in lower satisfaction with service on the side of the hotel guests.

When the other independent variables were included into the model, the R² has reached to .06, indicating that job satisfaction's contribution to prediction was significant (Beta = .132, p<.01), whereas affective commitment did not reach to significance (Beta = -.069, p>.05). Finally, HRM practices were entered to the regression at the end of this stepwise procedure, R² increased to .10 (Durbin-Watson = 0.222). A closer investigation of the Beta weights revealed that the primary determinant for this group of respondents were use of HRM practices (Beta = .193, p<.0001) and the result was significant (F [7, 628] = 9.96, p<.001). Moreover, the beta weights of monthly net income and tenure in the hotel were reduced after the inclusion of HRM practices pointing at a possible partial mediation effect on these variables. The results of the final regression model are shown in Table 3 below.

Table 3. The regression of the independent variables on satisfaction with staff

Independent Variables	Beta	t-test	Sig.
Gender	-.001	-.026	ns
Age	.037	.830	ns
Monthly net income	.139	3.473	.001
Tenure in the hotel	-.128	-2.894	.004
Job satisfaction	.132	2.740	.006
Affective commitment	-.069	-1.420	ns
HRM practices	.193	4.788	.0001
R² of the Model		.10	

Although the obtained R² of the regression model may seem relatively low at the first glance, it might be of some value to remind that this result was obtained through the analysis of data

collected from three independent sources. The overall validity can be deemed to be considerably high, due to the advantage of overcoming single-source bias, which has been a major setback for many studies (Avolio et al., 1991).

Discussion and Conclusions

This research studied whether increased levels of employee voice through formal human resource management mechanisms relate with increased levels of positive job attitudes and customer satisfaction for Istanbul hotels. HRM departments in the hospitality industry are often seen as cost centers as the results of their activities are not openly seen on the balance sheet (Cho, Woods, Jang & Erdem, 2006). To better display the role of HRM in hospitality organizations, there is need for clearer understanding of the links between HRM practices and service quality (Worsfold, 1999).

The results imply that at hotels in which there are voice mechanisms for greater number of employees there is higher levels of employee satisfaction and resulting in customer satisfaction. Consistent with our expectations, the greater the embeddedness of the mechanisms in the percentage of workforce the better it is. When organizations provide employees with opportunities to participate in decision making and voice their opinions, the control mechanisms partially transfer from management to employees. In this approach motivation becomes intrinsic rather than extrinsic and employees will feel more responsible from their work outputs. The programs have the “ability to satisfy basic psychological needs” of employees (Hammer, 2000: 183) as well as increasing their self esteem (Cho et al., 2006). Employees can make decisions on how their work is organized and carried through programs such as quality circles and project teams; voicing their opinions through attitude surveys or during meetings with management; put their suggestions to letter boxes and solve conflict through grievance procedures. Also participation helps employees to build trust for their organization, which is linked with higher commitment and loyalty (Cho et al. 2006).

The positive relationship between activities of employee voice and participation and business outcomes had been shown in hospitality literature; managerial responsiveness and job control (Pyman, Cooper, Teicher & Holland, 2006); HPWS (Murphy & Olsen, 2009), service quality and employee perceived quality (He, 2010); job satisfaction (Holland, Pyman, & Teicher, 2011); organizational citizenship behavior and job performance (Kim, Losekoot & Milne, 2013). The findings provide support to the existing HRM literature, derived from data collected from parties involved. Studies have also underlined the benefits of a dual-channel voice rather than a single mechanism. And even though this study did not measure additive power of voice mechanisms it has shown the benefits of using a bundle of voice mechanisms.

The research has certain implications for practitioners. Hospitality industry is known to be labor intensive and one of the critical issues of HRM is managing high turnover rates. Securing the commitment of the workforce on a long-term basis and lowering turnover rates is essential for management. Firstly, the findings suggest management to use employee voice mechanisms as a means for improving job satisfaction and lowering quit rates in the hospitality industry. The results are of particular interest for non-unionized work environments, because this study was conducted in a very lightly unionized work environment. Secondly, these practices are suggested to “induce management and employees to interact and cooperate” for better organizational performance (Holland, Pyman, & Teicher, 2011). Thirdly, the results underline the significance of the monthly income for job satisfaction. There are many unsatisfied workers in the tourism industry because of their low

pay (Pelit, Ozturk & Arslanturk, 2011). Hotels should make sure that their employees are fairly paid and they are given opportunities for increasing their pay. Lastly, this paper recommends management to provide opportunities for use of voice mechanisms and participation in order to increase service quality and customer satisfaction. Customers stay loyal to a brand when they are satisfied with the quality of the service (Tsai, Song & Wong, 2009). Customer satisfaction is an intangible measurement and does not show itself immediately in the financial results. However it has become a well accepted measure for judging competitiveness and can be assumed as a predictor for future economic results.

Although this study makes several contributions to the existing knowledge base about the role of HRM functions in the hospitality industry, potential prospects for future research remain. Our study is conducted in a single location and single national culture. However studies suggest that there could be different results in other national settings. Raub and Robert (2012) found that empowerment would be more successful in countries with lower power distance and suggest use of selective implementation and adaptation. Sagie and Aycan (2003) stress the importance of sociocultural context in participative decision making approaches. Future research could better display which voice mechanisms will be more successful in different national settings. Our study asked the degree of implementation on the workforce for employee voice mechanisms but did not consider frequency of use. So for future research it is recommended to consider the depth of involvement in practices as well.

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Personal-level accountability in education: Conceptualization, measurement and validation

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Abstract

This research sets out to establish and validate a two-dimensional scale for measuring individual accountability disposition, applied to teachers and school administrators. Confirmatory factor analysis showed a two-dimensional structure: external and internal. Study 1 confirmed convergent validity of the scale vis-à-vis accountability scenarios in teachers' work. Study 2 confirmed construct validity vis-à-vis related concepts: goal orientation, work ethic and conscientiousness, using school principals as participants. Study 3 confirmed predictive validity vis-à-vis teachers' in-role and extra-role performance. The scale developed in this study may be used to enhance research on educators' predispositions regarding accountability.

Introduction

Despite great concern about accountability in business and public organizations in recent years (e.g. Monfardini, 2010), relatively little attention has been paid to its psychological manifestation, namely accountability as a *personal trait*. Yet the importance of this topic cannot be overstated. In education, school accountability has been one of the major concerns of both research and policy in recent years (Darling-Hammond, 2007; Miller & Smith, 2011). However, individual-level methodology in accountability research seems to suffer from limited measurement techniques. Most studies use an experimental design, where accountability conditions are either manipulated in laboratories or taken from the field of study (Frink & Klimoski, 1998). Although individual-level accountability represents an inner disposition that can be only reported by the individual, few valid self-report measures, designed to capture employees' own perceptions of their accountability, exist. The present study attempts to fill this lacuna in research. Based on a conceptual layout of personal-level accountability, its purpose is to develop a multi-dimensional self-report measurement of educator accountability and establish its convergent, construct and predictive validity.

Conceptual background of personal-level accountability

Accountability is regarded as the adhesive between components, where one is answerable to some audience. Frink and Ferris (1998) viewed accountability as a system of review of behavior by some constituency, including having salient rewards or punishments contingent upon the review. Similarly, Lerner and Tetlock (1999: 255) defined accountability as the "implicit or explicit expectation that one may be called on to justify one's beliefs, feelings, and actions to others". Key elements of accountability in both definitions are performance report, justification, reporting party and receiving audience, feedback, rewards, and sanctions. These elements also imply the salience of goals or agreed standards against which performance and results are measured.

Schlenker and Weigold (1989) introduced the notion of self-accountability, pertaining to *internal* mechanisms such as personal values and ethics. These mechanisms provide inner standards and goals set by individuals, who serve in this case as both reporting party and receiving audience. The internal aspect is represented by the efficacy of the concept of the self

as an audience, and is, in fact, a subjective interpretation of external cues and demands. In education, *external* accountability would typically represent a response to expectations and demands of formal (e.g., superintendent, school principal) or informal (e.g., parents, colleagues, students) audiences, while *internal* accountability would typically represent a response to the professional wisdom and ethics of the educators themselves. In sum, studies show that individual-level accountability is a complex, multi-dimensional construct, often distinguished by its external vs. internal aspects, and reflects an important aspect of educational professionalism.

Personal-level accountability vis-à-vis related concepts

To better distinguish the meaning of personal-level accountability from meanings of related notions in work context, we will discuss the relation of accountability to the following concepts: goal orientation, work ethic, and conscientiousness.

Goal orientation consists of two major organizational themes: learning and performance (Heintz & Steele-Johnson, 2004). The learning goal orientation is toward achievement and internal motivation, while the performance goal orientation is toward favorable evaluation. Both types are embedded in the concept of personal-level accountability, because goal orientation is a prerequisite to attain standards by which one's performance is necessarily measured. The learning goal orientation is likely to direct accountable employees to exert efforts at work to learn and develop in order to achieve externally and internally set goals. Employees motivated by performance goal orientation will tend to be accountable in order to win a favorable evaluation from the audience receiving their performance reports, responding largely to external accountability. The two facets of goal orientation then, are critical correlates of personal-level accountability.

Work ethic is a set of beliefs about one's work behavior, based on values, morality, professional integrity and hard work (Miller, Woehr & Hudspeth, 2002). The notion of work ethic represents a cultural set of norms that encourage individuals to be accountable and responsible, and consists of two major facets: hard work and morality (Hill & Petty, 1995). The 'hard work' facet of work ethic is likely to be related to external accountability, both concepts share the notion of adherence to organizational rules. 'Morality' may be related to internal accountability, because both concepts center on professional values. Work ethic then, is the moral foundation for the development of accountability disposition.

Conscientiousness is one of the Big-five personality constructs (Digman, 1990), consisting of personal characteristics such as order, dutifulness and achievement (Barrick & Mount, 1991). Conscientious employees set themselves challenging goals and show high commitment to achieving them (Barrick, Mount & Strauss, 1993). Conscientious employees would tend to be accountable because of their appreciation of hierarchical order, their dutifulness vis-à-vis organizational demands, and their urge to achieve own and organizational goals. These employees will tend to report and be ready for feedback from relevant parties external to themselves, as well as meeting their inner values and standards. Frink and Ferris (1999) showed in an experimental study that when accountability disposition is high, conscientious employees perform better than when it is low. Conscientiousness then, is likely to be a strong correlate of personal-level accountability.

Accountability and work performance

Generally, studies show that employee accountability enhances performance (Hall et al., 2003). In education, Rosenblatt & Shimoni's (2002) studied the link between accountability

and work performance among schoolteachers. Study participants took part in a yearly accountability program, where teachers met monthly with their superintendent and colleagues, reported on their achievements as well as failures to meet expected goals in teaching, and received feedback. In addition they also sent written monthly reports to their superintendent, and received feedback via mail. Teachers operating under this accountability program performed better than teachers in a control group. Similarly, Darling-Hammond & Asher (1991) also argued that teachers put more effort in their work when held accountable than when not.

Measurement of the accountability construct in previous research

The predominant methodology in current accountability research is based on laboratory and field experimentation. Frink and Klimoski (1998:10), in their overview of accountability operationalization, showed that most studies covered in their survey constructed accountability as an experimental condition manipulated in lab or field conditions (e.g., Frink & Ferris, 1998; 1999; Tetlock & Boettger, 1989). In lab experiments respondents were typically led to believe that their goals and achievements would be evaluated by some “supervisor”. In field experiments accountability was implied from actual conditions consisting of performance monitoring and supervisor's feedback.

One of the few experiments on accountability in education was performed by Rosenblatt and Shimoni (2002) mentioned above. Although the authors were able to establish the predictive validity of the accountability conditions designed in this study, the study results gave no indication of the participants' subjective experience, namely their inclination and predisposition to be accountable. Accountability in this study was established formally and objectively. Only few authors (Hochwarter et al. 2005; Roch & McNall, 2007) tapped into the subjective facet of accountability. These studies, however, were not based on elaborate conceptual background.

The present study addresses these lacunae in accountability methodology, focusing on schoolteachers and principals. It first describes the development of a two-dimensional (external, internal) accountability measure featuring teacher disposition to be accountable at work (accountability disposition). Second, the validity of this measure is addressed. *Convergent validity* is tested by correlation analysis between the two accountability measures and real-life accountability scenarios. *Construct validity* is established by correlating the two accountability measures with other related and unrelated constructs. Predictive validity is established by relating accountability predisposition to work performance.

The Development of personal-accountability measure

To capture the accountability experience on a personal level, an accountability disposition measure was developed, representing personal inclination to act accountably at work. The measure was developed in the following way: A focus group of 20 teachers and school administrators generated scale items representing dispositional accountability. Through a review of the literature on personal-level accountability (Frink & Ferris, 1998; Lerner & Tetlock, 1999; Weigold & Schlenker, 1991) a pool of 19 items was collected. The items represented key accountability elements: reporting on goal achievement, following standards, results-based evaluation and results-based reward or punishment. The items were examined by the group members to identify ambiguous wording, double-barreled items, and redundant items. The items that failed this test were discarded by consensus group decision. The final measure, including 13 items, is presented in the Appendix.

The distinction made in the literature (Frink & Klimoski, 1998; Schlenker & Weigold, 1989) between internal and external accountability inspired a pre-categorization of these items. External accountability items covered facets such as achieving work goals and outcome-related evaluation. Internal accountability items covered facets such as acquisition and mastery of professional knowledge and following professional codes. Responses were from 1 (strongly disagree) to 5 (strongly agree).

To confirm the two-dimensional structure a confirmatory factor analyses were performed, using a convenience sample ('snowball' method) of 256 public school teachers in the northern part of Israel. The participants' biographical background was similar to that of the general population of Israeli teachers (80% women, average age 42 years). The confirmatory analysis resulted in a reasonable fit ($\chi^2/df=2.32$, $p<0.00$, NFI=0.988, RMSEA=0.071) to the original theoretical structure. The correlation between the two factors was moderately high: $r=0.49$.

The means of the accountability scale dimensions show that respondents tended to see themselves more accountable internally than externally. All reliability coefficients were acceptable (the lowest being internal accountability disposition: $\alpha=.71$). Pearson correlation between the external and internal accountability disposition scales showed moderate to high relationships ($r=.49$, $p<0.001$). These results provide evidence of the bi-polar (external/internal) structure of the two accountability scales.

Validation tests of personal-accountability scale

Validity Study 1: Convergent Validity

The *purpose* of this study was to test the relationships between teachers' accountability disposition and their attitudes toward accountability in real-life scenarios indicating accountability in teachers' work. The study *sample* was composed of 256 public schoolteachers from the Northern part of Israel (the one used for the construction of the two accountability scales (see above)).

Results. Spearman correlation analysis showed that all four scenarios correlated significantly and positively with the general accountability disposition scale, as well as with its external and internal dimensions, suggesting full convergence validity.

Validity study 2: Construct validity

The *purpose* of this study was to investigate the nature of accountability as a personal characteristic by examining its relations with a spectrum of characteristics that are either conceptually similar to accountability (goal orientation, work ethic, conscientiousness), or conceptually unrelated (agreeableness). The *sample* was 167 principals from the northern part of Israel. Pearson correlation analysis was used to test the relations of accountability (general and dimensions) to the other study variables (general and dimensions). The general construct of accountability disposition significantly correlated with all work characteristics and all sub-dimensions, except performance goal orientation. The relation of accountability to agreeableness was unexpectedly significant and positive. Considering the accountability sub-dimensions, external accountability was related to all work characteristics and their facets, except the morality facet of work ethic, and two facets of conscientiousness: dutifulness and achievement. Internal accountability was related to all work characteristics except the general construct of goal orientation (but not its two dimensions) and work ethic and its hard-work dimension (but not its morality dimension).

Study 3: Predictive validity

The *purpose* of the third study was to explore the relation of teacher accountability disposition to work performance. 290 Israeli schoolteachers were *sampled*. In-role and extra-role performance were evaluated by pedagogical supervisors. Using HLM analysis, *results* showed that external accountability was significantly and equally related to in-role ($\beta=0.18$, $p=0.05$) and extra-role ($\beta=0.28$, $p=0.05$) performance (explained variance 2.2% and 2.5%, respectively). Internal accountability was related only to extra-role performance ($\beta=0.34$, $p<0.001$, 2.7% explained variance).

General discussion

The purpose of this research was to conceptualize personal-level accountability in education, and describe the construction and validation of a new accountability disposition scale. The scale consisted of two facets: external, where teachers and school administrators feel accountable and tend to report to an outer audience, and internal, where teachers and school administrators feel accountable and tend to report to inner ethical codes and professional standards. The two facets had reasonable psychometric properties. Results showed that teachers felt that they were more accountable to moral and professional codes than to bureaucratic and social expectations. Thus, the Israeli teachers felt themselves highly professional from an inner accountability aspect. These findings highlight the accountability aspect of teacher professionalism.

Construct validity in the current study was established in regard to goal orientation, work ethic and conscientiousness, using a sample of principals. Agreeableness was unexpectedly related to accountability predisposition. This last result may indicate that agreeableness is an important element in a successful implementation of accountability relationships. This is consistent with Hastie (1993) who suggested that no relation between student achievement and teacher rewards/punishment should exist, and with studies pointing to the negative implications of stress involved in the demand for teacher accountability (Cuban, 2007; Finnigan & Gross, 2007).

The distinction made in this study between external and internal aspects of accountability has theoretical implications. External accountability refers to formal and informal communication lines with others, while internal accountability refers to a code of conduct inside the individual. These differences were supported by the results of study 2 in regard to work ethic, where external accountability correlated significantly with hard work, and internal accountability correlated significantly with moral ethics. These differences are also consistent with the correlation between internal (but not external) accountability and the dutifulness facet of conscientiousness, and to the relation between extra-role performance and internal (but not external) accountability in Study 3. However, the finding that internal (but not external) accountability was related to the achievement facet of conscientiousness was less expected. Future studies need to investigate whether the meaning of achievement is the same for each dimension of accountability. Teachers characterized by high external accountability may interpret achievement as meeting goals set by principals and the school administration at large, while teachers characterized by internal accountability may interpret achievement as meeting their own inner goals and values.

Practical implications

Practically, the study provides tools for researchers interested in measuring accountability from an individual perspective. The scales developed in this study may help to point out individual differences in the dispositional inclination to accountability. Such differences may explain teachers' and administrators' organizational behaviors and work attitudes. School management may use the results pertaining to the differential nature of the two accountability dimensions, and the measures developed here, to select or train teachers and other decision makers based on their accountability disposition, and on school's educational vision and specific goals.

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Appendix

Accountability Disposition Scale

External dimension

In your work as a teacher, to what extent do you feel that it is your duty to –

1. give yourself a report on the extent you reached your goals at work
2. give school management a report on the extent you reached your goals at work
3. be evaluated by whether your students improve their grades
4. be accountable for your students' achievements
5. pay for the results when your work in the classroom does not meet expectations
6. get credit for the success of your classes

Internal dimension

In your work as a teacher, to what extent do you feel that it is your duty to -

7. act by your inner moral standards
8. act by professional ethical principles at your work
9. develop professionally in order to perform your work in the best way
10. learn from the work of outstanding colleagues
11. be responsible for teaching in the best possible way
12. be ready to use results of studies on instruction and education
13. be responsible for using professional knowledge in your work

The impact of job insecurity on work performance: The hindrance and challenge process

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Abstract

Job insecurity can trigger two distinct perceptions: hindrance and challenge (Staufenbiel & König, 2010). Little is known, however, about their impact on job performance. We suggest a theoretical model based on the concept of stress as a sequential evolution of coping that starts with the perception of stress as a hindrance and continues with the perception of stress as a challenge involving a drive for achievement. We also examine the contribution of self-efficacy and Occupational Competence Efficacy (OCE) to the association between the perception of job insecurity and employee performance. The model was tested on 484 employees in four different industrial organizations. The findings validate the model. The discussion focuses on the theoretical contribution and administrative applications.

Introduction

The literature on job insecurity (JI) is based primarily on the theoretical model presented by Greenhalgh & Rosenblatt (1984) where JI is experienced as a threat of termination of the employee's employment in general, or fear of the loss of benefits or advantages of the job (Greenhalgh & Rosenblatt, 1984). The undermining of the people's employment status affects their physical, psychological, cognitive and behavioral status and creates pressure in the work environment which is tied to their positions as well as their personal and social behavior within the organization (Sverke & Hellgren, 2002). Ample research has documented the negative association between JI and job performance (Reisel, Chia & Maloles, 2005). However, JI is also known to lead to an increase in effort and the achievement of higher performance targets (Brockner, 1988) in efforts to retain the job. The fear of dismissal or loss of benefits is perceived by the employee as a stress stimulus which prompts the individual to turn to the resources that are available or can be exploited (Lasarus & Folkman, 1984). Lasarus & Folkman's stress theory has attracted growing attention in the last decade in that it sees stress as a threat or challenge factor in the field of employment. Although research results suggest that a distinction should be made between positive and negative pressure and job performance (Staufenbiel & König, 2010) it remains unclear why the perception of stress can be perceived as a hindrance or as a challenge.

Questions motivating the current study:

- A. What motivates employees to reduce or increase job performance in a state of JI?
- B. How does the mechanism of perception of hindrance or perception of challenge operate? There are several alternatives: 1. The perception of hindrance and challenge as a parallel choice; 2. Different reactions to stressors of different types; 3. Different responses to different levels of stress.
- C. Is the perception of the stimulus as a hindrance the first step deriving from physiological and emotional responses and is it followed by a deeper cognitive and judgmental process in which the employee chooses to see the stress of JI as a challenge that can be beneficial?

The mechanism governing perception of JI as hindrance or challenge

Findings in the field of cognitive psychology are inconclusive as regards the positive or negative association between a stress stimulus and the perception of stress. Lazarus & Folkman (1984) described this as a two-stage process of threat assessment. In the first stage, there is an assessment of the relevance of the stimulus to the individual. If it is relevant, the individual determines whether the stimulus may cause damage, loss, threat or be a challenge. In stage 2, the coping resources available to the individual are considered together with the likelihood of success in dealing with the specific stressor under consideration. The question is what characterizes the conditions that make JI be perceived as hindrance leading to a decrease in performance (Cavanaugh, Boswell, Roehling & Boudreau, 2000) or JI as a challenging situation (Staufenbiel & König, 2010) with a positive potential and opportunities for change.

The perception of stress as a hindrance is related to the disparity between job requirements and the employee's ability to fulfill them, or is related to the circumstances which tend to limit, interfere and undermine achievement on the job and personal growth (Wallace, Edward, Arnold & Lance, 2009)

The perception of stress as a challenge is defined as requirements or circumstances related to work, which despite being potentially stressful, are tied to achievement (Boswell, Olson-Buchanan & LePine, 2004). Studies have examined such challenging stressors as work overload, time pressure and a high level of responsibility. These factors are classified as challenging because they create employee demands which are nevertheless perceived as controllable. If handled correctly they create the potential for personal growth and future achievement for the employee (Wallace et al., 2009). Cavanaugh et al. (2000) found that even managers perceived job requirements as a valuable and rewarding experience, even though they described them to be stressful. Managers reported that challenging job demands induced positive feelings.

Kahneman (2011) suggested that cognitive thinking can be characterized by two different modes. The first consists of two different processing systems. The first is rapid, shallow and often wrong. It "paints our perception of reality deftly while relying on stereotypes, generalizations and metaphors! The level of rational thought is low and is mainly based on heuristics. In contrast, the second system "excels in rational thinking, is experienced in decision-making and its logic is complete and more accurate". The connection between the two systems is what determines to a large extent the decisions people make. The second mode is the need for a narrative that guides the search for patterns and the creation of a causal mechanism for any consequence - even if it has none.

We suggest that the process of coping with JI is a gradual one that takes place in sequential stages. In the first stage JI is characterized by spontaneous, irrational, physiological (tremor, sweating, increased heart palpitations, etc.) and emotional (anger and depression) characteristics. Potentially stressful events can deprive people of sleep and lead to nightmares. The sense of threat comes from the fear of a diversion in the familiar balance and continuity in an employee's life, or a change in the employee's power of persistence in the workplace and other areas of life. JI may arise when there is infringement on the employee's required work order, demands the employee feels s/he cannot fulfill or an organizational change which s/he cannot control such as downsizing, privatization or merger. An employee in such a situation will have a hard time giving up what is familiar, will fear risk, a threat to identity, and may feel that his/her psychological contract and organizational justice have been compromised. He or she will intuitively see JI as a hindrance. Economic, social and ideological concerns can

also play a role. Concern is an emotional theme affecting cognitive perception (Borg & Elizur, 1992).

In the second stage, rational thought and the decision-making process are enhanced. They aim to reduce the employee's employment ambiguity and restore the sense of belonging to the organization. Rationality plays a significant role given the aggressive dynamics of economic change. This can lead the individual to utilitarian considerations and encourage a view that decisions regarding the feasibility of utilizing the resources available and the likelihood to succeed are challenging. Libet's studies of neural activity (2004) suggest that people deal unconsciously with events long before they are explored consciously. These studies show that emotional reactions and especially negative emotions such as fear and anger occur before decisions are made in the higher level of the cortex. Hence hindrance and challenge may emerge in the same realm of content and therefore affect each other in the same direction. We thus posit that the perception of JI is a sequential process in which the perception of hindrance precedes the perception of a challenge.

H1: There is a positive association between JI and its components, hindrance and challenge, and job performance.

Self-efficacy and JI and its components, hindrance and challenge

General self-efficacy is an individual's belief in his ability to organize the courses of action required to achieve desired results (Bandura, 1997). The perception of self-efficacy is acquired via a learning process, and makes up part of the development of self-esteem. When employees decide to control their levels of performance, they experience a sense of satisfaction. Self-efficacy influences the way an individual thinks, feels and drives himself and is related to performance and level of functioning, the need for achievement (Chen, Gully & Eden, 2001).

Self-efficacy was chosen as a model due to its importance in understanding the association between the perception of JI and its components, hindrance and challenge, and its strong influence on behavior at work and achievements in task performance, as discussed below.

Self-efficacy and JI: there is a mutual influence between self-efficacy and JI (Horovitz, 2011). Self-efficacy adapts itself to the development of individual resources underlying improvement in performance whether there is a positive association between JI and self-efficacy or a negative association (Webster, Beehr & Christiansen, 2010).

Self-efficacy and hindrance: the association between self-efficacy and the perception of stress as hindrance was reported by Webster et al. (2010). The findings showed that hindering stressors are negatively related to general self-efficacy. In another study (Horovitz, 2011) a significant positive association between hindrance and challenge was found as well as a significant positive effect of hindrance on work performance.

H2: There is a positive association between general self-efficacy and the perception of hindrance.

Self-efficacy and challenge: stressors perceived as challenge (Webster et al., 2010) were found to have a positive association with general self-efficacy, since people tend to think that despite the many efforts required of them, they are able to meet job requirements through special efforts and thus achieve self-sufficiency. When employees experience professional, intellectual, athletic and/or artistic accomplishments, inner responses trigger self-fulfillment

and personal incentives to achieve more. Since challenge is positively related to motivation, it can positively affect performance through motivation. Thus, we hypothesized:

H3: There is a positive association between general self-efficacy and the perception of challenge.

General self-efficacy and job performance

Studies have found a positive association between the level of self-efficacy and performance (Pillai & Williams, 2004). This positive association may be related to outputs, positions and conditions of the employee and his/her attitude towards the corporate environment (Curry, 2003). Therefore, we hypothesized:

H4: There is a positive association between general self-efficacy and job performance.

The effect of Occupational Competence Efficacy (OCE) on JI, hindrance, challenge and job performance

Occupational Competence Efficacy (OCE) is a unique characteristic of the general phenomenon of self-efficacy in a situation of JI (Horovitz, 2011). This characteristic defines the employee's ability to increase flexibility and a tendency toward self-management (Parker, 2008) and continued employment in a dynamic and competitive market. Self-image and perceived ability of control even if it does not exist in practice, are motivational factors in employment adaptation and in realizing the employee's potential for employment in the organization where he works or an alternative organization. Because OCE is a unique component of general self-efficacy, we posited that we might find associations with similar orientations to those found for general self-efficacy and JI variables, hindrance and challenge and job performance; however we predicted that these associations would be stronger. Therefore, we hypothesized:

H5: There is a positive association between OCE and the perception of hindrance.

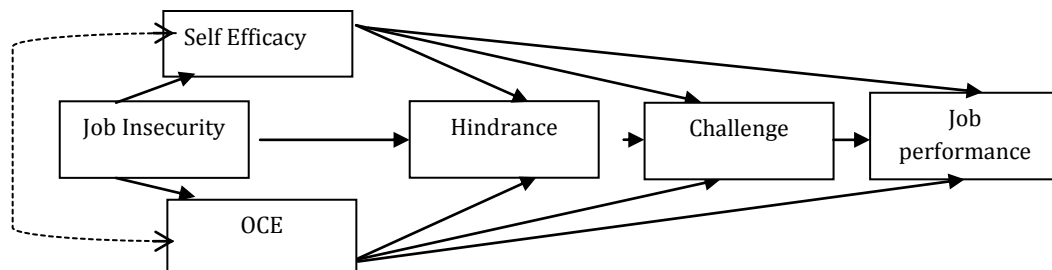
H6: There is a positive association between OCE and the perception of challenge.

Occupational Competence Efficacy (OCE) and job performance

Litt (1988) defined the specific behavioral characteristics of OCE. Control through tools, self-management, actual proficiency with tools, application of instructions, guidelines and actions in the field were found to have a positive association between OCE and job performance. Therefore, we hypothesized:

H7: There is a positive association between OCE and job performance.

Figure 1. Job insecurity effects on job performance through serial stressors



Method

The sample consisted of 484 employees in four different types of organizations: IT, marketing, services and industry. The response rate was 93%, of which 60% were men. The average age was 43 and the average tenure 9 years. Data were collected using translated

questionnaires (translation and back translation technique) which were filled out anonymously and collected immediately after completion.

Job insecurity JI was measured using questions from the Ashford, Lee & Bobko's (1989) questionnaire. The JI questionnaire consists of 10 items and taps an employee's worries concerning changes that may occur in the work environment; for example: "being transferred to a different position in the workplace". Participants rated their perceptions on a 5-point Likert scale ranging from 1 (not worried at all) to 5 (very much worried). The reliability for the scale was $\alpha = .81$.

Challenge and Hindrance Cavanaugh et al.'s (2000) original questionnaire distinguishes between questions measuring hindrance and those measuring challenge, and consists of 11 items from 3 sources:

- a. "Job demands and worker health: Main effect and worker health" (Caplan, Cobb, French, Harrison & Pinneau, 1975)
- b. "Stress Diagnostic Survey" (Ivancevich & Matteson, 1983)
- c. "The measurement of job stress: Development of the job stress index" (Sandman, 1992)

In this study we presented the items in a different way. Below each item, two scales were presented, the first referring to hindrance and the second to challenge. Answers ranged on a 5-point Likert scale from 1 (not a hindrance / challenge for me at all) to 5 (very much a hindrance / challenge for me). For each of the 11 statements, respondents were requested to choose whether the statement presented a hindrance or a challenge for them, and rate themselves on the relevant scale. A factor analysis revealed two distinct factors: the hindrance of JI and the challenge of JI.

Self- Efficacy was measured on the NGSE (New General Self Efficacy) scale developed by Chen et al. (2001) and consisted of eight items relating to different life situations; i.e. "something unpleasant to do, I stick to it until I finish it" or "I think I can achieve things that are important to me".

Occupational Competence Efficacy (OCE) was a special tool created to measure employees' confidence in their ability to keep their job in a time of JI. The OCE index was created from four items estimating employees' ability to hold on to employment momentum. This index related to self-image characteristics (Fitts, 1972), and was adapted to work qualifications; i.e. "I can make any employer recruit me".

Work Performance We compared the employees' self-reported performance with their direct supervisor's report, following Baruch's (1996) method, thus minimizing the bias related to self-report. This 5- item scale, developed by Black and Porter (1991), is based on a comparison between employees and their colleagues, such that an employee is required to rate him / herself in comparison to other employees from the same group or division. Questions included "the quality of my performance (in comparison to others)" and "the ability to get along with other employees in the workplace", and answers were rated on a 5-point Likert scale ranging from 1 (far below other employees) to 5 (far above other employees). The reliability for the scale was $\alpha = .83$. Note that the employees' and the supervisors' answers to the questionnaires and each pair of matching questions were significantly correlated ($p < .01$), thus addressing the bias related to self- reports.

Results

Table 1 presents means, standard deviations, and correlations for all variables. There was a significant correlation ($p < .01$) between JI and all other variables, in line with previous findings (Reisel et al., 2005; Sverke et al., 2002).

Tablet 1. Descriptive statistics and correlations between variables (N = 484)

Variable	M	SD	1	2	3	4	5
1 Job Insecurity	3.44	0.81	-				
2 Hindrance	2.83	0.99	.26**	-			
3 Challenge	3.22	0.96	.20**	.19**	-		
4 Self- efficacy	4.05	0.64	.21**	.07	.34**	-	
5 OCE***	3.35	0.91	.33**	.14*	.36**	.53**	-
6 Job Performance	3.80	0.64	.20**	.18**	.29**	.49**	.46**

** Correlation is significant at the 0.01 level (2-tailed). * Correlation is significant at the 0.05 level (2-tailed).

*** Occupational Competitive Efficacy

Tablet 2. Results of hierarchical regression analysis on job performance (N=484)

Predictors	Model 1 ΔR^2	β	Model 2 ΔR^2	β	Model 3 ΔR^2	β
Job Insecurity	.15*		.07		.04	
Hindrance	--		.14*		.14*	
Challenge	--		.23**		.03	
Self- Efficacy	--		--		.33**	
OCE***	--		--		.23**	
ΔR^2	.02		.08		.20	
Total R ²					.31	

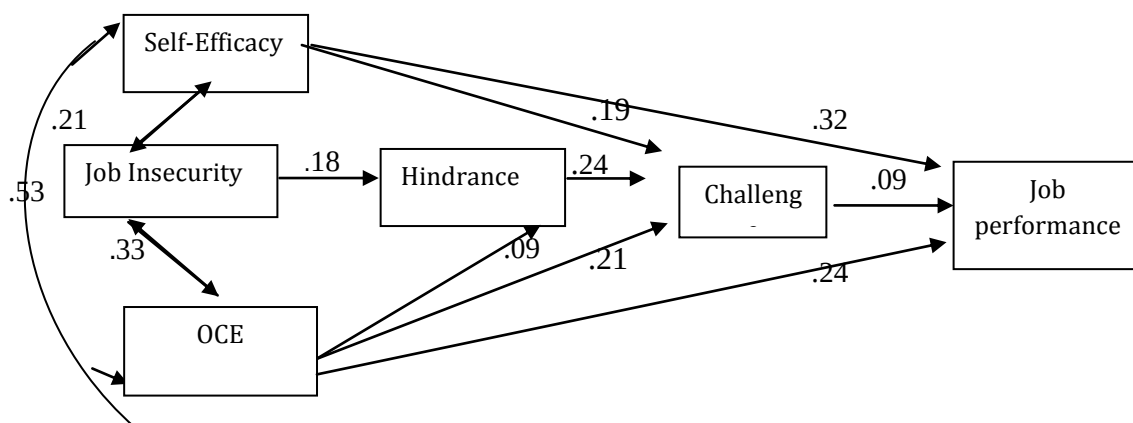
* $p < .05$, ** $p < .01$ *** Occupational Competitive Efficacy

Table 1 presents the Pearson correlation between Job Insecurity and the variables included in the model. A significant positive association was found between JI and job performance ($r = 0.20$) as well as between the components of JI: hindrance ($r = .18$) and challenge ($r = 0.29$) and job performance; thus Hypothesis 1 was confirmed. This supports the idea of a systemic effect combining JI with other indices of work performance and may be an indication that the process is sequential, as hypothesized here. The association between the components of stress perception, hindrance and challenge and the outcome variables showed that these are distinctive variables, as found in previous studies (Cavanaugh et al., 2000; Horovitz & Wiesberg, 2010). The findings here show that challenge and hindrance operate at different intensities but in the same direction ($r = 0.19$, $p < .01$). Hypothesis 2 was not supported, since no correlation was found between the perception of hindrance and general self-efficacy; however, there was a significant correlation between the perception of self-efficacy and the perception of challenge ($r = 0.34$, $p < .01$) confirming Hypothesis 3. The correlation between OCE and hindrance was found to be significant ($r = .14$, $p < .05$) and a higher correlation was found between OCE and challenge ($r = .34$, $p < .01$) confirming Hypotheses 5 and 6. General self-efficacy and OCE had the highest correlations with job performance, as was found in Pillai & Williams (2004) and in the model in general. This finding was further supported in the statistical analysis, and thus confirms Hypothesis 4 ($r = .49$), and Hypothesis 7 ($r = .46$).

Table 2 presents the findings of the hierarchical regression examining the effect of the study variables on job performance. As shown, Hypothesis 1 that predicted a positive association between JI and its components and work performance was confirmed. The effect of JI was significant ($\beta=.15$). There was a positive and significant influence of hindrance ($p<.05$, $\beta=.14$) and challenge ($p<.01$, $\beta=.23$) on job performance. When stress was perceived as a hindrance and a challenge, it contributed to an increase in the participants' work performance ($\Delta R^2=8\%$). The inclusion of personal resources, general self-efficacy and OCE contributed the most to the impact ($\Delta R^2=20\%$) of these variables on job performance and confirmed Hypothesis 4 ($p<.01$, $\beta=.33$) and Hypothesis 7 ($p<.01$, $\beta=.23$) as suggested as well in theories and studies of motivation and performance (Pillai & Williams, 2004).

In order to identify the direct effects between the study variables a Structural Equations Model (SEM) was employed. Figure 2 depicts the results of analysis of variables that affect job performance. An analysis indicated that the adaptation index was significant and the percentage of explained variance was 29%; Chi Square = 6.337 (DF = 4), $P = .175$, NFI Delta = .967, CFI = .987, RMSEA = .035.

Figure 2. Sequential impact of JI on job performance through hindrance and challenge and personal resources



The gradual association between JI and its components was not high, but the association between JI and hindrance ($p<.01$, $\beta=.18$) and between hindrance and challenge ($p<.01$, $\beta=.24$) was found to be significant. The association between challenge and performance ($\beta=.09$) was not significant, but the direction and the apparent trend was consistent with the central hypothesis.

Self-efficacy ($\beta=.19$), and OCE ($\beta=.21$) directly affect challenge in a positive and significant way, confirming Hypothesis 3 and Hypothesis 6. Path analysis failed to confirm Hypothesis 2, such that self-efficacy was not affected by hindrance. The association between OCE and hindrance was not significant but exhibited a trend in the expected direction; Hypothesis 5 was not confirmed. Self-efficacy ($\beta=.32$) and OCE ($\beta=.24$) directly affected job performance significantly. Hypotheses 4 and 7 were confirmed.

Discussion

The perception of hindrance and challenge as a sequential process of coping with job performance. The results support the proposed model that posited that an individual's

perception of stress unfolds in a sequential process in which intimidating stimuli are initially perceived as disturbing and factors for concern. Subsequently, this is replaced by rational assessment involving a challenge. Theories of stress have identified physiological (Libet, 2004) and emotional (Lazarus, 1991) responses and these were broadened into cognitive theories (Kahneman, 2011). These themes may help clarify the process employees experience in a state of JI. The theoretical model presented here suggests that coping with the consequences of JI is sequential. The first perception of stress is an intuitive, physiological and emotional response or heuristics driven by availability. This involves the tendency to respond based on recently acquired information even if this information is not accurate or representative heuristics; i.e., the tendency to rely on stereotypes originating from the rich memory storage accumulated by life experience. People turn to their memories and assessments automatically whenever a significant object or experience comes to mind (Kahneman, 2011). At the initial stage, JI is accompanied by concern. In the next stage, which may come shortly after, the employee recovers from the shock, and deep and thorough, more rational thought may emerge. This thinking leads to weighing the benefits based on observable choices the person can make. The predicted benefit of any result is the memory of a previous experience and belief in the individual's ability to reproduce it. The theoretical model we suggest supports two distinct ways of coping that come from the same content world, show an association in a similar direction. We add a unique explanation: a sequential process for coping with job performance.

The impact of personal resources: self-efficacy and Occupational Competitive Efficacy (OCE), on job performance. Personal-internal resources: Self-efficacy, which represents the individual's belief in his ability to achieve a desired result in life, as well as OCE, which represent belief in a specific situation, intervene directly in the challenge stage. The association between self-efficacy and challenge ($r=34$, $p<.01$) and between OCE and challenge ($r=36$, $p<.01$) were found to be similar. The various associations between personal resources and hindrance indicated that there are differences in the structure of the theoretical concept of OCE versus self-efficacy. However, these findings do not support Eden's (1988) claim that self-efficacy precedes situational-efficacy, which in our case, precedes OCE.

Practical Implications: The purpose of this study was to present a stress model reflecting the hindrance - challenge that occurs in JI, and to contribute to a better understanding of how employees cope with job performance. The findings may help in the practical management of human resources in organizations. For example, this could involve the creation of support centers specifically for various employee groups or training programs in personal energy management, coping with adversity, etc.

Recommendations for the future: Future work could involve empirical broadening and deepening of the proposed model of perception of stress as hindrance and challenge sequentially in the field of employment. Distinctions could be made between types of stress at work and various stress levels.

Theoretical development of the perception of stress in different sectors: Further studies are needed on the perception of JI in organizations with different employment contracts, both in formal contractual terms and in the terms of psychological contracts, compared to traditional organizations where relationship contracts are the most common type of contract.

Limitations of the study: The theoretical model is based on data collected in a field study, which may generate biases compared to a controlled experiment. The data were collected at a single period of time; thus no statements on causality can be made.

Research tools: The data were collected using a self-report questionnaire, which can lead to biases due to the halo effect related to common method variance. In order to deal with this problem, data were collected from employees as well as their superiors. However, there can also be biases in superiors' assessments due to the disparity in judgment and evaluation of each superior. Objective data on the level of employment in the parallel job market were not collected. Another methodological criticism relates to the variables 'challenge and hindrance' and the variable OCE which are first-generation research on JI; therefore the concepts and tools need clarification as well as additional testing and validation in further studies.

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Managers' evaluations of employees' self and occupational efficacies in predicting employees' performance

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Abstract

Most of the literature has examined the ways employees' evaluation of self or occupational efficacies predict performance. We argue that occupational efficacy predicts employee's performance beyond the contribution of self-efficacy by examining a general measure of performance as well as its quality, innovation and efficiency facets. Eighty-three managers evaluated their employees' self and occupational efficacies and their performance. Both self and occupational efficacies predicted the general measure of performance and occupational efficacy made a significant contribution to predicting performance. Whereas self-efficacy contributed to all three facets of performance, occupational efficacy contributed solely to innovation beyond the contribution of self-efficacy. Occupational efficacy predicted the evaluations of employees' efficiency only among female, but not male managers. Theoretical and practical implications are discussed.

Introduction

According to Bandura's (1986) social cognitive theory, human agency emerges through the interactions of three components: the person (e.g. thoughts and motivations), actions, and the context in which they operate. Each element is considered to have a mutual influence on the others. Studies on the ways in which efficacy influences behavior have mainly focused on internal resources (self-efficacy) (e.g. Bandura, 1997; Moritz, Feltz, Fahrbach, & Mack, 2000; Stajkovic & Luthans, 1998). Empirical findings indicate that both components (self and occupational) influence performance in separate ways (e.g. Brown, Jones, & Leigh, 2005; Chen, Casper, & Cortina, 2001; Judge, Jackson, Shaw, Scott, & Rich, 2007; Rigotti, Schyns, & Mohr, 2008).

This article expands previous studies and presents a more integrative model of concurrent multiple sources of internal efficacies in predicting performance. Performance facets are analyzed based on the Jaekel, Seiger, Orth, & Wiese (2012) distinction between self (general context) and occupational (i.e., specific work context) forms of efficacy and their effects on performance. We suggest that when self and occupational efficacies are introduced concurrently it provides better results in predicting performance than using only one of them. These influences are discussed in terms of the workplace and organizational behavior although the model can be generalized to other disciplines as well, such as schools and academic institutions.

The resources contributing to efficacy are often divided into a more general concept (self-efficacy) and a more task-specific one (occupational efficacy). Both refer to individuals' beliefs that they have the inner resources to perform a task successfully. Both self and occupational efficacies are crucial for high performance. The core component of internal efficacy is self-efficacy. Self-efficacy is an individual's belief in her/his capacity to mobilize the internal resources to execute the performance required to accomplish a task successfully (Bandura, 1997) and have the internal resources, such as ability, skill, talent, endurance, resourcefulness, and willpower (Stirin et al., 2012). Self-efficacy promotes flourishing,

positive affectivity, and a broadened perspective on possible thought and behavior choices during times of change and stress in general (Fredrickson, 2001). Results show that individuals with greater self-efficacy generally invest more resources (e.g. work longer and/or harder) and achieve better performance than those with lower self-efficacy. The vast majority of studies have confirmed a positive relationship between self-efficacy and important motivation processes and outcomes such as self-set goal levels, acceptance and commitment to difficult standards assigned by others, time and effort invested in the pursuit of challenging endeavors, persistence in the face of adversity, and ultimately task performance (Brown et al., 2005; Chen et al., 2001; Judge et al., 2007; Moritz et al., 2000; Stajkovic & Luthan, 1998). Self-efficacy was also shown to promote managers' idea generation (Gist, 1989) and leaders' initiating behaviors (Taggar & Seijts, 2003). Leaders' self-efficacy has also been linked to outcomes such as ratings of leader potential and motivation to lead (Chan & Drasgow, 2001), simulated organizational performance (Wood & Bandura, 1989) and perceived leader performance (Chemers, Watson & May, 2000). Most meta-analyses have found a consistent positive direction of the effects of self-efficacy on work-related performance (Moritz et al., 2000; Sadri & Robertson, 1993; Stajkovic & Luthans, 1998). Findings also indicate that experimentally augmenting internal efficacy (e.g. through verbal communication or modeling) can increase productivity (e.g. Eden & Zuk, 1995; Gist et al., 1989). This leads to the following hypothesis:

Hypothesis 1: Self-efficacy is positively related to all four measures of performance: a. general; b. quality; c. innovation; d. efficiency.

Some researchers have argued for two kinds of self-efficacy (Jaeckel et al, 2012). One is generalized self-efficacy, which is the belief that one can deal effectively with everyday problems in broad range of arenas. This is a measurable trait that can predict behavior across domains (Chen, Gully & Eden, 2001; Scholz, Dona, Sud & Schwarzer, 2002). The other is task-specific self-efficacy, which is applicable only to specific tasks or situations. In this case, to predict behavior successfully, measurement of self-efficacy must also be task-specific (Weigand & Stockham, 2000). Both general self-efficacy and task-specific self-efficacy have been shown to predict performance successfully (Moritz et al., 2000; Scholz et al., 2002; Stajkovic & Luthans, 1998). Smith, Kass, Rotunda and Schneider (2006) found that a failure significantly decreased participants' task specific self-efficacy and their subsequent task performance. However, general self-efficacy was not affected by the failure manipulation. Thus, task specific self-efficacy should predict task performance better than general self-efficacy for any single domain, whereas general self-efficacy should be a better predictor of behavior across domains (Scholz et al., 2002). These findings also strengthen the argument in the literature that general self-efficacy is more robust to any single event or setback than task specific self-efficacy (Scholz et al., 2002).

Occupational self-efficacy is related to a more specific assessment and refers to people's feelings of competence in their ability to successfully fulfill the tasks involved in their jobs. Occupational self-efficacy relates to certain aspects of job satisfaction and to affective commitment (Schyns & Collani, 2002) and performance (Rigotti et al., 2008). Thus, a person's perceived occupational efficacy is likely to be an important predictor. Furthermore, occupational efficacy may have an additional contribution in predicting performance above the contribution of the more general concept (self-efficacy):

Hypothesis 2: Occupational self-efficacy is positively related to all four measures of performance: a. general; b. quality; c. innovation; d. efficiency.

Hypothesis 3: Occupational self-efficacy will make an additional contribution to predicting performance in addition to the contribution of self-efficacy for all four measures of performance: a. general; b. quality; c. innovation; d. efficiency.

In order to extend previous efficacy studies we suggest a model of efficacies that includes both self and occupational efficacies in predicting performance from a managerial point of view. The overarching hypothesis is that self-efficacy should be the best predictor of performance and occupational efficacy should contribute to the variance of performance beyond self-efficacy.

Method

Participants

Seventy-eight managers (65% men and 35% women, ranging in age from 23 to 64, *mdn* = 37) volunteered to take part in the study. Most worked in high-tech industries. All participants were enrolled in MBA or executive MBA programs in academic institutions. Participants were in their second managerial career. All participants filled in the questionnaire for a response rate of 100%.

Materials and Procedure

Managers were invited to participate in a study on organizational behavior and social psychology (in groups ranging from 20 to 35 participants). They were told that they would complete a series of questionnaires and were instructed to work through the packet at their own pace but in the order of presentation. Following a brief socio-demographic sheet, managers were asked to evaluate their employees' internal efficacy (both self-efficacy and occupational efficacies) and their performance (quality, innovation and efficiency performance facets). Two measures of internal efficacy were assessed. The first was general internal efficacy using the Chen et al., (2001; see their appendix, p. 79) New General Self-efficacy Scale (NGSE). The NGSE taps the respondent's overall sense of being able to master the internal resources needed to succeed in challenging circumstances. Responses to the NGSE are not likely to tap any beliefs about external resources because the items focus on the respondents' beliefs about their own competence in general; they do not ask about external resources or about the level of performance expected. The NGSE scale was scored on a 5-point Likert-type scale ranging from strongly disagree (1) to strongly agree (5). Sample items included, "I believe I can succeed at most any endeavor to which I set my mind" and "Even when things are tough, I can perform quite well". The Cronbach alpha was .89. To measure managers' evaluation of employees' occupational efficacy we used the occupational efficacy questionnaire (Horovitz, 2012). This questionnaire consists of 9 items assessing managers' evaluations of their employees' efficacy at work. The occupational efficacy scale was scored on a 5-point Likert-type scale ranging from strongly disagree (1) to strongly agree (5). Sample items included: "the employee can persuade any employer to higher him" and "the employee learns new demands at work fast". The Cronbach α was .84. The performance appraisal questionnaire (Miron et al., 2004) consisted of 14 items assessing managers' evaluations of their employees' performance in terms of quality, innovation and efficiency on a 7-point Likert-type scale ranging from 1 'strongly disagree' to 7 'strongly agree'. The questionnaire consisted of three subscales corresponding to quality (e.g., "Thorough in work"; "Adhere to rules"; "Does not cut corners") (α = .88), innovation (e.g. "Innovative in research and development"; "Finds unusual solutions"; "Implements new ideas") (α = .93) and efficient performance (e.g. "Attends to matters of efficiency and saving"; "Keeps planned schedule") (α = .82).

Results

To examine the factorial structure of the performance measure, we conducted a principal component analysis with direct oblimin rotation. Although the scale was constructed around three theoretical forms of entitlement (quality, innovation, and efficiency), we first conducted a confirmatory factor analysis to assess whether the items statistically split into the three theoretical factors. This analysis yielded the three major factors (eigenvalue >1) that accounted for 72.48% of the total variance.

Factor 1 included 5 items (loading > .66) contributed 45.54% of the explained variance in assessing quality. Factor 2 (15.48%) included 5 items (loading > .82) assessing innovation. Factor 3 (11.47%) included 4 items (loading > .59) assessing efficiency (for the loadings of each item see Table 1). There was a low to medium correlation between the three factors (ranging from .46 to .53) which implies that the three factors can be treated differently in the analysis. The means, standard deviations, and correlations for each of the study variables are shown in Table 1.

Table 1. Means, standard deviations, and intercorrelations among efficiency and performance variables

	Mean	SD	1	2	3	4	5	6
1. Gender	-	-	-					
2. Self-Efficacy	4.21	.51	-.00	-				
3. Occupational Efficacy	3.88	.59	.08	.54***	-			
4. Total performance	5.28	.94	-.17	.68***	.59***	-		
5. Quality per.	5.74	.89	.06	.51***	.40***	.71***	-	
6. Innovation per.	4.82	1.43	-.28*	.62***	.52***	.87***	.46***	-
7. Efficiency per.	5.45	.99	-.06	.56***	.47***	.76***	.49***	.53***

Notes: Gender: 1 = male; 2 = female.

* $p < .05$. ** $p < .01$. *** $p < .001$.

Self and occupational efficacies scales range from 1 to 5 and performance scales range from 1 to 7.

As shown in Table 1, both self and occupational efficacies were significantly correlated with all performance measures; thus hypotheses 1a-d and 2a-d were fully confirmed.

To examine the extent to which managers' evaluation of employees' performance could be predicted from managers' evaluations of employees' efficacies measures, after controlling for the effects of gender, four hierarchical regression analyses for the total performance and the three factors measures were conducted. In each regression, gender was entered in the first step of the equation, the self-efficacy measure was entered in the second step, the occupational-efficacy measure was entered in the third step, the interactions between gender and self-efficacy were entered in the fourth step and the interaction between gender and occupational efficacy was entered in the fifth step of the equation (all treated as Z-scores). We entered the efficacy variables and gender in this order to examine the contribution of self-efficacy controlling for gender first and then in the next step the contribution of occupational efficacy controlling for gender and self-efficacy first, and then the interactions with gender controlling for the various variables.

Table 2. Hierarchical regression analysis predicting managers' performance valuations based on Self and Occupational Efficacies

	Total Performance					Quality Performance				
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
Gender	-.20	-.19*	-.21**	-.21**	-.22**	.05	.05	.05	.05	.06
Self-efficacy		.69***	.55***	.54***	.54***	.45***	.50***	.45***	.45***	.45***
Occup. efficacy			.27**	.26**	.25**	.11		.10	.10	.12
Self-efficacy X Gender				.05	-.04	.06			-.01	.06
Occup. effic. X Gender					.16	-.13				-.13
ΔR^2	.04	.47***	.05**	.00	.02	.00	.25***	.01	.00	.01
Total R ²					.58***					.27***

	Innovation Performance					Efficiency Performance				
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
Gender	-.29**	-.29**	.30***	.30***	.31***	-.11	-.10	-.11	-.11	-.13
Self-efficacy		.61***	.48***	.48***	.48***		.56***	.46***	.46***	.46***
Occup. efficacy			.25*	.25*	.24*			.19	.19	.16
Self-efficacy X Gender				.01	-.05				-.01	-.16
Occup. effic. X Gender					.12					.27*
ΔR^2	.09**	.37***	.05*	.00	.01	.01	.31***	.03	.00	.05*
Total R ²					.51***					.39***

Notes: Gender: 1 = male; 2 = female.

* $p < .05$. ** $p < .01$. *** $p < .001$.

Table 2 shows that self-efficacy made the major contribution to performance variance for all three performance components, as well as to the total score. The results also revealed that occupational self-efficacy made an additional contribution to predicting performance in addition to the contribution of self-efficacy on the general measure of performance as well as the innovation measure of performance, thus supporting hypotheses 3a and 3c. However the results revealed that occupational efficacy did not make an additional contribution to either quality and efficiency measure of performance, thus disconfirming hypothesis 3b and 3d. Although not hypothesized, the interaction of occupational efficacy and gender also significantly contributed to explaining the variance of the efficiency performance component. Simple slope analyses (Aiken & West, 1991) for the interaction between occupational efficacy and gender in predicting the efficiency measure revealed that occupational efficacy was significantly associated with managers' evaluations of employees' efficiency only among female managers, $\beta = .64$, $p < .001$, but not among male managers, $\beta = .27$, $p > .05$.

Discussion

In general, efficacy can best be seen as a person's subjective assessment of all the available resources that may be harnessed and assessed to perform a job successfully. This study provides compelling empirical evidence for a multilevel approach to the ways in which managers' evaluation of their employees' self and occupational efficacies contribute to predicting their evaluations of employees' performance. The results show that self-efficacy has a greater predicting power for employees' performance than occupational efficacy but that occupational efficacy explains additional variance in employees' performance on top of the variance explained by self-efficacy in the total performance score as well as the innovation

performance factor. Manager's gender moderated managers' evaluations of employees' efficacies in predicting employees' performance. Specifically, only female managers saw occupational efficacy as a predictor of efficiency in employees' performance.

These results have significant theoretical as well as practical implications. A multilevel approach provides a better understanding of the ways both self and occupational efficacies predict the evaluations of employees' performance by their managers. Managers' gender moderates this prediction in a way that corresponds to their expectations of the specific efficacy. Thus in addition to the way societally-determined beliefs about gender-appropriate characteristics translate into differences in behavior between women and men, managers' gender moderates the weight given to occupational efficacy in predicting employees' efficiency performance.

Clearly the way managers word their messages, and in particular the use of messages that show more trust and confidence in their employees' performance capabilities may act as self-fulfilling prophecy. Recognition of the impact of gender role expectations will help managers to better understand the weight given to the occupational efficacy in predicting employee's efficiency performance. Our findings are consistent with studies that have examined each efficacy separately in predicting employees' performance. These include self-efficacy (e.g. Brown et al., 2005; Chen et al., 2001; Judge et al., 2007; Beauregard, 2012) and occupational efficacy (Rigotti et al. 2008). The results show that in addition to the direct prediction of each efficacy separately, the concurrent prediction of the occupational efficacies has an additive contribution and better predicts employees' performance. One limitation of this study is related to the measurement of employees' performance, which was evaluated by managers. This methodology does provide a means to investigate managers' perceptions of the different efficacies and performance of their employees. Nevertheless, for future research it is preferable (when possible) to include direct measurements of performance. It would be interesting to examine whether there is an interaction between managers' gender and employees' gender in predicting the different performance facets.

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The specificity of persons with a preference for IT and e-Learning

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Abstract

The goal of the text is to ascertain whether an AQ coefficient questionnaire (Baron-Cohen et al., 2001) differentiates Polish humanities and IT students similarly to the English study. Hypotheses concerning relationships between the AQ coefficient and its subscales and satisfaction derived from e-learning were also verified on a sample of 120 working students of a Warsaw college, where both groups have the same compulsory subject, taught as an e-learning module. Results show some of the expected relationships, however most of them are statistically insignificant. Their discussion shows that no new arguments for the common-sense observation that some of an individual's features – associated either with cognitive style, or else biologically determined – may predispose him or her to be a good e-student.

Introduction

The issue of whether traits that are beyond our control shape careers – and if so, which – has been the object of discussion for years. This has included traits significant both for choosing the profession of IT specialist, as for choosing e-learning as a method of tuition. In their extreme manifestations, these discussions have crossed the borders of political correctness, advising whether someone can function in their professional role – with due care not taken to back this advice with sound empirical foundations.

Frequently such suggestions concern gender. Iszkowski and Tadeusiewicz (2011) for instance state that women are weakly predisposed to become IT programmers, basing their suggestion on colloquial knowledge. A number of statistical studies have also shown that women – as compared with men – leave this profession three times more frequently, choose it far less often, and far more frequently resign from an educational path which will prepare them for a profession in IT (Ahuja, 2007; Trauth, Quesenberry and Huang, 2009). This phenomenon, however, is usually explained by referring to culture. Specific conditions that developed by accident in the IT setting (meritocratic competitiveness, continual comparative appraisals, a “male cloakroom” atmosphere, long working hours making it difficult to reconcile work and personal life – cf.: Łubieńska and Woźniak, 2012), push women out of this profession and cause the people who work in it to resemble the stereotypical geek.

At the turn of the 21 century, new data showed an additional factor which makes it easier for certain groups to work in the IT profession. S. Baron-Cohen's team observed that mathematicians and students of the sciences differ from the general population on two cognitive dimensions – empathizing and systematizing. Several empirical studies have attempted to place the source of these differences in biological factors. However, even as a personality difference, i.e. a fairly permanent feature with indistinct etiology, these factors help explain in a politically correct and comprehensible way the likelihood that certain types of persons will have of attaining success in different professions (if intelligence, effort, work devoted or even “talent”, are evened out). This research shows that mathematicians are characterized by a higher tendency to analyze systems, as opposed to cooperating with others. People who enjoy learning with the help of e-learning tools are sometimes described as featuring a low need for interaction with colleagues (Nadelko, 2008). It may therefore be interesting to check whether increases in the AQ factor (the measure used to describe Baron-

Cohen's phenomenon), characteristic of mathematicians and programmers, also ensure success in e-learning. The author is not aware of any research using AQ tools outside Western Europe and the US. The goal of this article is therefore twofold. Firstly, it intends to verify whether persons who enjoy e-learning also feature qualities analogous to the ones mentioned above. Secondly, it attempts to replicate the English study on young Polish professionals, seeking to answer whether the AQ factor differentiates the humanities and IT professionals in other cultures as well.

The text is organized as follows. First, it describes some of the Baron-Cohen group's findings concerning the specific cognitive styles characteristic of High-Functioning Autistics, persons with Asperger syndrome, IT specialists and men. This part illustrates the framework of the study, the goal of which was to verify the relationships between AQ level – in Baron-Cohen's opinion also featured by representatives of the autism spectrum – and being a good e-learner. The next section presents a summary of findings concerning the specifics of persons who learn effectively with the use of e-tuition tools. The fourth part presents the methodology used in the empirical study and the fifth – its results.

The autism spectrum and AQ coefficient

Medical practitioners use the term “autism spectrum” to describe the range of differences between different types of persons with social and communication disorders, who also exhibit strong limitations in a variety of areas of interest and (frequently) compulsory repetitive behavioural patterns. The ASD (Autism Spectrum Disorder) includes: grading the scale of difficulties experienced in everyday social life, among others:

- Autism,
- Asperger syndrome (AS),
- HFA (High-FunctioningAutism),
- and others – cf.: Wikipedia: Autism spectrum (2.04.2013).

“Autism is defined as a disorder of social development and communication, characterised by compulsory-repetitive behaviours and a limited imagination” (Baron-Cohen et al., 2001:5). The most serious disorder in the ASD is considered to be (childhood) autism, which makes itself apparent before a child is three years old and consists of disorders of behaviour and perception. In Asperger's syndrome, the disorders are similar, but the child does not exhibit delays in speech development or cognitive skills, and speech disorders are far weaker than in autistics. Both disorders have three common features, which form the basis for diagnosis:

1. deficits in social development;
2. deficits in communication development;
3. very strong but limited interests and compulsory-repetitive behaviour.

The next category (HFA) in the autism spectrum classifies persons whose social deficits are lesser, due mainly to a higher level of cognitive skills. In Poland, HFA is treated as an informal category and applied to persons with a not lower than average IQ. When referring to autism and the Autism Spectrum Disorder (ASD) in our text, unless otherwise stated, we will mean the above category, i.e. HFA. Boys feature ASD four times more frequently than girls. Persons with disorders from the spectrum – other than autism – as a rule function well and have highly developed cognitive skills, though these may be limited to chosen fields, so ASs or HFAs may attain excellent results at work.

It should be noted that contemporary biological science considers the autism spectrum to be no more than the extreme end of a dimension of social functioning (Guidice et al., 2010; Auyeung et al., 2009) – hence people who function in a socially appropriate way may also feature traits characteristic of the autism spectrum. The dimensions of this similarity are variously described, but from the perspective of this text we are interested in two cognitive dimensions, i.e. empathising and systematizing. Empathising is understood here as recognizing on the cognitive level and reacting emotionally in an adequate way to feelings shown by other people. Systematizing is the tendency to analyse and construct systems, understood as “attempts to discover rules governing a system, to be able to predict how the system will behave” (Auyeung et al., 2009: 71). Most people evince a moderate level of one or both these kinds of features, while “individuals of the autism spectrum are characterized by impairment in empathizing alongside intact, or even superior systematizing. Adults with AS [Asperger’s syndrome] are more likely to have a brain of extreme type S [systematizing] and are distinguished by their high SQ-EQ [difference between systematizing level and empathizing level] difference score” (Baron-Cohen et al., 2005: 820).

To diagnose these factors, a questionnaire tool measuring the so-called AQ coefficient was developed. Attempts have been made to interpret the results by turning to biology and hormonal factors, which may result in a changed formation of synapses in the prenatal period² (Baron-Cohen et al., 2005) but such an explanation is under discussion (Guidice et al., 2010).

High systematizing skills may explain the so-called autism paradox, which is manifested in the fact that some autistics have high or even extremely high intellectual skills in certain areas (e.g. mathematics), while they are extremely deficient in others. In certain cases the tendency to focus obsessively on chosen issues, linked with high analytical skills, may be of help in finding work related to the subject of the obsessive focus. This work is frequently of a technical nature or in IT.

Computers are frequently the focus of this kind of “obsessive” behaviour. Asperger’s syndrome is therefore sometimes called the “geek syndrome” or “computer maniac disorder”. Computers were designed to store and process information, which is a favourite activity for persons with AS. People with high AQ have been found to be effective in business. Borderline autistics are employed as programmers and testers. According to gazeta.pl, SAP has been employing autistics in its research and development centres in India and Ireland since 2011, and by 2020 wants 1% of its employees to be autistics³. Autistics have been testing computer programs for the Danish company Specialisterne since 2005⁴. Specialisterne does not have any special funding or tax relief for this purpose – it functions in a market economy, as autistics have turned out to be excellent testers of computer programs.

Businesses usually employ persons with a light form of autism (HFA), most frequently with Asperger’s syndrome, who are able to function normally but react negatively to new

² An argument for the genetic determination of the autism spectrum is the fact that disturbances from this spectrum have become more common in Silicon Valley children, as described by the IT press http://www.wired.com/wired/archive/9.12/aspergers_pr.html (1.09.2013). A critical discussion of this view and Baron-Cohen’s study in The Netherlands may be found in <http://www.nature.com/news/2011/111102/full/479025a.html> (1.09.2013)

³ After: http://wiadomosci.gazeta.pl/wiadomosci/1,114871,13956412,Informatyczny_gigant_chce_zatrudnic_chorych_na_autyzm_.html (1.09.2013).

Cf. also: <http://www.theverge.com/2013/6/6/4399468/autism-tech-jobs-unemployment-crisis-solution>

⁴ http://requirementsjournal.com/PL/Wiedza/poszukiwanie_pracownikow.pdf (1.09.2013).

surroundings, unexpected situations and the company of people they do not know. For this reason they frequently drop out of the mainstream education system, which requires passing stressful exams.

The gradual de-labelling of the autism spectrum may also be helped by research showing that further steps in this spectrum are represented by groups of persons who function in a socially appropriate way – namely students of the sciences (from mathematicians and IT professionals, to engineers), and men. Research has shown, though the samples were not large, that the discrepancy between systematizing and empathizing skills in men – as compared with women – is high (Baron-Cohen et al., 2005).

For the purposes of this text, it needs to be emphasized that the disparity between systematizing and empathizing styles becomes an indirect index of dysfunctions on the autism spectrum only after a well-defined level of discrepancy is crossed. Measures of this disparity in persons who function effectively in everyday life can only be a gauge for understanding their talents or interests in certain areas. Well-known studies of professional interests (such as Holland's typology, cf. e.g. Woźniak, 2013) are based on the similarity between declared interests and the interests of people who work in the given profession. In contrast, systematizing and empathizing indices diagnose chosen cognitive skills (i.e. "hard" personality features), even if the diagnosis is conducted using questionnaires measuring preferences for types of social situations. It should also be mentioned that all the differences described here characterize groups and say nothing of individual differences, i.e. they do not for instance diagnose whether a specific woman will be a good or not-so-good IT specialist (Baron-Cohen et al., 2005).

The specifics of a "good e-learner"

In both general education as that carried out by businesses, teaching⁵ with the use of e-learning tools is currently an important segment of the educational industry. ASTD research shows that about 1/3 of training time in American businesses is conducted via e-learning (Woźniak, 2009). Hence it is of practical and well as theoretical importance to find out whether everyone can learn with the use of these methods.

We define a good e-learner as someone for whom learning with the use of e-learning methods comes with ease, and who derives satisfaction from doing so. We do not enter into discussions – either on a general level, or to compare ease of learning with traditional methods – whether all educational content can be taught with the use of e-learning tools. We simply accept that good e-students are able to take better advantage of an e-course than average students, both as concerns learning effectiveness as their satisfaction. A measure of educational effectiveness which puts together indices from Kirkpatrick's levels 1 and 2 is natural for practical purposes, as research suggests that both these factors independently affect implementation of training content by the trainee (Alliger et al., 1997). Below we analyse research into the characteristics of good e-learners, with the aim of distinguishing traits that are practically unalterable ("personality traits"), which favour becoming a good e-student.

Research on the specifics of good e-learners is conducted within two different frameworks. The first looks at psychological features which incline a person to reach for new technologies, and bases on the Technology Acceptance Model (TAM – see Woźniak, 2009). This model

⁵ Parts 3 and 5 of this article were first published in Polish in (Woźniak, 2013).

postulates that the intention to use a new technology (specifically in this case an e-learning course) is completely determined by two psychological states: perceived ease and perceived utility. The model has been criticized on multiple occasions for not taking into consideration situational factors of different kinds, which obviously have an influence on the intention to use new technologies (Woźniak, 2009). For instance, if my previous experiences with this technology were good, this fact may directly influence the intention to use a new technology (and not only indirectly via perceived ease of use) – (this has been verified by Rocca and Gange, 2008 – cf.: Woźniak, 2009).

At the time of writing, a third version of this model, the TAM3 (cf. Brown and Charlier, 2013), additionally examines the effects both of preceding variables, as of variables which act independently of the two fundamental TAM variables. The value of TAM-based studies is continually being discussed, as several allegations go beyond the obvious limitations of this model. Specifically:

- The relationship between intention to use and de-facto using is unclear – Zang et al. (2008 – after: Woźniak, 2009) show that the model they propose explains over 70% variability in the intention to use, as opposed to only 13% in the usage of an e-learning course (cf.: Woźniak 2009). In the opinion of some, TAM3 explains about 40% of the variability in the intention to use (Venkatesh, Bala, 2008 – after: Brown and Charlier, 2013).
- The intention to use cannot be treated as a prognostic for usage, as such usage would disregard organizational factors (such as coercion and incentives on the part of the institution, pressure from superiors, colleagues and clients, tasks engaged in, etc.) that have de facto influence on workplace behaviour (Brown and Charlier, 2013). It has long been proven for instance, that being overworked is a good (negative) prognostic for time spent on e-learning (Brown 2005 – after: Woźniak, 2009).
- E-learning has ceased to be a new technology. Contemporary students have been living in a computerized world for years and the number of e-natives relative to those who just use new technologies is constantly growing. In this sense data that intention to use explains ca. 1/3 of the variability of usage (Liu and Lao, 2008 – after: Woźniak, 2009) should be treated at the most as a historical fact, or at least as one unrelated to the newness of the technology.

Although the TAM is still an important focal point for e-learning research (Brown and Charlier, 2013), it should be noted that in models of this kind, students' cognitive or biological specifics have no explanatory significance, as only psychological factors (or TAM 3's situational or organizational factors) are taken into consideration.

A second, completely different and fairly atheoretical approach studies the specific features which make e-learning easier. Although the conclusions from this research suggest that motivational factors have a dominant significance (Maurer et al., 2008; Brown and Charlier, 2013: 41), some of the variables go beyond the psychological factors characteristic of TAM research. For example, among variables describing students' attitudes, the following are of significance for success in e-learning: readiness to use e-literature and ICTs (Nadelko, 2008), learning orientation as opposed to success-orientation (cf. Swan, 2004). These variables are to a certain extent situational, operationalized as answers to specific questions, and their relationship to an individual's permanent traits is unclear.

Permanent features have included: self-discipline (Nadelko, 2008), visual (as opposed auditory or kinesthetic) learning style and finally preference for reflective observation and abstract conceptualization over the remaining two of David Kolb's learning styles (Swan,

2004). It has also been shown that success in e-learning is favoured by a low need for interaction with colleagues (Nadelko, 2008) and belonging to groups which are: maturer, independent and risk-taking (cf. literature cited in Woźniak, 2009: 43).

Such personality features as conscientiousness and openness to new experiences have been shown to indirectly favour high levels of motivation to learn (and so also e-learn), through goal orientation (Maurer, Lippstreu and Judge, 2008). This is consistent with the common knowledge view that e-learning is easier for goal-oriented and disciplined persons.

Basing on these results, it seems that the self-discipline, time management skills, maturity and strong goal-orientation of good e-students (cf. Woźniak, 2009: 43, 53) are factors that favour a high motivation to learn, rather than being independent factors affecting ease in e-learning. As motivation to learn may be influenced by changing organizational factors (Woźniak, 2009: 43-53), we do not currently know whether any specific cognitive factors are related to e-learning ability, readiness to learn this way or satisfaction with doing so. This would mean that independent of AQ level, groups should not differ in their reactions to e-learning.

We should also draw attention to medical studies which show the appropriateness of e-learning for persons diagnosed with autism disorders. Research emphasizes that “interacting with a computer is treated by [autistic persons] as a ‘safe’ and ‘enjoyable’ experience”. This may be explained by the fact that when interacting with a computer one is not faced with threatening expectations or evaluation, in opposition to social situations” (Konstantinidis et al., 2009: 2). Research into e-learning systems adapted to persons with cognitive dysfunctions (and this includes HFAs) has not been widely conducted (Wachowiak et al., 2010: 63), although such adjusted e-learning systems have been recommended especially for HFAs (Wachowiak et al. 2010). It should also be noted that e-learning tools for developing social skills have been constructed for persons with AS (Baron-Cohen, 2009).

To summarize, research on the autism spectrum suggests that persons with these dysfunctions have a greater capacity to study using e-learning tools than traditional ones. The theoretical reasoning behind this research – that social interaction induced stress levels are decreased in e-learning situations – allows us to assume that this suggestion will also apply to persons who function effectively but who have an “IT (or ASD) profile”, i.e. higher systematization levels as compared with empathizing levels. Such a “good e-student” profile, which has not as yet been the object of e-learning research, will be the focus of our study, described below.

Methods

The goal of the study was to verify whether a correlation exists between declared ease of e-learning and the AQ coefficient measuring differences in empathizing and systematizing. We also wanted to show that IT students on average evince higher AQ values than students of the arts, which would indicate that the difference between science- and arts-oriented minds also occurs in other cultural environments than those studied to date.

The study was conducted on a group of 120 extramural undergraduate students. 1st year management students, 3rd year management students, 1st year IT students and 3rd year IT students each comprised ¼ of the sample. Most of the students also worked professionally although they had just begun their careers. The choice of students, enrolled in a private Warsaw university, was dictated by the researchers’ convenience and the fact that in both departments the same subject is studied in the form of a compulsory e-learning module. We

could thus use the common experience of students from two different environments, who – it was to be expected – would manifest different cognitive profiles.

Research has usually treated e-learning trainings as a uniform kind of stimulus. It has not taken into account the fact that some e-learning courses (e.g. more richly interactive or with a broader range of teaching techniques) may cause different responses and be variously evaluated, not because students differ with respect to learning profiles, but because the quality of their learning experiences (the quality of the stimulus) is different. The choice of samples in our study puts a partial check on this difficulty.

Measurement scales were adapted from the English, and locally specific ad hoc ones were added. Due to the pilot nature of the study, the tools used were not standardized or localized. The AQ variable (measuring difference between empathizing and systematizing) was tested using a Polish translation of the English scale from (Baron-Cohen et al., 2001).

A scale measuring satisfaction with e-learning was constructed basing on a five-point scale from (Maurer et al., 2003), with the addition of two questions: (i) “The *Academic skills* course gave sufficient information on this subject”, and (ii) “I had no difficulty with completing the *Academic skills* course”. These questions were phrased in this way for two reasons. Firstly, (Alliger et al. 1997) have shown that using questions concerning utility or the adequacy of content to assess satisfaction with a course has the highest correlation with application (i.e. satisfaction is the best measure for predicting training transfer). Secondly, the “*Academic skills*” course is considered to be a poor e-learning module, overloaded with presentations and lacking in more refined exercises or simulations. When informally questioned, students state it to be boring and not very useful – so any praise it earns was considered to be indicative of ease of learning with the use of e-learning tools.

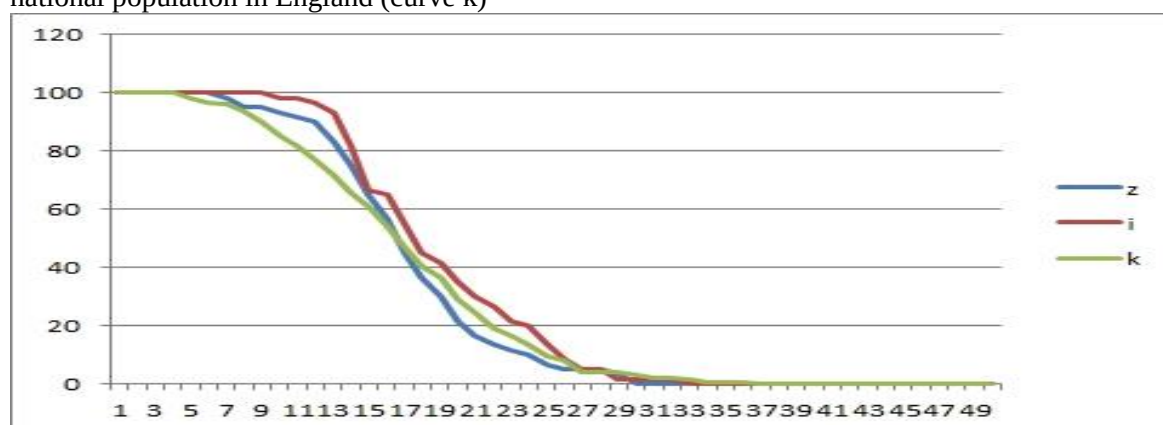
The study was conducted in April 2013, the basis for the empirical part of the MA thesis of Ms Joanna Homka, a 5th year student of The University of Finances and Management in Warsaw. The study was to verify two hypotheses, operationalizing the concept of “good e-student” in different ways:

1. Humanists evince an average lower level of the AQ coefficient – measured using a Polish translated version of the questionnaire from (Baron-Cohen et al., 2001) – as compared with IT professionals.
2. Persons with a higher AQ index more frequently call themselves “a good e-learner”.

Research results

The point of departure for further analyses of the hypotheses was verifying the adequacy of measuring the AQ coefficient with the help of the translated English questionnaire. A measure of the AQ’s adequacy was taken to be differentiating between the two groups studied – humanists and IT students. The graph below shows how a higher AQ level differentiates the two groups. The horizontal axis illustrates the number of questions which give AQ answers (the maximum is 50 questions, indices over 31 are diagnostic for autism), while the vertical axis illustrates the number of persons in each group who gave AQ answers, in percentages. Curve k in Table 1, represents the distribution of AQ in the general population (from research conducted by Baron-Cohen et al., 2001, i.e. on the English population).

Table 1. Comparison between IT students (curve i) and management students (curve z) with the national population in England (curve k)



Source: for curves z and i – own research; for curve k – on the basis of data from (Baron-Cohen et al., 2001).

The above diagram shows that the Polish questionnaire differentiates IT and management students as predicted, i.e. IT students frequently evince a higher level of the AQ index than humanists (represented here by students of management). The data collected also allows us state that the mean value of the AQ coefficient also reflects this interdependence, which is illustrated in Table 2 below. We may jokingly say that education brings effects – an increase in humanists’ ability to systematize (statistically insignificant).

Table 2. Mean value of the AQ coefficient for student groups

Level	Mean	N	Standard deviation
1st year of management	17,4333	30	5,01503
3rd year of management	17,6333	30	4,92344
1st year of IT	19,1333	30	4,85467
3rd year of IT	19,1333	30	5,24393
Total	18,3333	120	5,01315

Hypothesis 2, concerning the relationship between AQ coefficient level and being a good e-student, was not confirmed, although for most operationalizations of the term “good e-student” the trends were as predicted (though insignificant statistically). To verify the hypothesis, the subjects were divided into four groups of similar size, according to AQ coefficient levels.

Declarations of satisfaction with using e-learning tools for studying (“I like to e-learn”) show that each of the four AQ coefficient levels gives fairly similar e-learning satisfaction levels, although in the two highest groups, 55% like e-learning while in the two lowest – 45%. Subjects declare slightly higher efficacy levels (“I can study using e-learning tools”), i.e. about 2/3 positive answers (and in the group with highest AQ levels 83%).

These levels are even higher when the question concerns a specific course (“I had no difficulty with completing the *Academic skills* course”), although in this case the lowest efficacy was manifested in the group with the highest AQ. As should have been expected, ratings of the utility of a poor e-learning course were definitely lower than ratings of how easy it is. Even here, however, 2/3 of the ratings were positive (and the lower the AQ – the higher the ratings). The group with the lowest AQ rated the utility of the course higher than the

remaining groups – both the percentage of highest ratings was greatest (the remaining AQ groups gave half as many), as average ratings (“rather yes”).

The distribution of answers to questions concerning general declarations (“I usually prefer a good e-learning course to other ways of learning” and “there are topics which I prefer to get acquainted with through e-learning”) did not show significant differences between the four AQ-level groups. It was found that subjects with the highest and second highest AQ levels preferred e-learning courses as opposed to subjects with medium and lower AQ, and those from the AC higher groups more frequently preferred e-courses for certain topics (1/3 “decidedly agreed” in comparison with 14%), but the sample was too small for the result to be significant statistically.

It should be noted that our operationalizations of the “good e-learner” concept did not differentiate respondents. A factor analysis of the various operationalizations, however, confirmed that two questions concerning the “Academic skills” course differentiated responses. Two of the factors are responsible for the best model – the first explaining 47% variability (loaded by questions about general satisfaction and e-learning efficiency), and the second 17% (loaded by two questions about this course).

Summary

From a management perspective, knowledge concerning preferences and talents of different individuals may be very useful. However, instructions concerning their development are frequently based on stereotypes with no scientific foundation. The goal of this text was to start verifying whether the AQ coefficient may be a significant enough variable to recommend its use in planning development.

A sample of young professionals who simultaneously attend a private extramural university course in Warsaw has shown that the AQ coefficient does differentiate IT and management workers, as has been suggested by the English study.

However, no strong relationships were observed between AQ coefficient values and declared e-learning proficiency. This result was unexpected, as several operationalizations of the category of “good e-student” – the measure used for declared proficiency and satisfaction derived from e-learning methods – were tested. This result suggests that the specific cognitive orientation responsible for choosing a sciences-oriented profession, at least one which the AQ scale measures, operationalized on 4 levels of intensity, does not have any significant effect on perceived value of tuition with the help of e-learning tools.

There are several limitations to generalizing our conclusions. Firstly, management directives concern activities to be implemented and not opinions about activities. Our study, however, concerned opinions and not activities, as proficiency in the role of a good e-student was evaluated using measures of reactions in Kirkpatrick’s typology (1 level). Some of the questions concerned satisfaction with real occurrences, but some were general declarations of satisfaction. Rather than being an indicator of attitude to e-learning, this made them resemble declarations of efficacy in some unclearly specified field of activity. Research shows that efficacy is a good prognostic for implementation, as long as it concerns a precisely defined group of activities which the respondent evaluates. Similarly – assessment of reactions are the best, but still very weak, prognostic for transfer of lessons learnt during training.

Secondly, the respondents' declarations concerned a quite specific e-learning course and their general declarations may have been partially biased by reference to this course. "Academic skills" is a fairly static lecture on skills which are not particularly pertinent to students' immediate needs, so our results may simply demonstrate the lack of association between the AQ coefficient and low quality e-learning courses, which additionally do not address students' perceived needs. This kind of limitation in e-learning studies, where the kind and quality of courses are not differentiated between, requires further research. Just as assessment of self-efficacy differs depending on the specific challenge for which the efficacy is measured, opinions concerning e-learning efficacy should also differ depending on the kind of course the respondents have in mind when they formulate their opinions.

The data was analysed assuming a specific interpretation of AQ intensity. The theoretical model on which the AQ coefficient measure is based does not indicate convincingly how to assign respondents to the several AQ categories. The sample was too small to verify the hypotheses on more differentiated operationalizations of this variable.

The fourth limitation is obvious. The sample was small, and its character – though adequate for an exploratory study – fairly accidental from the point of view of generalizing results. Hence we propose that more wide scale research into the relationship between an individual's more permanent features, their readiness to choose e-learning methods and evaluations of self-efficacy should be conducted.

It should be noted that studies of preferences for various tools of development are still infrequent. Their significance for management – as sources of advice on how to build efficient training procedures and increase the speed with which employee competencies are developed – is self-evident. This gap in scientific knowledge may be partially explained by a weakness of theories on which e-learning research is based, i.e. that they still treat e-learning from the perspective of applying new technologies. In the opinion of the author of this text, opening the "black box", which in the TAM theoretical model is an active person with traits, preferences and values, will be the most important input of the research project into understanding the determinants of efficiency in e-learning.

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Chapter 4: Work and Work-Life Balance

The quality of work life and the intensification of work

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Abstract

In our paper we will focus on work intensification and the quality of work life (QWL). During the economic crises many companies try to survive by using work intensification and thus neglect the quality of work life of their workers. QWL has been identified as a personal reaction to work environment and experiences such as the perception of control, involvement, commitment, work-life balance, and wellbeing in relation to someone's job and organization. Work intensification can be seen in the increased number of work hours, overtime hours, working at very high speed, working in free time and in shifts as well as in the consequences such as mental and physical strains and less favourable conditions for work family integration. But as we will show in our analysis, the consequences for an organization are not very positive as well. We will present data from Slovenia where the questionnaire was carried out on a representative sample of the adult population. Our analysis shows that work intensification does not always produce such bad consequences.

Introduction

It is apparent that the balance between work, leisure, and material needs of employees has experienced much variance over time; the globalization after the 1990s has taken the direction that working hours in some Western countries have begun to rise again. Moreover, various demographic and workplace changes that currently exist affect QWL in a negative way disrespectful of culture, technology advancement, social and economic structures. Specially, workplace changes as well as a higher demand for flexibility of working hours and the location of work, have led to changes in the way workers manage their work and life. The economic crisis that has not been overcome yet just added on to these trends.

Furthermore, with the increases of the service sector in the economy and the increases in technology and the global economy, there is a growing tendency for the workers to be required to operate in a 24/7- work environment. Many in this 24/7 economy occupies low-wage, high-demand service jobs, requiring them to have second jobs to make ends meet.

The effects of work intensification are reflected in the physical and mental strain of an individual and work-family conflict. In general, work intensification can be understood as an elevation of the work effort. It is a process of expected greater demands in work load of employees by adding more tasks which need to be done in a shorter period of time or in an increased number of work hours.

In this paper we will discuss these consequences of higher intensification for employees' wellbeing in the case of Slovenian workers and their organizations. We will try to find out in which cases these consequences are not so detrimental. The paper is organized as follows. First, we review the intensification concept and the literature of the quality of work life. Then we present the data and methods and introduce our hypothesis. The section of analysis is in the third part. We will finish with a conclusion.

Work intensification

Workers in this new economy are interacting with workers all over the world at all hours of the day and night. Although occasionally non-traditional working arrangements and schedules have been seen as beneficial to some workers, it is more than obvious that this is not the reality for many cases. U.S. Bureau of Labour Statistics (U.S.BLS, 2007) reported that the percentage of workers on flexible work schedule in the United States rose with the increase of the service sector and increases in technology and global economy. Many of them occupy low-wage, high-demand service jobs which require them to have second jobs to make ends need. Those who have a full-time work schedule in organizations across the globe get more a demanding work load and longer working hours. Even for those who hold full-time permanent jobs the QWL deteriorated in many ways.

In EU, these trends were obvious since the mid-1980s (Thompson & McHugh, 1990) and European Foundations for the Improvement of Living and Working (Eurofound, 2002) started to indicate the changes in the labour market. In addition, the economic crisis has had a strong impact on the EU economy and all this added up to job insecurity, longer working hours, the intensification of work and consequences are visible in health and wellbeing of employees (Eurofound, 2003). The trend was maintained throughout the 1990s, as is shown by European Fifth European Working Conditions Survey (Eurofound, 2010), which showed that in the last few years many changes were introduced in the work place that affected the working conditions of employees. There are some trends and specific situations in small economies or countries within the European Union, for example Slovenia, that even sharpen the picture of on-going changes.

European Fifth European Working Conditions Survey (Eurofound, 2010) showed that in EU 27 an average of 39.4% of respondents have reported these changes and 38.3% in Slovenia. Working hours increased in EU 27 for 16.5% of respondents and for 19.1% in Slovenia. Working at very high speed all the time or nearly all the time reported 22.8% of respondents in EU 27 and 38.5% respondents in Slovenia. Working more than 10 hours two times per month in EU 27 reported 9.9% respondents and 15.4% in Slovenia. Working more than 10 hours two times per month in EU 27 reported 8.8% respondents and 13.3% in Slovenia. Working schedule is more than EU 27 average (61.1%) determined by the company in Slovenia (65.6%).

As a consequence of such trends, employees suffer greater stress; worsen wellbeing and greater work –family conflict. In EU 27 in average 18.2 % of respondents are facing difficulties in a reaching work –family balance and in Slovenia 24% of respondents reported such difficulties.

Quality of work life (QWL)

High job demand and a high workload lead to dissatisfaction with work (Reilly, 2012). When other goals such as family responsibilities, conflict with the work goal, employees become disenchanted and frustrated. Many researchers have shown that high job demands significantly diminished the wellbeing of employees on different dimensions such as anxiety, depressions, emotional exhaustion, burnout (Lee & Ashforth, 1996; Sevastos & Smith, 1992; Spector & O'Connell, 1994). The effect of high job demand on employee wellbeing is most evident in studies examining work-family conflict (Frone, Yardley & Markel, 1997; L.B. Hammer & Zimmerman, 2011).

The concept of QWL can be understood: (1) as an organizational process; (2) as an attribute of organizational environments, and (3) in terms of employee reactions to such organizational processes and environments. But there is not clear definition of the term. Hammer and Sanchez (2007) identified QWL: ‘as a personal reaction to the work environment and experiences such as perceptions of control, satisfaction, involvement, commitment, work-life balance, and the wellbeing in relation to someone’s job and organizations, with no one generally accepted definition of the term’ (p.651).

The model of QWL introduced by Sirgy, Efraty, Siegel and Lee (2001) is based on two theoretical perspectives: The Need Satisfaction Theory (Maslow) and The Spill-Over Theory. (1) Employees are satisfied with work up until the level that they experience the fulfilment of the needs that contributed to the QWL.(2) Satisfaction in one domain of life that spills over to other domains of an individual’s life. Roland and Li (2011) see QWL as a junction of expectations and real state of the job and employment. Martel and Dupuis (Martel & Dupuis, 2006) developed a model based on broader quality of life. They introduced ‘Quality of working life systemic inventory’ which measures 33 domains and dimensions of life. Eurofond uses terminology of ‘quality of work and employment’ which consists of four dimensions: (1) security of qualifications and employment; (2) health and the wellbeing of employees; (3) competencies development; (4) work-life balance (European Foundation for the Improvement of Living and Working, 2010).

Data and Method

Indicators of Work Rate Constraints and Work Intensification

Work intensification in various industries is assessed in terms of the evolution of the constraints on work rates. Compared with indicators of subjective work intensity: for example, when employees state that they are always or often forced to hurry when carrying out their work or have to cope with high work rates or tight deadlines— indicators based on exposure to constraints on work rates have the advantage of being less sensitive to the subjectivity of questionnaire responses. Furthermore, subjective measures of work intensity are ultimately dependent on work rate constraints. This is confirmed by the logistic regressions carried out on the basis of data from the 1998 *French Working Conditions Survey* (Valeyre, 2004) or the 2000 *European Working Conditions Survey* (Eurofound, 2000). The evolution of the different indicators of work rate constraints is measured by differences over time in the number of workers who state that they are subject to particular work rate constraints. Valeyre (2004) used six types of constraints on work rate that were identified on the basis of the working conditions surveys.

Our indicators of *work intensification* are indicators of subjective work intensity and it is composed of 7 variables which were calculated by factor analysis: ‘Today I work for my organization much more than I used to ten years ago’ (.560); ‘I cannot find time to work outside my paid employment to improve my living standard’(.583); ‘I have too much work to do manage on my own’ (.681); ‘I am constantly in hash time at my work (.774); ‘My job is stressful’ (.672); ‘I am swamped with work’ (.576); ‘The work demands at my job have increased over the last 3 years’.

To analyse the impact of intensification on employees and an organization we performed PCA for the following dimensions: work-family conflict, employee commitment, job satisfaction, and organizational performance (success and innovativeness).

Indicators of Quality of work life

Sirgy et al. (2001) developed a scale measuring the level of needs fulfilment at work based on behaviour, resources and results. Martel and Dupuis (2006) introduced 'Quality of working life systemic inventory' which measures 33 domains and dimensions of life. Sutela (2006) designed a research with qualitative and quantitative measurement with 4 dimensions of QWL: (1) physical aspects of the work environment; (2) mental and social aspects of the work environment; (3) health and stress; (4) the labour market, family and context. The Fifth European Working Conditions Survey (2010) includes many aspects of work conditions and employment. For our purpose we selected the following indicators of QWL:

1. For the family - work conflict PCA reveals two factors which explained the 61% variability and included two directions of the conflict. These factors are negatively related.

First factor is the conflict in direction from work to family: 'Because of the time spent at work I miss family activities' (.577); 'I often come home from work so exhausted that I cannot contribute to family life' (.582); 'My success at the workplace does not help me in being a better parent or partner at home' (.569). *Second factor*, is the conflict in direction from home to work: 'Because of the time spent at home I miss my responsibility at work' (.764); 'I have a hard time concentrating properly at work because of stress caused by family responsibilities' (.791); 'My appropriate and indispensable behaviour at home is unsuccessful at work' (.752).

2. For the dimension of employee commitment PCA revealed a two-factor solution, which explained 49% of the variability regarding employee commitment: *First factor* is affective commitment (Meyer, and Allen, (1997): 'I would gladly base my entire career working for this organization' (.748); 'I enjoy going to work every day' (.758); 'I am determined to work harder in order to keep my job regardless of higher wage' (.542). *Second factor* is calculative commitment: 'I have fewer opportunities to leave/change my organization' (.709); 'One of the main reasons I stay in the organization is the feeling of moral obligation towards it' (.723); 'I am prepared to work harder only in case of a higher wage' (.532).

3. Job satisfaction: 'How satisfied are you with your job'?

Indicators of the consequences of intensification of work for an organization

Fairris (2004) examined the relationships between work intensification and economic performance. Relationships between work intensification and the increase in labour productivity are identified in manufacturing industries, except in process industries. He found that labour intensity and labour productivity are unconnected. We also looked at the consequences of intensification of work for the organization. We took two indicators of organizational performance into account.

Successful of organization: 'Tell us how successful your company/organization is'? (1-3)

Innovativeness of organization: PCA revealed a *one factor* solution, which explained 53% variability regarding organizational innovativeness): 'Our organization enables employees to be creative at work' (.629); 'Our organization encourages employees to be innovative at work' (.836); 'Our organization reacts properly to employee proposals for improvements' (.812); 'In our organization new knowledge is used for product, service and process improvement' (.773); 'Our organization creates new products, services faster than our competitors do' (.548).

Indicators of the moderating variable

Organizations seek to influence the unfolding stress and employees' wellbeing as consequences of increased work intensification. They have adopted a variety of strategies to reduce strain and improve wellbeing. Extensive research has assessed the interaction between

environmental characteristics, such as job demand, and wellbeing. The concepts that were used were moderation, contingency and buffering (Griffin & Clarke, 2011).

We performed PCA that reveals 1 factor which we assumed to explain relation of organization to employees and their wellbeing (eigenvalues around 1 and explained 56% of variability in the space of selected variables for HRM practices): *First Factor*: Organization respects employees' needs: 'Our management takes employees' needs into account (factor loading'(.829); 'My organization took measures to reconcile the work - family balance' (.750); 'My organization motivates employees to take part in education and training' (.794).

We will present data from Slovenia where the questionnaire was carried out on a random multistage sample of the Slovenian adult population with the realisation of N=1082 respondents. The actual number of respondents in our analysed sample is somewhat lower (about N=500) due to the fact that only the employed population was the target of the analysis. The fieldwork was done from July to August 2011.

Hypotheses

Karasek et al (1998) proposed that the interaction could reflect the joint effect of demands and control on strain via an additive effect, given that multiplication terms are difficult to detect in practical situation. Warr (1994) suggested that relationships between environmental characteristics, such as job demands, and well-being are nonlinear. The existence of nonlinear relationships is problematic for testing interactional effect. Although the theoretical basis for individual moderators is elaborated in these studies, an overall framework for selecting substantively different types of moderators has not been established yet (Griffin & Clarke, 2011).

Our hypothesis is as follows:

H1: Organizations that take into account the needs of employees (career development and work family balance) do not produce negative effect of high intensification of work on QWL of employees that includes:

H1a: job satisfaction

Sirgy et al (2001) developed the need Satisfaction theory to capture QWL and stated that people are satisfied with their jobs to the point of satisfying their needs. They account for seven needs that are the framework for the QWL (the need for health, economic needs, social needs, the need for respect, self-fulfillment, knowledge and aesthetic needs. Svetlik and colleagues (Ilić & Svetlik, 1996) studied the QWL by satisfying the four groups of the needs (material, safety, social and personal needs).

H1 b: affective commitment

If an organization takes into account the needs of its employees (career development and work family balance) the affective commitment will not decrease because of higher intensification of work. Affective commitment has many predictors. First source of commitment comes from the employee's individual attributes such as gender, age, tenure, marital, professional skills, ability, values, beliefs. The literature finds a positive, though not very strong linkage between these characteristics and different levels of commitment Meyer and Allen (1991). The second source of commitment comes from job characteristics. These are aspects of the individual employee's job and tasks that shape how the individual perceives his or her particular role in the organization. Mathieu and Zajac (1990), Iverson and Buttigieg (1999) and Steers (1977) showed that the level of autonomy, the variety of skills and the challenges involved in the job to have a significant effect on affective commitment. Third

source of commitment comes from organizational factors. Employee perceptions about organizational procedures, goals, HRM policies can have indirect effect on commitment via work characteristics. HRM policies and practices for example can exert direct impact on individual outcomes in organization such as creativity, productivity, discretionary effort (Wright & Kehoe, 2008). Gardner, Moynihan, and Wright (2011) found that the motivation and career opportunity focused bundles of HR practices positively related to affective commitment and negatively related to turnover.

H1c: calculative commitment

If an organization takes into account the needs of its employees (career development and work family balance) the calculative commitment will not decrease because of higher intensification of work. Allen and John (1990) argued that calculative commitment develops as a result of anything that increases the costs of leaving the organization. They suggest that employees who invest considerable time and energy mastering a job skill that may not be easily transferred to other organizations are ‘betting’ that the time and energy invested will pay off with continued employment in that particular. Meyer and Smith (2000) findings point to the presence of a positive association between competence development practices and calculative commitment.

H1d: work-family balance

The home-work interface is a distinct topic in stress literature (Griffin & Clarke, 2011). Meta-analyses have explored the antecedents and consequences of work-family conflict, generally supporting the proposition that work stressors have an impact on the extent to which work interferes with family life (Byron, 2005). The social environment at work can act as a moderator of the stressor-strain relationship. Research (Hammer & Zimmerman, 2011) suggests that organizational contextual effects of a supportive organizational culture, supervisor, or mentor are all beneficial in reducing work-family conflict. Evidence that social support moderates the stressor-strain relationship is mixed despite a large numbers of studies. Partial evidence was reported by Viswesvaran et al. (1999), Bliese and Castro (2000) and de Jong (2006). Viswesvaran et al. (1999) found accumulate R^2 of 3% across studies in their meta-analysis. *We suggest that if organization takes into account the work family integration, the higher intensification of work will not escalate the work-family conflict.*

H2: Organizations that take into account the needs of employees (career development and work family balance) do not produce a negative effect of high intensification of work on the success of an organization.

Green (2004) stated that the intention to increase the productivity with a higher intensification of work does not lead to higher efficiency. Gollac (McKeown, 2011) goes even further and argues that it is important not to equate intensification of work with efficiency. Green (2004) warns against long-term consequences of increased intensification of work for troubles of many economic sectors. Growing documentation of the dynamic interplay (flexible work schedule, teleworking and working at home) between work and family demand, supported by organizations, can have a beneficial effect on individuals’ health and wellbeing as well as on organizations’ bottom lines in terms of decreases in absenteeism and turnover and improvements in overall market performance (Hammer & Zimmerman, 2011). Although most of these relationships remain relatively small, accounting for anywhere between 3% and 15% of variance in health, the wellbeing and organizational outcomes. Hammer and Zimmerman (2011) argue that these affects are practically significant, especially with respect to worker and organizational health outcomes.

According to challenge-hindrance model of stress LePine, Podsakoff, and LePine (2005) account for inconsistent evidence of the relationship between stressors and performance. Within this framework, stressors can be appraised as challenge or hindrance. When stressors (including job and role demands) are appraised as challenges, positive emotions are evoked and active coping strategies are engaged. This could lead to better performance because individuals are likely to believe that there is a positive relationship between effort and expectancy.

H3: Organizations that take into account the needs of employees (career development and work family balance) do not produce negative effects of high intensification of work on innovativeness of an organization.

One of the important links to enhanced wellbeing is proactive work behaviour (Grant & Ashford, 2008). This behaviour is defined as taking initiative in improving current circumstances, it involves challenging the status quo rather than passively adapting present conditions (Grant & Ashford, 2008). Examples of proactive behaviour include generating and implementing new ideas and taking the initiative in problem solving. Innovative work behaviour (IWB) is defined as the sum of work activities employees carry out for innovation development (Messmann & Mulder, 2012). Innovations are crucial for organizations to ensure their effectiveness and competitive advantage. In modern work contexts it is increasingly necessary to develop new ideas that lead to a significant change. Organizational support for IWB is crucial to foster such behaviour. Supervisor support for example refers to the perception of psychological and physical assistance by one's supervisor (De Jong & Den Hartog, 2010) and fosters IWB by enabling employees to deal with feelings of uncertainty and perform more task-oriented. Organizations with high level of intensification that do not take into account the needs of employees to develop and do not offer support to employees in reconciling work and family life, will not be an innovative organization. To foster IWB in organization with high work intensification organization needs to take employees needs into account.⁶

Results

In table 1 the results of Regression analysis are listed. There can be seen the level of explained variance and level of significance. We also added results of interactions among variables (what are levels of dependent variables in the case of high or low level of **Organization respects employees' needs** (career development and work family balance)⁷.

Table 1. Results of regression analysis for *Organization respects employees' needs* are listed

Dependent variables	Organization respects employees' needs (career development and work family balance)			
	Explained Variance	Sig.	High Intensification	
			Low Respect	High Respect
Organizational Innovativeness	15%	.000	13.9	18.4
Organizational Success	5%	.000	.55	.93
Work-Family Conflict	22%	.000	10.5	10.5
Affective Commitment	8%	.000	5.4	7.0
Calculative Commit	5%	.000	6.4	5.6
Job Satisfaction	9%	.000	3.3	3.7

⁶ The Model can be obtained by the authors.

⁷ The Graphs with interaction effects can be retrieve upon by the authors.

In organizations with high level of intensification that do not take into account the needs of employees to develop and do not offer support to employees in reconciling work and family life, employees suffer a considerable deterioration of their well-being. Conflict of work-family is high: because of the time spent committed to work they are missing out on family activities; often they come home from work emotionally exhausted that they cannot contribute to family life; behaviour that is effective at the job does not help at being a better parent and / or partner at home.

1. The impact of increased *Intensification of work* on the *Work-family conflict* is strong and leads to negative effects on employees.

If an organization takes into account the needs of employees (career development and to achieve a work-family balance) calculative commitment decreases, affective commitment and employee satisfaction increase or do not decrease as rapidly and strongly as they would in the case where the organization does not respect the needs of employees. An organization can prevent dissatisfaction of employees in the conditions of high intensification, if the organization provides support to maintain a work-family balance for its employees.

With the increase of intensification, the affective commitment of employees decreases, yet far less so if the needs of employees are taken into account.

In the event of an increased intensification of work, an organisation must introduce HRM practices in order to maintain the affective commitment of employees if it wants to avoid the negative effects that are associated with the low level emotional commitment of employees (lower the quality of work, less civic is the behaviour of employees, etc.).

2. The effect of increased *Intensification of work* on *Innovation and the Success of an organization*.

With bad consideration for the needs of employees (career development and to achieve a work-family balance) and the increase in the intensification of work, innovation suffers a slight decline. When taking the needs of employees into account (the career development and to achieve a work-family balance), despite the high intensification of work, innovation slightly increases.

If an organization takes into account the needs of employees (career development and to achieve a work-family balance), the success of the organization grows. If the organization does not take into account the needs of employees, the organization's success decreases.

Conclusion

An organization can introduce many programs and policies to improve the quality of working life and help employees sustain their wellbeing by introducing different interventions. Griffin and Clarke (2011) noted that interventions that the target quality of working life at an organizational level and cover short and long-term range cannot just improve the wellbeing of employees but also enhances the industrial relations, work climate and performance of an organization.

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Satisfaction with work-life balance amongst call centre operators in South Africa

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Abstract

This study examined the nature, antecedents and outcomes of satisfaction with work-life balance (SWLB) amongst call centre operators (N = 265) in South Africa. Past Euro-American research evidences an inverse relationship between long work hours and work-life balance and a positive relationship between work-life balance and work engagement. Call centre operators typically work long hours and there are serious concerns about the work-life balance of call centre operators and the social sustainability of call centre work. This study hopes to contribute both theoretically and empirically to the evolving body of knowledge about the dynamics of work-life balance amongst call centre operators outside Europe and North America.

Introduction

Call centres are highly stressful and demanding workplaces (Tuten & Neidermeyer, 2004), which have enjoyed sustained research attention (Werner, 2006). With South Africa in the same time zone as Europe and with its relatively low labour costs, the call centre industry is growing (Benner, Lewis & Omar, 2007) and attracting foreign investment (Gauteng Enterprise Propeller, 2010) to the extent that it is recognised as an important industry for national economic development (Bhorat & Van der Westhuizen, 2010). Call centre operators play a crucial role in the value chain of many organisations (Gordi, 2006) but often work on long shifts outside regular office hours, disrupting regular patterns of work-life interaction. It is therefore a social and business imperative to understand how call centre operators appraise the balance between their work and life responsibilities and to assess the effect of any such appraisal. A holistic appraisal of work-life balance is a source of satisfaction (Kirchmeyer, 2000), not reliant on assumptions regarding the temporal preferences of individuals. This sense of perceived satisfaction with work-life balance can be termed satisfaction with work-life balance (SWLB).

Satisfaction with work-life balance (SWLB) represents a broadening of the construct, satisfaction with work-family balance, introduced by Valcour (2007). She defined satisfaction with work-family balance as the overall degree of contentment that results from the positive appraisal of successfully achieving a balance between competing work and family role demands. The definition implies distinct cognitive and affective components (McNamara, Pitt-Catsoupes, Matz-Costa, Brown, & Valcour, 2012). The cognitive component is the perceived success in meeting multiple demands from multiple roles and the affective component is the emotional attachment to this appraisal of success. The definition assumes that people will want to experience satisfaction by balancing work and family demands (Friedman and Greenhaus, 2000). Low levels of work-family conflict or high levels of work-family enrichment will not necessarily result in satisfaction. Rather, it is the overall experience of contentment as perceived by the individual. It is a holistic assessment without dimensionality or directionality, as per other work-family constructs (e.g., Greenhaus and Beutell, 1985; Frone, 2003).

This study investigates work hours as a predictor of SWLB, as suggested in the literature (Kazdin, 2000; Rogelberg, 2007). To advance understanding of this relationship, this study examines the moderating effect of job control and gender on this relationship and controls for emotional stability, number of children, number of children under 6 years, commuting time to work, and ideal work hours.

Work hours. Work hours are negatively appraised and inversely related to SWLB when spending more hours in one domain means spending less time in another domain in which the individual wants to spend more time (McNamara, et al, 2012). Long work hours may be appraised positively appraised if work is regarded as enriching and fulfilling to the extent that the employee wants to spend more time at work. An employee may wish to spend less time with their family, spend more time with interesting associates, develop skills at work, improve promotion possibilities, or increase self-esteem and income (Valcour, 2007).

Job control. Control is the belief that one can exercise some level of influence in order to improve one's environment or to manage certain aspects of one's environment better (Thomas and Ganster, 1995). Job control is a term used to refer to an employee's perceived control over their job or work circumstances; that they can independently control aspects of their job (e.g., involvement regarding work schedules, work hours, and job tasks). Landy and Conte (2008) noted that stress arises from jobs in which job demands are high (i.e., workload or intellectual demands) and job control low (i.e., autonomy to use discretionary skills). A sense of control may alleviate stress, allowing employees to effectively manage aspects of their personal and work life and consequently experience greater satisfaction with the balance between their work and life domains. The assurance that one can make a short telephone call during working hours (and allow one to meet a personal role demand) may be a significant influence on satisfaction (Valcour, 2007). Control over one's work hours increases one's ability to fulfil demands at work and in one's personal life without suffering detrimental effects or experiencing negative consequences in either role domain (Thomas & Ganster, 1995; Valcour, 2007). Control over work hours provides a choice regarding time spent on work-related activities (McNamara, et al., 2012) and this may result in greater satisfaction that in turn strengthens overall SWLB. Related studie shave found a relationship between control and job satisfaction (Batt and Valcour, 2003; Thomas and Ganster, 1995).

Emotional stability. Emotional stability is the opposite of the Big Five personality factor neuroticism (Bruck and Allen, 2003; Saucier, 1994; Valcour, 2007). Individuals who display high levels of neuroticism will have the tendency to be emotional, worry a lot and be easily upset. This implies that they may be intolerant of managing their stress effectively. Conversely, individuals with high emotional stability display characteristics of being even-tempered and calm in stressful situations. This implies that they will be able to handle stressful situations better and are likely to manage their impulses when coping with stress (Bruck and Allen, 2003). Low emotional stability will lead to more negative appraisals of situations and a tendency to experience lower levels of satisfaction with work-life balance (Bruck and Allen, 2003; Valcour, 2007). For this reason, emotional stability is included in this study as a dispositional control variable.

Work engagement and satisfaction with work life balance. Work engagement is a construct that emerged from the positive psychology movement; it focuses on wellbeing (Bakker, Schaufeli, Leiter and Taris, 2008). Work engagement is as a positive state of mind associated with one's work that is characterised by vigour (high energy and resilience); dedication (associating and experiencing significance, enthusiasm and pride in one's work; and

absorption (being engrossed and fully concentrating on one's work) (Bakker et al., 2008; Schaufeli, Bakker and Salanova, 2006). Work engagement is a persistent state, not a once-off reaction to a positive experience. While there are competing theoretical models of work engagement, most agree that work engagement is increasingly expected by organisations (Bakker et al., 2008).

The above gives rise to the following propositions that were investigated in this study:

Proposition 1: Work hours is negatively related to satisfaction with work life balance.

Proposition 2: Job control and gender moderate the relationship between work hours and satisfaction with work life balance.

Proposition 3: Satisfaction with work life balance is positively related to work engagement.

Method

Research design, participants, and measures

A descriptive cross-sectional design was used (Hair, Babin, Money, and Samouel, 2003) and a self-administered, cross-sectional survey was used to gather data. Participants were 264 call centre operators (58.6% response rate). Approximately half the participants were permanent employees; others were on a variety of work contracts. The majority of participants were female (67%), under 30 years old (72%), single (71%) and a parent (51%). Most (70%) had worked for their current employer for more than five years. Participants responded to a self-administered survey questionnaire that contained the following measures, all of which had been validated and had high internal consistency reliability in previous studies:

Satisfaction with work-life balance. Six items were adapted (with the word life replacing the word family) from Valcour's (2007) scale and measured using a five-point dissatisfaction-satisfaction Likert scale.

Work hours. Three aspects of work hours were measured: the sum of reported work hours and overtime hours in a typical week (Lu, Kao, Chang and Cooper, 2011), commuting time and the respondent's ideal number of work hours.

Job control. Items were drawn from three scales; five items from Valcour (2007), six items from (Sims, Szilagyi, & Keller, 1976) and three items from Thomas and Ganster (1995). The items measured how much control respondents believed they had over the time that they spent at work. The response categories for the first two sets of items was a five point disagree-agree Likert scale but the response categories for the Thomas and Ganster items ranged from (1) none to (5) a great deal.

Work engagement. Engagement was measured using the nine item abridged Work Engagement and Well-being Survey (Schaufeli et al., 2006). The items were scored on a seven-point frequency with the categories ranging from 0 (never) to 6 (always). Scale items included perceptions of feelings of vigour, energy and enthusiasm; immersion in ones work and a sense of pride experienced while working.

Emotional stability. Emotional Stability was measured using the subscale of Saucier's (1994) Mini-markers. Respondents were asked to indicate on a frequency of one to nine how accurately four adjectives described them.

Demographics. A set of demographic questions (i.e., age, marital status, parental status, level of education attained, job tenure and job level) was solicited to help describe the sample and, if possibly related to SWLB, to use as control variables (i.e., number of children, number of children under 6, gender)

Results

Psychometric properties of the scales

Principal axis method exploratory factor analysis, using protocols established by Hair et al (2003), was used to examine the dimensionality of the scales. All six items loaded of SWLB loaded on a single factor (explaining 51% of the variance between the items; eigenvalue = 3.074; factor loadings ranged from -.471 to -.829; N = 264). The job control items loaded on a single factor (explaining 31% of the variance; factor loadings ranged from -.441 to -.667; eigenvalue = 2.502; N = 264). One factor was extracted for emotional stability (explaining 30% of the variance, factor loadings ranged from -.470 to -.608; eigenvalue = 1.198; N = 264). For work engagement one factor was extracted (explaining 45% of the total variance; loadings ranged between -.498 and -.817; eigenvalue = 4.068).

Table 1 shows Cronbach's alpha reliability coefficients for all the continuous scales (all of which exceeded the acceptable level of .7; all inter-item correlations exceeded .3 within each scale; Hair et al., 2003). All distributions were acceptable; the skewed distribution of age was expected given the sampling frame.

Correlation analysis

Table 1 represents the correlations matrix of all the variables, highlighting values at the significance level * $p < .05$. As expected, SWLB was positively correlated with job control and negatively correlated with work engagement.

Table 1. Mean, standard deviation, and correlation analysis

Variable	M	SD	Skewness	Kurtosis	1	2	3	4
1. SWLB	3.144	0.826	-0.293	-0.039	(.854)			
2. Job control	2.821	0.729	-0.106	-0.675	0.374*	(.777)		
3. Emotional stability	3.285	1.717	0.503	-0.412	-0.066	0.033	(.625)	
4. Work engagement	3.287	1.144	0.059	-0.439	-0.391*	-0.423*	0.005	(.877)

Note. N = 264 (after casewise deletion of missing data); * $p < 0.05$; Cronbach's Alpha reflected on the diagonal; M = mean; SD = standard deviation; SWLB=Satisfaction with work-life balance

Regression analysis

Table 2 (next page) presents a summary of the hierarchical regression analysis used to test the propositions. Job control (entered in Step 3) was a significant predictor of SWLB over and above the demographic and other control variables entered in Step 1 and Step 2. There was no interaction effect between perceived job control and work hours (entered in Step 4) or between job control and gender (entered in Step 5) in explaining SWLB.

SWLB explained 15.3% of the variance in work engagement ($R^2 = .153$, $p < .0001$, N = 264), in an inverse relationship ($\beta = -.391$, $p < .0001$). Job control was a positive and significant predictor of work-life balance ($\beta = .335$, $p < .001$).

Table 2. Hierarchical regression analysis: DV = Satisfaction with work-life balance (SWLB)

Variable and statistic	Standardised betas				
	Step 1	Step 2	Step 3	Step 4	Step 5
Gender	-0.029	-0.020	-0.043	-0.042	-0.036
Number of children	0.009	0.013	-0.006	-0.007	-0.004
No. of children under 6	-0.055	-0.050	-0.016	-0.015	-0.018
Emotional stability	-0.100	-0.105	-0.109	-0.109	-0.103
Commute time	-0.148*	-0.152*	-0.097	-0.098	-0.092
Ideal work hours	-0.057	-0.037	-0.027	-0.024	-0.021
Actual work hours		-0.081	-0.057	-0.147	-0.147
Job control			0.337**	0.336**	0.333**
Work hours x Job control				0.090	0.115
Work hours x Gender					-0.057
F	1.549	1.514	4.769	4.229	3.858
Df	6, 206	7, 205	8, 204	9, 203	10, 202
Multiple R ²	0.043	0.049	0.158**	0.158**	0.160**
Adjusted R ²	0.015	0.017	0.125	0.121	0.119
Change in R ²		0.001	0.108	-0.004	-0.002

Note. *N* = 213 with casewise deletion of missing data; * = *p* < .05; ** = *p* < .0001

Discussion

The key contributions of this study include:

1. Psychometric results demonstrating the portability and relevance of the SWLB construct outside Europe and North America.
2. Findings that evidence the direct effect of perceived control on SWLB, even in the most highly structured of jobs.
3. Contrary to previous research, finding that demographic variables (i.e., gender, number of children, number of children under six) do not necessarily influence perceptions of SWLB.
4. Consistent with Valcour (2007), finding that there was no significant relationship between hours worked in a week and satisfaction with work-life balance. McNamara et al. (2012) found a negative correlation between work hours and satisfaction with work life balance, which is consistent with the resource drain perspective. Possible reasons for the findings in this study is that for participants, overtime was voluntary and in the interest of job preservation. The single status of 71% of participants, their relative youth (mean age of 27) and their strong career focus (Ford, et al., 2007) may also help explain why the participants did not have a problem with working long hours and may even have appreciated it as an opportunity to be noticed as an above average work performer. Interestingly, despite over half the participants having children (51%) and even most of these having children under the age of six (75%), there was still no relationship between work hours and SWLB.
5. Emphasising the importance of control over work; this was a significant predictor of SWLB. This finding is consistent with Batt and Valcour's (2007) understanding that job control tends to decrease stress (and by extension therefore increase the possibility of perceiving SWLB) and Grebner, Semmer, Faso, Gut, Kälin, and Elfering's (2003) contention that lack of control was related to depression amongst call centre operators while job control was related to lower levels of work-life conflict. Future research should consider whether or not this relationship applies across job levels and how increased job control affects team members in work contexts governed by rigid work schedules.
6. An unexpected result regarding the relationship between job control and work engagement was that job control had a significantly negative relationship with work engagement. It is possible that this is a function of call centre work, where employees do

not actually have much job control and that the limited job control they have is so tightly regulated and closely monitored that it actually decreases work engagement.

7. Consistent with Valcour (2007), this study found a significantly negative relationship between commute time and SWLB. Time spent in getting to work in traffic is stressful. This has implications for organisations when considering the location of work premises and its proximity to public modes of transport.
8. There was a significant negative relationship between SWLB and work engagement. Those highly engaged at work may be unconcerned about work-life balance or are so engaged that the extra attention they receive from management is so stressful that it adversely affects the relationship between their work engagement and their satisfaction with work-life balance (Bakker et al., 2008). A further possibility is that their work is not perceived as intrinsically engaging and they do not identify with their work to the extent that work engagement would ever be possible. The possibility of measurement artifacts or socially desirable response patterns should be controlled in future studies.
9. Valcour (2007) indicated that having more children would impact on resources to fulfil other roles and subsequently strain the individual in not meeting all demands and thus implies less satisfaction with work-life balance. In this study, even including the effect of having very young children did not explain significant variance in SWLB. This may be due to the low average age of respondents or the pervasive availability of domestic help in the South African context. Future research should investigate this further.
10. Emotional stability did not significantly correlate with any variable, despite being so implicated in other work-life conflict studies (Bruck & Allen, 2003). Emotional stability was not a predictor of SWLB or work engagement in this study,

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What job characteristics are preferred by high potential undergraduate students?

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Abstract

Organizations have serious issues to attract and retain high performer's employees due to a competitive job market. Then, the aim of this paper is analyzed what job characteristics are preferred by high potential under graduated students by means of analyzing their values (self-oriented, goal oriented, security and materialism values). We collected 355 students sample (231 from Mexico and 124 from USA and UK). We compute multi-group analysis and mean differences test. Results show that there are differences between Mexicans and Anglo-Saxon students in relation to preferences for some job characteristics and values. Providing guides of how attract, select and retain best potential student of higher levels universities to practitioners.

Introduction

Last decades, globalization has been a determining factor in the daily lives of people. Then, hard market competition and best standards of quality in product have been necessary to be competitive in this scenario.

Organizations reinvent themselves to seek any means to make a difference and become more competitive. They could improve two types of resources. On one hand, a company should focus on tangible resources to create a competitive advantage over competitors. Nevertheless, such benefits can only be enjoyed by a certain time and have the disadvantage of being easily imitated: these advantages include economies of scale and financial resources that a company has. On the other hand, the intangible resources of an organization are particularly important, since it is possible to create competitive advantage and is difficult to imitate for others competitors. Among intangible resources are included: prestige, brand loyalty, and human capital of a company. Latorre (2012) deals with the most important asset to any company are their human resource. Therefore, large organizations are committed to develop and attract the best human capital to have the best human resources practices (Guest, 2004).

From this point of view, the best companies of the future will be those that attract, engage, develop and retain the most talented employees (O'Leary et al., 2002). For that reason, it is necessary to find and hire this kind of employees. Hence, organizations must invest to attract and retain talent employees. Some contingencies experienced by the market in recent years, such as the economic crisis and the globalization of markets have increased the difficulty of enterprises in recruiting employees. This has created a "war for talent" among organizations, so the role of the recruitment and selection process increases its importance (Yakub Khan & Aslam, 2011).

Research on the subject of recruitment has received much attention, but despite this, there are questions about attracting applicants who have not yet been answered in a deep way. These questions emphasize the need to attract the best candidates in an efficient and inexpensive way, but there is no formula for it. Furthermore, it has not focused on the nature or content of the information required for the organization to persuade applicants to apply to certain company (Roberson, Collins & Oreg, 2005).

Some authors believe that the best way to attract the best talent is to focus on the similarity between the individual and the organization (Kristoff Brown, Zimmermann & Johnson, 2005). Others emphasize reputation or image that applicants had of any company to explain why they are attracted to them (Konrad, Ritchie, Lieb & Corrigan, 2000). Additionally, Gomes and Neves (2010) research also states that managers successfully attract the best talent by focusing purely on the characteristics of each position and not in an organization). The fact is that no current theoretical basis could totally explain how recruitment practices attract applicants. However, it has not taken into account characteristics of individuals and their values along with the culture of a company. Both could help to understand the reason for what an individual wants to belong to a company and not to another one. Additionally, a position could offer very different features and benefits to another post even within the same organization.

Based on the problem that has arisen in the field of recruitment and selection of talent, the question arose that this paper seeks to answer: Is it possible to clarify the type of position that an individual finds attractive based on their personal values and characteristics? Are young and talented people attracted to some job characteristics and no others? Could cultural differences between countries moderate this attraction?

We select a range of values that are considered good predictors of high potential performance and commitment of young people and. Following Lagunas (2012), if students are high in this value, we consider them a high potential talent. Additionally, these set of values (goal orientation, self-direction, security and materialism) could be related to preferences to some job characteristic. Then, we check if these values could be related to compensation, variety, job security, autonomy and feedback

Therefore the main objective of this paper is to analyze, through an exploratory analysis, preferences based on job characteristics (following the model of Hackman & Oldham) among students from USA, UK and Mexico that have high levels of values in achievement, self-direction, security and materialism which are considered positive for performance. Previous research has identified the impact of certain values on the preferences of individuals and could predict what are the characteristics of the job for which they are attracted (Judge & Cable, 1997; Vroom, 1996; Judge & Bretz, 1992; Ritchins & Dawson, 1992). But, to our knowledge, no one has tested relation of these values to job characteristic of Hackman and Oldham model. Additionally, we analyze if there are differences between individualistic (UK and USA) and collectivistic (Mexico) cultures of high potential students to feel attracted for a type of job characteristic or another one.

Method

Sample

To validate questionnaires in a Mexican culture, a small sample (N=30) of Mexican students of a prestigious universities was collected in February of 2013. After that, to conduct the study a sample of 231 students from Mexico and 124 students from USA and UK belonging to universities of acknowledged prestige was collected from May to September of 2013. Mexican sample was 58% man students between 18-26 years students of economic or management area from 3 different universities. USA and UK sample was composed of 52% man students between 18-27 years students of economic or management area from 4 different universities of excellent universities (2 from USA and 2 from UK).

Data analysis

To carry out this research, survey methodology was used. We carried out the necessary preliminary studies for the validation of the questionnaire: back translation, reliability and validity. To test our hypothesis, we compute multi-group analysis and mean differences test

Results

Results showed that there were differences between Mexican and Anglo-Saxon students in levels of individualism. Then, Anglo-Saxon students were more individualistic than Mexican students, and also there were differences among job characteristics preferences autonomy, variety and materialism (see Table 1).

Table 1. Descriptives and mean differences of study variables

Variable:	Mean		SD		t-test
	México	USA & UK	México	USA & UK	
Schwartz goal-oriented	3.84	3.99	0.84	0.75	-1.54
Schwartz security	3.51	3.59	0.89	0.92	-0.82
Schwartz self-oriented	4.25	4.20	0.66	0.68	0.61
Individualism	3.56	2.66	0.93	1.13	8.68**
Job security	3.55	3.42	1.08	1.50	0.86
Compensation	4.03	4.11	0.89	0.84	-0.83
Materialism	2.85	3.22	0.67	3.22	-4.31**
JCHM Autonomy	3.26	3.60	0.73	0.88	-5.56**
JCHM Variety	2.76	3.35	0.85	0.78	-7.64**
JCHM Feedback	3.61	3.61	0.87	0.83	0.01

*p≤.05, **p≤.01

Then we performed multi-group analysis and found that there were differences. Collectivistic students showed different the relationships between their values and preferred job characteristics than individualistic students (see table 2).

Table 2. Multi-group fit indices

Model	SB χ^2	df	RMSEA	<RMSEA>	NNFI	CFI
Fixed Model	87.68	44	0.076	0.052;0.099	0.887	0.931
Free Model	41.08	23	0.067	0.032;0.10	0.911	0.971
Final model*	54.07	33	0.059	0.027;0.088	0.931	0.968

N=335*p≤.05, **p≤.01** Free parameters: security value related to job security. Security value and Materialism value related to compensation. Goal-oriented and self-oriented Schwartz values related to autonomy. Security Schwartz value and materialism value related to security Goal-oriented and self-oriented Schwartz value and security value related to feedback.

In deep, results showed that were not differences between free model and the best model offered by Lisrel program (Byrne, 1998). Then, the whole model was moderated by

individualism level of students. Specifically, we found significant differences between individualistic and collectivist students on the following relationships:

- a) Preference to stability at work (job security) was related to materialism ($\beta=.40$ $p<.01$) and security ($\beta=.24$ $p<.05$) value in collectivistic students ($r^2=.13$) but no value was related at individualistic sample ($r^2=.05$).
- b) Preference to high compensation was related to goal-oriented ($\beta=.27$ $p<.01$), security ($\beta=.19$ $p<.05$) and materialism ($\beta=.40$ $p<.01$) at collectivistic students ($r^2=.20$) and was only partially related to materialism ($\beta=.48$ $p<.10$) at individualistic ones ($r^2=.10$).
- c) Preference to autonomy was partially significant and positively related to goal oriented ($\beta=.08$ $p<.10$) and materialism ($\beta=.09$ $p<.10$) at collectivistic students ($r^2=.05$), but was negative and partially significant related to security ($\beta=-.11$ $p<.10$) at individualistic sample ($r^2=.04$).
- d) Preference to variety was significant and positively related to materialism ($\beta=.27$ $p<.01$) at collectivistic students ($r^2=.08$), but was negative and significant related to materialism ($\beta=-.20$ $p<.05$) at individualistic sample ($r^2=.10$).
- e) Preference to feedback was significant and positively related to self-oriented ($\beta=.38$ $p<.01$) and partially significant and negatively related to goal-oriented ($\beta=-.13$ $p<.10$) at collectivistic students ($r^2=.09$). At individualistic sample ($r^2=.16$), preference to feedback was significant and positively related to security ($\beta=.24$ $p<.01$) and variety ($\beta=.22$ $p<.05$).

Then, we found different relationships between the relationship between values and preferences on job characteristics depending on cultural differences. Additionally, we found significant means differences on materialism and individualism. There were differences on autonomy and variety in relation to job preferences.

Discussion

In this research, some results that are considered of great interest were obtained. We found that there is support for the idea of looking for a “fit” between beliefs and values of an individual and where they want to work (Schneider, 1987). Specifically, the applicant is attracted by the nature of the position offered in certain organization (Chapman et al., 2005) depending on the values that follows.

We choose personal values that are related to high potential performers in the literature (Lagunas, 2012). Taking into account cultural differences on our sample, we also checked to collectivism-individualism values. Additionally, we highlight the fact that our sample has similar characteristics and all of them was studying at degree related to Economy or Business Administration. Then, they shared a similar profile but they were studying in different countries, and we found differences between them. On the one hand, collectivistic students sample show that materialism value was related to compensation, security and variety in their preferred job post. Self-oriented was related to preference of feedback at post. Value of security was related to compensation and stability at post. At last, goal-oriented value was related to compensation. Then, if practitioners would like to attract goal-orientated, self-directed, ambitious and secure young potential applicants, they could enrich autonomy, feedback, variety and stability of this position at collectivistic cultures. According our results, that could attract and retain high potential applicants.

On the other hand, individualist students sample shows that materialism value could be related to preference to high compensation and feedback; and negatively related to variety. At

last, security value was positively related to preference for feedback at their job position. Therefore, if practitioners would like to attract self-directed, ambitious and secure young potential applicants, they could enrich autonomy, feedback of this position at individualistic cultures. Since for them, variety and stability is not important to them. According our results, it could attract and retain high potential applicants.

We also found differences between both samples on levels of materialism value and the preference to varied tasks and autonomy at job position. In addition, differences in the level of individualism - collectivism in different samples were presented. The Mexican sample can be characterized as a collectivist culture, while Anglo shown as a purely individualistic culture. It was found that these differences affect the context of job search (Van Hooft & De Jong , 2009) and also on which feature is most preferred to another, creating the need to adjust recruitment practices according to the place where want to attract and retain talent. Therefore, our results highlight importance to cultural and personal values in order to preferred job characteristics among others. Then, practitioners could increase autonomy and variety at post in individualistic cultures. However, it should be considered methodological limitations (biases of social desirability, acquiescence, etc.) and practices (sample size, and use of sample of convenience) could limit generalizability of this study.

Nevertheless, this study provide some guides to practitioners about what job characteristics could be highlighted in the recruitment and what could be potentiated in job design in order to attract high potential students in different cultures. Additionally, it opens new research questions about what really attract high potentials students and the need to analyze other job and organizational characteristics that they will be attracted to.

Summing up, throughout this work has been emphasized the need for companies to attract and retain the best talent analyzing young applicants' values. After analysis our results, we could conclude that young applicants with high potential take into account job characteristics to choose their jobs. Therefore, it could be interesting to enrich a position in order to attract and retain high potential talent to any organization, in the place of invest a lot of money to improve employer branding to increase reputation and image.

In conclusion, an organization with adequate recruitment practices and job characteristics could attract and retain high potential young applicants. Then, this organizational improve their intangible resources and a sustainable competitive advantage. To attract, attract and retain the best talent can prove to be the difference between success and failure of an organization in the medium and long term. Then, it could be profitable to redesign job characteristics to make more attractive a position to young and potentially high performers on the base of a particular desirable profile to any post.

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Motivation in the hospitality industry through leadership and emotional intelligence

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Abstract

The aim of this paper is to clarify the role of leadership and emotional intelligence in the motivational process of employees in the hospitality industry. Relevant literature is reviewed and a tentative model is presented to experts from the fields of leadership, emotional intelligence and the hospitality industry to see if any amendments were necessary. After having been approved by the experts, the model has been tested with structuring equation modelling (SEM) based on a quantitative research among employees and leaders of the hospitality industry in Germany. It could be shown that leadership is positively correlated with employee motivation. Such a relationship could not be shown for emotional intelligence, which might be due to the small sample size.

Introduction

With increasing comparability of hospitality services due to the availability of search engines filtering prices from various websites and the globalization of the competition within the sector, the need for hotels to distinguish themselves from their competitors is increasing. Since the facilities are mostly given for existing businesses and hard to change, services are usually used to make the difference. Friendly personnel, motivated to go the extra mile to meet the guests' needs are therefore one core asset for hotels in current days. The low income level at the hospitality industry in Germany combined with long working hours increase the need to find non-monetary motivators. This paper focuses on the role leaders can play in the motivation process of their employees. If leaders could motivate their employees by treating them in a certain way, many challenges of today and the coming years could be handled more easily. As an underlying construct, the concept of emotional intelligence of the leaders and its influence on their leadership effectiveness is taken into account.

Theoretical background motivation

One can differentiate three basic forms of motivation: negative motivation, positive motivation and individual techniques to motivate oneself. Negative motivation is the motivation described by Herzberg which leads to movement but not to really motivated action. Positive motivation means to give people the feeling that they are working towards a precious, achievable goal which is important to the community (Jost, 2000, p. 24). In general, motivation can be defined as the influence on thoughts, feelings and actions which serves to reach a desired end state. The desired end state is described by motives which in their sum form the motivation (see figure 1).

Theoretical background leadership

Researchers usually define leadership according to their individual perspectives and the aspects of the phenomenon of most interest to them (Yukl, 2006, p. 2). Leadership definitions can roughly be differentiated into goal-oriented, influence-oriented, vision-oriented and coordination-oriented. As a working definition, leadership is defined as the process of translating company goals into visions, which are understandable and shareable by different

stakeholder groups and influencing employees to share those visions and coordinately work towards them.

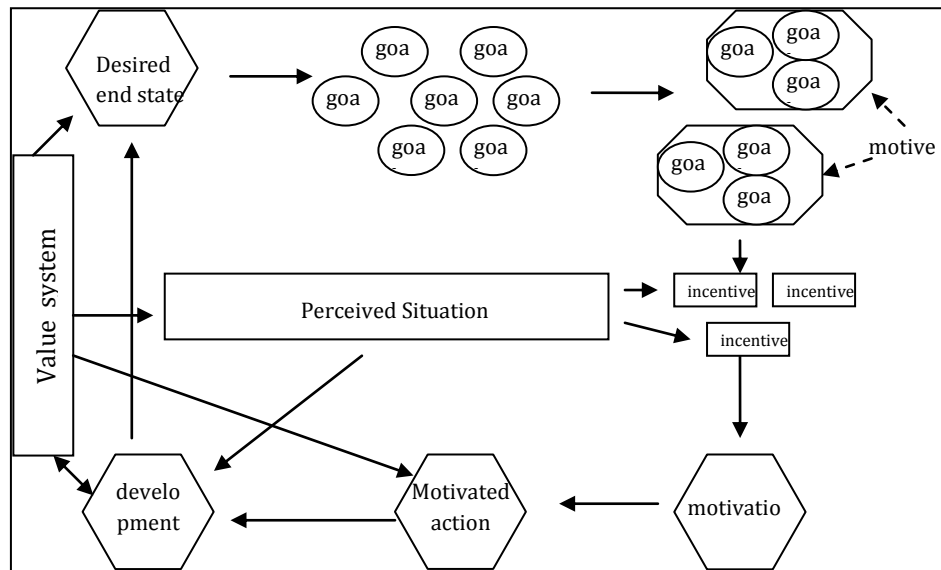


Figure 1. Motivational Process

Source: Author's illustration based on quoted literature

Over the decades, different theories have tried to answer the question what effective leadership is and how it can be achieved in a generally valid way. In the first decade of the 20th century, trait theories of leadership were dominant, assuming that certain characteristics of a person influence the quality of leadership. In the 30ths, leadership style theories were developed which assumed that the success of leadership depends on the style in which leadership is executed. Since a certain leadership style is not successful in all situations, situational leadership theories were developed in the 1960ths (Hungenberg and Wulf, 2006, p. 331). Today, 'Leadership' is again seen as the answer to increasingly challenging problems - including meeting increasing demands with constraints on resources (Storey, 2011, p. 3). After the paradigm shift in the 1980s, the focus of leadership theory research has not singled out traits or behaviors or the situation in which leadership occurs but has taken all these variables into account when describing leadership in terms of the relationship between leaders and followers. Generally, these newer models treat leadership as a change process and the leader as a primary catalyst of change (Glynn and DeJordy, 2010, p. 125). The idea is that today's organizations, with flatter, hierarchical structures and technologically-savvy and knowledgeable workers, leadership is a joint venture between those in positions of authority and those doing the work (Riggio, 2011, p. 125).

Theoretical background emotional intelligence

Research on emotions has been conducted from various perspectives which can be categorized into the historic and evolutionary approach (e.g. Ulich and Mayring, 1992), action theory and cognitive approach (e.g. Schlegel, 2003), attributional approach (e.g. McElryo, 1982, p. 413) and the multiple perspectives approach (e.g. Oatley et al., 2006, p. 39). Due to the wide range of study fields related to emotions, it is no surprise that Kleinginna & Kleinginna found no less than 100 different definitions of emotions, which they tried to summarize in their own definition: "Emotion is a complex arrangement of interactions between subjective and objective factors which is transmitted by neuronal/hormonal systems which can cause affective experiences like feelings of arousal or lust/unlust, which can evoke

cognitive processes like emotionally relevant perception effects, evaluations or classifications ; which can start extended psychological adaptations to the conditions activating the arousal and which can lead to behaviour that is often expressive, goal - oriented and adaptive” (Hauer, 2003, p. 38). For the further discussion of emotions in this work, emotions are defined as conscious and unconscious neuronal reactions to the evaluation of experienced situations. These reactions do cause a physical change in the body of the actor which is not always observable and may lead to according actions. Beginning in the 1990s, the idea of emotional intelligence began attracting a good deal of attention, both among psychologists and in the popular press (Shiota and Kalat, 2012, p. 301). Earlier, emotional intelligence was not discussed because emotions were seen as “undesired influences on the logical-analytical behaviour and were left outside in order not to scratch the ideal of the rational acting manager” (Schlegel, 2003, p. 13). Gardner did not use the term of emotional intelligence but by proclaiming a new set of intelligences, including interpersonal and intrapersonal intelligences, he laid the foundation for the concept of emotional intelligence, which was mainly developed by Goleman. “An intelligence is the ability to solve problems, or to create products, that are valued within one more cultural settings” (Gardner, 1993, p. xiv). Salovey subsums the forms of personal intelligence proposed by Gardner under his basic definition for emotional intelligence which structures these abilities in five sections: Self-perception, to know ones own emotions; suitability, to handle emotions; goal-directed, to translate emotions into actions; empathy, to know what others feel; relationships, basis for popularity, leadership and interpersonal effectiveness (Salovey and Rothman 1991, pp. 280-282).

Specifications hospitality industry in Germany

Hotel services are related to goods, such as cleaning of hotel rooms, service of meals and related to persons, for example when providing information or during spa treatments. So hotel services combine goods and person related services (Henschel, 2001, p. 80). Hotel services do have certain characteristics which distinguish them from other industries. It is important to keep those specifications in mind when talking about leadership and motivation in hotels.

The main characteristics of services are that the ‘product’ is immaterial, that services are highly bound to a specific place, services cannot be provided in advance, they are not storable and they are characterized by the simultaneous contact of consumer and supplier while the consumer usually is part of the service in question (Beinlich, 2000, pp. 26-27). Additionally, services do have an increased risk at purchase and make a quantification difficult, services can hardly be standardized and are highly individual (Henselek, 1999, pp. 5-6). Furthermore, service is an experience for the guest and a performance for the server. It is intangible and the guest and the server are both part of the transaction. This personal element makes service quality control difficult (Barrows et al., 2012, p. 515). The hospitality industry in Germany includes hotels, guesthouses, bed and breakfasts, boarding houses and camp grounds. In 2011 there were 3,620,576.00 companies in Germany, of which 46,820.00 were of the hospitality industry (Statistisches Bundesamt Deutschland 2013). The hospitality industry made a total of € 23,793 Million revenue with 514,581 employees in total. That means that in terms of companies, revenue and employees the hospitality industry is approximately one percent of all industries in Germany. What is remarkable about the hospitality industry in Germany is its low income level combined with the long working hours. On average, an employee in the hospitality industry earned € 12.18 per hour in 2012 the average for Germany was € 21.30 (Statistisches Bundesamt Deutschland 2013). Those numbers do not include the unpaid overtime which is estimated at an average of six hours per week (Dehoga Bundesverband 2013).

Methodology

Based on the literature reviewed, two hypotheses are formulated:

H1: The motivation of employees is positively correlated to the effectiveness of leadership of their leader;

H2: Emotional Intelligence leverages the effect of leadership on motivation.

As became clear in the literature review part, transformational leadership is believed to be the most effective currently known leadership style. Therefore as well as for the sake of comparability in leadership research, it is decided to use the MLQ-5X which is based on this concept for the measurement of leadership. To measure emotional intelligence, the MSCEIT is chosen which is the most comprehensive measure of the ability model (Mayer, Salovey and Caruso, Emotional Intelligence Test). To measure motivation an own questionnaire is developed, using enjoyable, interesting, challenging and matching the employees competencies as intrinsic factors and prestige, development, salary and recognition as extrinsic factors. Those factors have been identified by a meta-study across various studies of motivation (e.g. Lesser, and Madabhushi, 2001; Stuhlfaut, 2010; Mundhra, 2010; Ke et al., 2012; Herpen et al., 2005). With those measurement methods selected, a tentative model is drawn which is shown below:

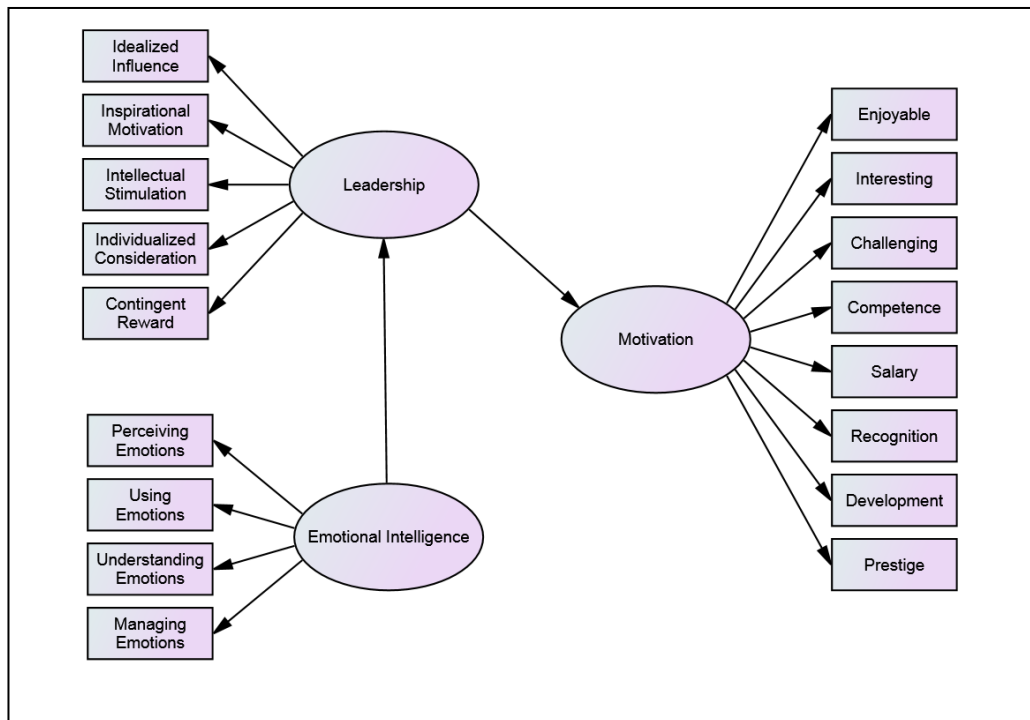


Figure 2. Tentative Model

Source: based on selected measurement methods and reviewed literature

Five experts were chosen from the industry side as well as from the academic side to get a well-rounded expert view on the assumptions on which the model is based. Regarding the influence leadership has on motivation, all experts agreed that leadership does have a significant impact on motivation. As traits and behaviors of the leader which would be helpful to increase employee motivation, most of the mentioned ones (e.g. honesty, integrity, supportive, passion, enthusiasm, creativity) could be fitted within the factors describing transformative leadership. The experts furthermore agreed that emotions do have an important

influence on the leadership process, mostly in areas regarding people, such as the motivation of employees. The experts remarked that only positive and well-controlled emotions will have a positive influence, otherwise the influence could be negative as well. Therefore the experts agreed that emotional intelligence has an important role in the leadership process. The experts also agreed that emotional intelligence could have a positive influence on the motivation of employees but remarked that motivation can hardly be generalized and that other factors of the leader personality are important for the motivation as well. Summarizing the model can be seen as substantiated by the experts and has therefore been tested quantitatively without prior amendments.

Results

The sample has been drawn through self-selection by posting the links in industry-related newsletters and on industry webpages. The MSCEIT should only be filled out by managers and has therefore been sent to 130 randomly selected hotels in Germany. The questionnaires on leadership and motivation were filled out by 76 employees of the hospitality industry in Germany, 40 of which were managers and 36 non-managers. 67% of the respondents were female which is a good representation of the gender distribution within the industry (Statistisches Bundesamt Deutschland). 51.3% of the respondents were younger than 30 years, 63.2% of the respondents are working in the hospitality industry for at least six years. The MSCEIT was completed by 67 managers of the hospitality industry in Germany of which 52.3% were male.

Before testing the model with structural equation modelling, a factor analysis with varimax rotation is executed to see if the factors used to describe the latent variables are well chosen. As per the factors chosen to measure motivation, the factor analysis shows that only three components do have an eigenvalue > 1 and those three components do explain 60.051 % of the variance of the variable motivation. After rotating the factors the correlation between each original factor and the three extracted components becomes clear. Component one is highly correlated to enjoyable, interesting, challenging, salary and development, component two consists of competence and prestige while component three shows a significant correlation to recognition. Due to the total number of eight factors at the beginning a factor analysis to reduce the number of factors is not necessary at this point. The results of the factor analysis suggest reducing the number of factors for measuring motivation to three components. Since especially component one incorporates many different factors, new names would have to be found for the new components. It is decided at this point of the analysis to leave all eight factors within the model and try to calculate it, while keeping in mind the possibility that the factors for measuring motivation will have to be reduced later.

When it comes to emotional intelligence, two of the four factors used to measure the variable have an eigenvalue of > 1 . Those two components explain 69.882% of the variance of the variable. When rotating the factors to decide of which factors each of the two extracted components consists, a very clear result is achieved. Component one consists of managing emotions and understanding emotions while component two correlates highly with perceiving emotions and using emotions. As with the factors and components for motivation, it is decided to leave all four factors to measure emotional intelligence in the model before calculating it. At the same time one has to bear in mind that it might be necessary to reduce the number of factors to two at a later stage.

In regards to the factors used to measure leadership, the factor analysis shows a different result. Only one component is extracted with an extremely high eigenvalue of 3.773, explaining 75.459% of the variance of the variable leadership. A rotation of factors is not possible, since only one component has been extracted. All five factors measuring leadership do have a high correlation to this one component. As done with the factors of motivation and emotional intelligence, all factors are left within the model. Concerning leadership it is to be expected that high correlations exist between the different factors in the measurement model.

As suggested from the factor analysis, the tentative model did not match the observed data in a satisfactory way. Therefore amendments have been made, reducing the number of factors in the measurement model and acknowledging covariances. This adjusted model has 65 sample moments and 38 parameters to be estimated, leaving a degree of freedom of 27. The c.r. values for the estimates between the latent variables still indicate an unsatisfactory statistical significance and the estimate for the regression weight between emotional intelligence and leadership is negative. The chi-square indicates a satisfactory model fit (25,086) with a p value of .570. The NFI (.907) and CFI (1.00) values also indicate a good fit between the model and the observed data as does the RMSEA with a value of .000 and a 90% confidence that the value is between .000 and .082. The ECVI value shows that the suggested model fits the data better than the saturated and the independent models do. The Hoelter values (120 / 141) indicate that the model is not an optimized fit. When taking into account the small sample this model can be seen as a satisfactory fit to the observed data, in order to achieve a higher goodness of fit a larger sample should be drawn before making further adjustments to the model.

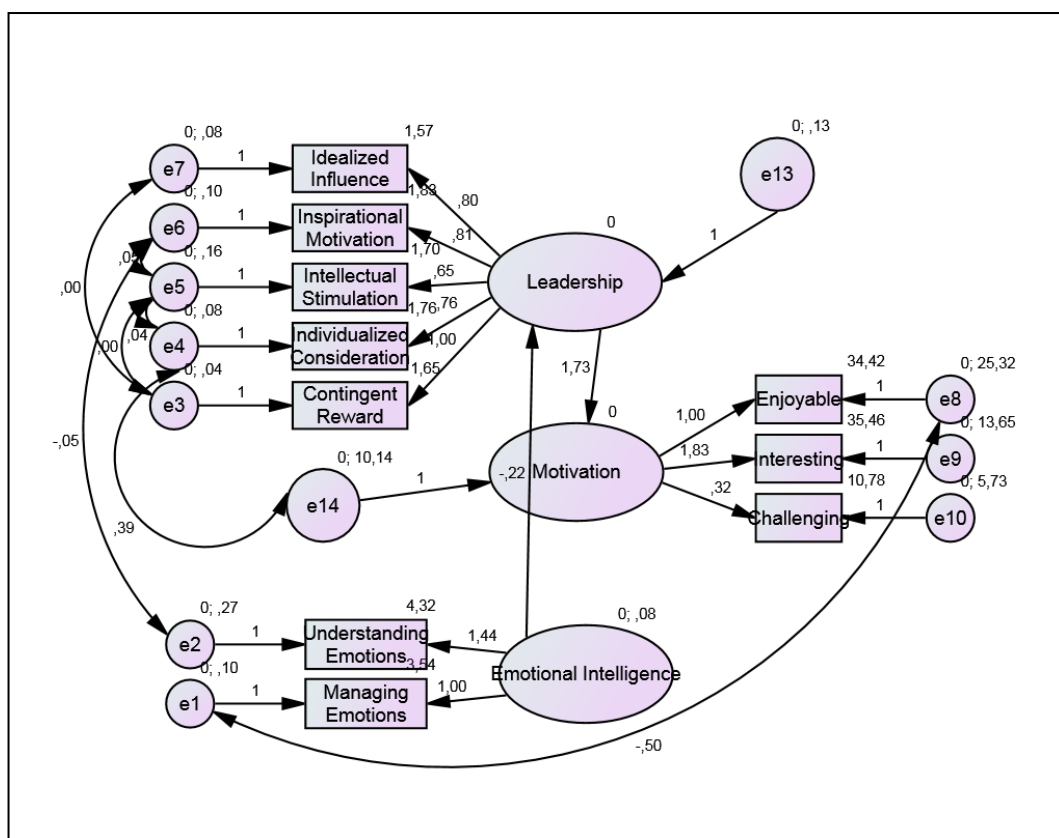


Figure 3. Adjusted and calculated model

Discussion

The results show that employees in the hospitality industry are mostly intrinsically motivated, which substantiates the importance of non-monetary motivation. The three remaining factors describing motivation also point in the direction of the young workforce Generation Y which has mostly answered the questionnaire and is known for their need to see the sense in what they are doing. H1 has been confirmed, since leadership is shown to be positively correlated to the motivation of employees. Motivation is also directly influenced by the factor individualized consideration, which seems to have the greatest importance for employees in the hospitality industry. H2 could not be substantiated, since the correlation between emotional intelligence and leadership in the drawn sample was weak and negative, which might be explained with the small sample size. The results clearly indicate that motivation of employees in the hospitality industry through leadership is a promising way which should be further explored through research and practice. Especially important for leaders in the hospitality industry is to individually consider each and every of their employees and show them the sense of their daily work.

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Professional aims-values of Russian political and career officialdom in terms of transformational stress

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Abstract

The present article is devoted to the impact of certain stressing factors on professional activity of Russian state civil servants.

Methodological and methodical bases of the present research include general and particular scientific methods: system analysis method, general management theory and synergetic methods. Theoretical base includes works of such scientists as Veber, Turchinov, Boykov, etc.

Introduction

Professional aims-values are particular values that officials of social systems (groups, staffs, corporations) set to themselves. To reach successfully these aims they have to subjectify them (to mark them by positive value support to split potential social energy).

Russian state civil service is a part of massive civilizational and cultural institutes that dictate behavioral stereotypes to all actors. Efficiency of state civil service depend on success of administrative reform that in its turn is impossible without reforms of federalism and reforms of local self-government.

Russia for more than 20 years has been living under posttraumatic stress caused by the process of goal-setting of its historical future in terms of next civilizational breakup. Russia still does not possess national idea that will be able to unite its nations. If common democratic values more and more actively become the style of life for young generation, then the question of way and form of appropriation remains open till change of elite at least. In any case obvious economic and other concerning inequalities will be examined thoroughly by the nation if there is an occasion. And this still latent threat defines numerous actions of state power in person of joint ruler of Russia. Similar to any considerable revolution-counter revolution the Russian society has already paid for the attempt to accept new economic and political ways of living by losing about 10% of its people, that can be compared to the conclusions made by Sorokin P. in description of classical wars, rebellions and revolutions.

Existential and worldview vacuum of target values (terminal – acc. to Rokech) of Russian society is added by weak social instrumental values (right, freedom, individual responsibility, tolerance...). These factors define mostly the features of relations between power and society, group of political and career officialdom, their inside self-identifications, social and corporative ethics and feelings.

New nomenclature Russian officialdom

In the beginning of 90th Russia suffered from full break of “political” and serious “crash” of “career” officialdom.

A new layer of political officialdom has appeared in Russia, still not homogeneous in its origin, experience in political service, attitude to property and state, ethnical identification, place of business and living.

Nowadays the category of “political” officialdom exists to some extent within the framework of patrimonial state rules of the game and is not included in the reform of state management. In present Russia political officialdom is not the elite one in common academic sense because it does not present statistically valuable subject of state policy.

Professional portrait of new Russian nomenclature can be seen on the example of heads of state power bodies of the Pskov Region. From 1985 till 1991 average length of service on the position of Vice-President of Pskov Province Executive Committee comprised 7,25 years. From 1991 till 2009 average length of service on the position of Vice-Governor of the Pskov Region comprised 2,3 years. Most part of them became Vice-Governors without any experience in administration, they were not informed about the state of the branches under their supervision. Percent of such appointees amounted up to 40% during certain periods of the 90th (Seliverstov, 2013). Many “staff” civil servants in the 90th replaced aims and values of the national entirety by private instinct of protection and accumulation of the acquired, the value of serving the state entirety has been lost.

Modern state civil Russian officialdom

Further analysis is made on the basis of data on national inquiries and sociological monitoring of state civil servants of the Pskov Region. From 1992 till 2011 the author has conducted six (www.gosakpskov.ru, 2011) sociological inquiries of state civil servants of the Pskov Region. The inquiry as of 2011 has revealed the following facts that may seem unusual at first glance: comparing to previous inquiries many tendencies have not changed more than by 0,1 that is negligible within the whole statistics. Neither defaults nor reforms and crises brought any significant impact on basic principles of functioning of native “staff” civil servants. Some deep civilizational and ethnocultural processes, sustainable basis of relations between state and civil servants could probably be the reasons for such results. Differences are obvious only after analyzing informational and technical and juridical accompaniment of administrative processes. Nevertheless there are no significant differences fixed in main questions. Thus, we may agree with Bartsits, native researcher of the abovementioned processes, who says: “Monitoring culture is as same sustainable as genes” (Bartsits, 2008).

According to the author the reform of state service resulted in the fact that Russian professional (staff) bureaucracy, unlike nomenclature one, started to move towards such characteristics of rational bureaucracy as serving the state, society, citizens and following the formal law.

Modern organizational order stipulated in main documents of the state service reform gradually becomes everyday practice of state civil servants’ activity that can be proved by their answers to the questions on introduction of certain rules and procedures of administrative process. Several questions prove positive dynamics after introduction of modern norms of state civil service into state power bodies’ activity. Many state servants agree that present regular personnel procedures are simple and easy to be understood and implemented in work. They discuss and accord with their heads new tasks for the next period of activity. They mark that moral and psychological climate became better and there appeared opportunities for professional self-realization and implementation of the new.

Mostly state civil servants feel joy from their work, from serving the state and seeing their work as serving the society.

Native state apparatus works not less efficiently and responsibly itself than its West and South-East friends.

Nevertheless there too many contradictions in the process of establishing institute of modern state service. Norms of basic laws have not become integrated with realities of political rules of Russian society's games. Under the conditions of weak system of party and policy the institute of state service has not become rational and efficient instrument for regulating interests of the state, society and citizens. Attitude of a state servant to his reform is multiple-meaning: he is not against it and eager to take part but he knows beforehand that it may lead to his firing during one of the next political cycles.

In the 90th-00th in a year after each change of political heads staff rotation in many state power bodies of the region reached 25-45%. Reconstruction of moral and psychological climate in staff and previous administrative efficiency started in 1-3 years but by that time a new political cycle had taken its start.

Civil servants: goals, values, conditions of professional fulfillment

One more step of sociological analysis is evolution of aims and values of staff officialdom in Russia for the last 20 years, attitude of young generation of state servants in Russia towards their liabilities, personal fate and professional career.

Motives and incentives leading state servants to vital self-realization and realization of their competence for work in state power bodies are reflected in answers to the following questions (Table 1).

Table 1. What does make you keep working at this position (place)? (No more than three answers)

	2005	2011	2005				2011			
			Up To 29	30- 39	40- 49	Over 50	Up To 29	30- 39	40- 49	Over 50
I keen on my job	47	50	42	41	37	54	55	51	45	50
I got used to this job	40	27	27	32	41	41	15	22	25	39
It is difficult to find another job in accordance with my specialization	22	16	18	24	26	16	31	10	18	10
I don't want to change my job for the same in commercial sector due to unstable situation with employment there	19	21	21	<u>30</u>	23	9	34	30	17	9
I don't want to change my job for the same in commercial sector because working there I will have to violate the law	14	6	18	16	17	9	8	8	5	5
It is worth working at state service at first and only than change this place for some other	6	5	<u>21</u>	19	2	2	15	7	1	0
I want to finalize my working period to retire	22	14	6	0	16	35	5	4	18	25

The underlined indices show that up one third (34%) of the young people under 29 years and 30% of persons of 30-39 years old would like to change for commercial sector under favorable conditions. Young people coming to state service connect their aims and values not with life-long service in its bodies but with dreams to build their own lives relying on themselves.

These conclusions are supported by the answers to the following questions (Table 2).

Table 2. What are the main aims of your work? (No more than two answers)

	2005	2011	2005				2011			
			Up to 29	30-39	40-49	Over 50	Up To 29	30-39	40-49	Over 50
I earn my living	65	64	51	68	71	64	55	62	66	73
I work to gain experience and improve qualification	22	33	<u>73</u>	51	17	2	<u>70</u>	56	23	4
I run messages	17	23	6	8	18	22	13	11	26	37
I work to satisfy the interests of citizens	14	11	<u>3</u>	0	15	20	<u>8</u>	10	14	14
I work to help my city and region to develop sustainably	17	14	<u>15</u>	11	17	19	<u>19</u>	14	15	13
I serve my state	28	19	<u>15</u>	22	27	34	<u>10</u>	11	21	29

Process of aim choosing by the personnel of state power bodies evolves very slowly. The value to serve the state is replaced (28% as of 2005, 19% as of 2011) by values to build personal and professional career.

The spirits that characterize today life of state servants let us suppose simultaneous existence of several processes (Table 3).

Table 3. What spirit is close to you today?

	2001	2005	2011	2005				2011			
				Up To 29	30-39	40-49	Over 50	Up To 29	30-39	40-49	Over 50
Confidence in future	4	6	17	19	0	4	6	23	17	15	11
Hope for stabilization of the situation	44	48	52	47	51	46	50	49	56	50	54
Doubts in the reforms held at present	8	15	9	6	19	14	18	7	7	12	11
Lack of confidence in close future	34	24	16	16	22	30	22	13	15	16	19
Indifference	1	1	1	6	3	0	1	1	2	2	1
Feel of despair	5	4	3	6	5	6	3	6	4	5	0

Note: Other: no answer, other answer.

Though the sum of 4, 5 and 6 positions shows that group of servants that used to live in constant frustration has been reduced from 40% to 20%, it is nevertheless statistically significant.

Up to half of the servants do not feel themselves a subject of reforms happening around them and to their social institute. The answers to the following question carry necessary information (Table 4).

Table 4. What do you think are the main privileges of state civil service (more than three paragraphs)

	2005	2011	2005				2011			
			Up To 29	30- 39	40- 49	Over 50	Up To 29	30- 39	40- 49	Over 50
Sustainable employment	42	<u>51</u>	39	32	44	43	47	50	43	59
Sustainable salary	58	65	39	70	62	57	66	57	67	68
Prestigious workplace, belonging to elite category of the society	10	10	18	22	7	5	21	11	6	6
Fringe benefits, social guarantees, privileges	14	16	15	14	15	15	23	19	16	11
Opportunity to realize own creative potential and initiative	23	19	18	11	25	26	<u>10</u>	18	22	25
Opportunity to communicate with highly qualified professionals	16	21	<u>9</u>	27	15	15	<u>24</u>	23	20	18
Opportunity to take part in the development of my city, district and region	12	15	<u>15</u>	5	11	15	<u>19</u>	14	14	15
Opportunity to be useful for population and society	26	25	<u>6</u>	14	25	35	<u>20</u>	21	33	27
Opportunity to serve the state	<u>17</u>	10	<u>18</u>	19	13	19	<u>5</u>	7	12	14
Opportunity to get useful business contacts	6	8	21	14	2	3	<u>19</u>	9	7	1
Opportunity to gain unique experience necessary for further career in private sector	2	6	12	8	0	0	<u>12</u>	12	1	0
I do not see any privileges	<u>21</u>	11	18	27	25	16	3	8	9	18

All state civil servants can be divided into at least two subgroups in accordance with motives and incentives that make them wish to work in state power bodies. The first group that

includes from half up to two thirds of servants appreciates sustainable employment, sustainable salary and package of benefits. It has grown up slightly that proves the fact that budget sphere becomes more valuable for Russian people. Many of them work at technical positions where rotation is rather slow. We have also to take into consideration that three fourths of state power bodies' workers are women.

The minor group that is from 6% up to 20-25% of servants are professionally and personally eager to build their own career by themselves using the experience gained at state civil service. Mostly such spirits are typical for young people under 29. Incentive to serve abstract state integrity has been practically vanished in this group (from 18% in the inquiry as of 2005 up to 5% as of 2011). However it was compensated by another social priority that is to serve the society, native territory and implement self-realization and building their fate. They prepare to conquer professionally and economically social weight in their region, become its leaders, and they feel that new rules of the game are conducive for this.

In general, we can make a conclusion that up to one fourths of state servants see their work as instrument to reach personal goals and are eager to use it as springboard before next more payable career or business one.

Such classifications given by the author can be supported by dynamics and results of all Russia monitoring over state servants held by other researchers. Thus during the researches as of 2000, 2001, 2003, and 2006 years 5 preferences were found out to be prevailing ones among incentives to go to the state service (Table 5) (Magomedov, 2010).

Table 5. Incentives to go to the state service (in % from answers, mark more than one answer)

	2000	2001	2003	2006
Guarantee of constant work and sustainable position	41	42	47	56
Wish to realize own professional skills more fully	40	36	42	29
Wish to be useful to the society and state	30	31	38	31
Wish to improve career growth	20	17	16	25
Wish to improve material welfare	15	12	19	15

Servants can be also divided into two groups according to the answers to the question about desire to change the working place (Table 6).

Table 6. Would you like to change your working place? (www.gosakpskov.ru)

	Administration of the Pskov Region					
	1992 (71 persons)	1994 (93 persons)	1997 (90 persons)	2001 (110 persons)	2005 (65 persons)	2011 (102 persons)
No, I would not	45	66	70	65	75	71
I would like to but there is no opportunity at present	13	12	17	25	14	12
I have not decided yet	30	16	8			
I would not like to but probably I would have to (addition as of 2005)					8	11
I have decided to change my work	4	-	1	3	3	5
I cannot say	9	5	3	7	-	-

The answers show that from qualification plurality up to three fourths of state servants appreciate their job and would not like to change it according to their own will. Moreover

starting from the first inquiry as of 1992 this tendency has acquired positive growth by 30%. This means that despite all difficulties concerning structural reforms and optimizations of administrative structures the institute of state service is sustainable enough in its deepest incentives.

In general, from 1992 the part of servants that cannot integrate with their work remains the same (about 30%). Dispersion in this classification is connected in particular with phase of new political cycle in state power body especially with the shock of 1992. The biggest percent of rotation belongs to the first year of change of political leader of the state power. The second important factor is the situation in real economic brunch itself. If it is at a depressive stage, the servant tries to save his working position; if the situation develops young people try to find more payable jobs. These primary cultural and civilizational terms, fundamental social and economic constants play the main role in functioning of state apparatuses.

It is possible that this constant presents the result of essential principle of intraspecific relationships among people inside responsible, highly qualified, half closed and sometimes rough corporative environment where males everyday fight for their role and place at bread-winning territory and females are always compete with each other. At the same time the majority of the servants have friendly and regardful relation with their colleagues. Some servants are a bit more persistent in improving their professional and social positions. This range of values and spirits is widely described by Stepnova and Stepnov in their research of value and sense conflicts of state servants. Modern servants mostly appreciate such values as “skills”, “fidelity to duty” and “personal self-improvement”. “Power”, “creation” and “prestige” are less valuable (Stepnova & Stepnov, 2011).

In accordance with discomfort-stress scale 30% of state power bodies’ servants feel professional and personal discomfort or stress. From 4% to 20% of servants feel different extent of stress, about 2% of servants feel the highest extent of stress. Most part of servants does nothing to get rid of their discomfort or stressful state, the least part tries to make some attempts to fight such situation.

Conclusion

Discrepancy analysis of aims and values of professional activity of career state civil servants in Russia as a result of stressful conditions of its modern state is not in the problem how to improve the efficiency of state structures’ work. The solution can be found in its relationships with category of “political” officialdom.

Some corporative aims, that they have to reach, do not become their personal values. It is first of all connected with the fact that major part of Russian society in not ready to adopt some specific system of civilizational values.

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Chapter 5: Diversity: Gender, Age, and Religion

Gender equity in the companies from Sinaloa, México

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Project background

When discussing gender equity in a generic way, it refers to the practice of justice when treating men and women, taking into account their respective needs. It implies equal or different treatments in order to have a perfect match in terms of rights, benefits, obligations and opportunities (www.socialwatch.org).

In order to understand the gender inequities and to monitor their status and world situation, Social Watch has developed the Gender Equity Index (GEI), which is based on the available and comparable information from and within the countries; it allows us to rank and classify the nations according to indicators in three dimensions: Education, Economic Activity and Empowerment.

Gender equity is a topic that also focuses on the labor context, thus the International Labor Organization (ILO) headquartered in Geneva, refers to gender equity as justice in the way men and women are treated in the workplace, taking into account the specific needs of both. Such needs that arise from the nature of males and females require an equal or different treatment based on the equivalence of rights and obligations, as well as benefits and opportunities. However, in many countries inequalities are evident in the non-recognition of this equivalence. (www.ilo.org/public/spanish/gender.htm)

Authors like Abramo et al (2000, cited by Iranzo and Richter, 2002 p.156) state that female segregation in employment occurs when a woman who is better trained academically than a man is not a guaranteed that the job position would be given to her, just for being a woman.

Meanwhile, Valenzuela (2004, Pp. 9-10) defines decent work as a productive activity that is appropriately compensated and that is performed in conditions of freedom, equity and security, as well as one that is able to ensure a decent life for the working people and their families.

According to ILO statements, a fair payment is perhaps the most addressed dimension by the literature. To act equitably, equal work should be paid with an equal salary, regardless the sex of the worker. Although the tendency is that the gap is being reduced, various countries still pay more to men than to women.

Additionally Heikel (2004) address that gender differences are clear when analyzing the salaries of men and women. Women receive as remuneration an average equivalent to the

50% of the minimum wage, while men receive an average equivalent to 70% of the minimum wage. The women house workers' salary is on average 70% of the compensation gained by men that work in domestic paid duties.

From different points of view, the phenomenon of gender inequity in employment is noticeable in various Latin American countries.

In Mexico, there even have been cases of violence in the workplace. According to the National Survey on the Dynamics of Household Relationships (ENDIREH, acronym in Spanish), reported by INEGI (2006), in the period October 2005 to October 2006, 69.5% of the workers said they have not been subject of violence at work, while 29.9% said they suffered violence at work from their employers, bosses or co-workers, and 0.6% did not specify. From the same survey, it was found that currently married women suffered more violence than singles or those ever married.

Another particularly important phenomenon that occurs in the workplace and that put working women at greater vulnerability is sexual harassment in employment. In response, Iranzo and Richter (2002) believe that sexual harassment is manifested by: a) physical or psychological pressure on women or men b) demand sexual favors as an exchange to keep a job and c) prejudice to confront the problems of sexual harassment. The researcher Frias (2011) argues that Mexican women workers have been subject of direct or indirect sexually harassment.

As shown in previous paragraphs, gender equity in employment is a topic of interest for various international and national institutions but in the empirical side there are many doubts about the ongoing efforts that business are carrying out in order to provide of fair opportunities, for both men and women.

Hypothesis

The following hypotheses were the research guidelines:

- H1: The degree to which companies practice gender equality in employment is high.
- H2: Respect for labor rights and access to training are the dimensions of gender equality that are more practiced in the companies where the surveyed women work.
- H3: The compensation systems and promotion criteria are the dimensions of gender equality in employment that are less practiced in the companies where the surveyed women work.
- H4: There is sexual harassment in employment.
- H5: There are differences in gender equity practices among companies in the cities of Culiacan and Mazatlan.

Methodology

This research is descriptive with academic purposes. Both, the quantitative and qualitative methods were used, considering the importance that they have in the field of social and administrative sciences.

The authors designed and wrote a questionnaire with 14 items related to the requirements for gender equity in employment set by the National Institute of Social Development (INDESOL, Mexico).

The possible answers were written to the right of the items in the Likert-type scale, with 11 ordered response options, where 1 = Strongly agree, 0.5 = neither agree nor disagree, and 0 = Strongly Disagree. The means of the ordered responses were calculated.

Referring to fieldwork, this was done by surveying a sample of 250 women workers in the city of Culiacan and another sample of 250 workers in the city of Mazatlan, both municipalities of the State of Sinaloa, Mexico. The survey was administered at the workers job place and they were able to answer comfortably without rushing, facing the interviewer.

Results

In order to observe some characteristics of the workers being researched, the sample profile is addressed as follows.

Sample Profile

In both cities, more than 70% of the women workers were between 18 and 35 years old. In Culiacan, most of the workers said to be singles (50.4%) and in Mazatlan the majority are married (60.8%). To test the hypothesis stated in this research, the results related to them are shown below: Hypothesis 1 says: The degree to which companies practice gender equality in employment is high.

The answers of the items had a numerical representation of 11 ordered response levels, between 0 and 1, where: 0 = totally disagree, 0.1 = strongly disagree, 0.2 = disagree, 0.3 = slightly disagree, 0.4 = very little in disagreement, 0.5 = neither agree nor disagree, 0.6 = very somewhat agree, 0.7 = somewhat agree, 0.8 = agree, 0.9 = strongly agree, 1 = totally agree.

Considering the results shown in Table 1 below, women workers from Culiacan are more than agree that the companies where they work implement gender equity practices with their employees in 9 requirements proposed by INDESOL, Mexico. Only in the requirements numbers one, two, ten and twelve a small reduction can be observed, which means that those surveyed answered “somewhat agree”.

Table 1. Means of the responses of women workers from Culiacan.

CULIACAN			
#ITEM	N	Mean	Standard Deviation
Three	250	.9097	.17903
Four	250	.8745	.22278
Five	250	.8671	.21785
Eleven	250	.8606	.21042
Six	250	.8506	.23888
Thirteen	250	.8429	.23028
Nine	250	.8214	.24276
Eight	250	.8202	.25310
Seven	250	.8085	.26521
One	250	.7976	.29154
Ten	250	.7972	.26669
Twelve	250	.7204	.32629
Two	250	.5912	.35545
Fourteen	250	.4248	.40013
Valid N (according to List)	250		

Table 2 shows the results obtained in the city of Mazatlan where it is observed that in twelve of the fourteen requirements (items) the surveyed workers agree that the companies where they work implement gender equity practices; the only requirement with the lowest rank was the number 2 with a score of 0.8.

Table 2. Means of the responses of women workers from Mazatlan.

MAZATLAN			
#ITEM	N	Mean	Standard Deviation
Thirteen	250	.9376	.13028
Three	250	.9293	.14887
Four	250	.8980	.20861
Eight	250	.8976	.19796
Five	250	.8827	.22411
Nine	250	.8820	.21648
One	250	.8736	.22607
Six	250	.8700	.23220
Eleven	250	.8540	.27453
Ten	250	.8478	.25935
Seven	250	.8364	.27214
Twelve	250	.8316	.28976
Two	250	.6280	.38685
Fourteen	250	.1956	.30303
Valid N (according to List)	250		

Therefore, according with the results shown above, it is stated that the hypothesis 1 is validated.

H2: Respect for labor rights and access to training are the dimensions of gender equality that are more practiced in the companies where the surveyed women work.

Tables 1 and 2, show the weighting of the different requirements for gender equity in the enterprises of both cities. In both tables, it can be observed that in both cities the items 3 and 4 are the requirements with the highest mean.

The Item 3 says: “In the company where I work, women have the same days off, vacations, Christmas bonus and vacation premium that men do.” (RESPECT FOR LABOR RIGHTS). Whilst the item 4 says: “The company where I work, equally train women and men” (ACCESS TO TRAINING)

Therefore, based on the information stated above, the hypothesis 2 is validated.

H3: The compensation systems and promotion criteria are the dimensions of gender equality in employment that are less practiced in the companies where the surveyed women work.

Tables 1 and 2, show the weighting of the different requirements for gender equity in the enterprises of both cities. In both tables, it can be observed that in both cities the items 7 and 10 are the requirements with the smallest mean.

The item 7 says: “In the company where I work, promotions are equally given to men and women” (PROMOTION CRITERIA). Whilst the item 10 says: “In the company where I work

women and men earn a very similar salary, in a way that in the same job positions our salaries are the same” (COMPENSATIONS SYSTEM).

Therefore, based on the information stated above, the hypothesis 3 is validated.

H4: There is sexual harassment in employment.

In Table 3 it can be observed that requirement number 14 is related to sexual harassment and according with the obtained means, this phenomenon mainly occurs in the city of Culiacan (0.4248) compared with the city of Mazatlan (0.1956).

Table 3. Comparison of both cities, through the means of the items related to gender equity in employment, in order of appearance.

#ITEM	CULIACAN (n=250)	MAZATLAN (n=250)
	Mean	Mean
1. Recruitment and selection procedure	.7976	.8736
2. Description and job profile	.5912	.6280
3. Labor Rights	.9097	.9293
4. Access to training	.8745	.8980
5. Design and schedule of the training courses	.8671	.8827
6. Professional Development	.8506	.8700
7. Promotion Criteria	.8085	.8364
8. Performance Evaluation	.8202	.8976
9. Labor Opportunities	.8214	.8820
10. Compensations Systems	.7972	.8478
11. Deductions System	.8606	.8540
12. Sensitivity in the allocation of tasks	.7204	.8316
13. Respect within the work space	.8429	.9376
14. Sexual harassment	.4248	.1956

Additionally, since the means of requirement 14, the standard deviation was very high, it was necessary to observe the frequency of each one of the answers in order to have a greater accuracy when explaining them. From the results, it was observed that 50.8% of the surveyed workers expressed strong disagreement about facing problems of sexual harassment in their workplaces, but it was also observed that 20.6% of the workers expressed strong agreement about having sexual harassment problems within the companies where they work.

Therefore, based on the information from the Table 4, the hypothesis 4 is validated.

H5: There are differences in gender equity practices among companies in the cities of Culiacan and Mazatlan.

Table 3 shows that in 12 of the 14 requirements, the women workers from Mazatlan scored higher than the workers from Culiacan. While in the item of sexual harassment, the workers from Culiacan scored higher than the workers from Mazatlan. It means that both entities differentiate their gender equity practices in employment, and Mazatlan is performing better in this matter. Therefore, based on the results stated above, the hypothesis 5 is validated.

Conclusions

The results of this research make evident that, in general, in the cities of Culiacan and Mazatlan Sinaloa in Mexico, companies perform good practices in gender equality. This

means that men and women receive similar opportunities to be hired, stay and grow in the companies where they work.

Also, from the results of the research it was observed that a small group of employers and bosses harassed sexually their women employees. The lack of ethic of some employers, either in high or middle positions, let them to use their power and abuse of the women workers' needs, to satisfy their instincts.

The empirical research conducted by surveying 500 women workers allowed having a reference about gender equality in employment in Sinaloa, an important state in Mexico Northwestern.

Limitations and future research

An important limitation may be the sample considered for this research, since it only took into account women workers from two of the most important cities of Sinaloa. The characteristics of the sample may have an impact on the results because it is expected that in other states of Mexico gender equality in employment is not as positive. Sinaloa is a state where women have greater opportunities to access education and work, and that might be different in other regions of Mexico.

Therefore, it would be interesting to conduct a research in other cities from other states to analyze whether the results are different.

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Work antecedents and work-family conflict amongst Hindu working women in South Africa: The moderating effect of gender role ideology

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Abstract

This study examined the relationship between two work demands (work involvement and work overload) with both directions of work-family conflict (work-to-family conflict and family-to-work conflict) amongst Hindu working women in South Africa ($N = 317$). Moreover it investigated the moderating effect of gender role ideology on these relationships. Given the salience of family in Hindu culture, South Africa Hindu women who occupy a work and a family role may experience pressures in managing the work-family interface. This study aims to contribute to the limited literature in this area by considering the effect of cultural beliefs on work-family conflict relationships for members of an ethnic group.

Introduction

The post-democracy period in South Africa has witnessed a marked increase in Hindu women entering the workforce, attaining financial independence and enhanced status within their families and society. However as Hindu women progress educationally and economically, they may find themselves negotiating competing expectations between their work and family roles. Many of these women endeavour to preserve cultural traditions and strong family bonds while pursuing a career. The inter-role conflict experienced by ethnic women with traditional cultural values between their work and family roles is lacking in the extant work-family literature. This paper considers Hindu women in South Africa as exemplars of this phenomenon and examines whether gender role ideologies influence their experiences between their work demands and their work-family conflict (WFC).

Greenhaus and Beutell (1985, p.77) defined work-family conflict as “A form of inter-role conflict in which the role pressures from the work and family domains are mutually incompatible in some respect”. WFC is fundamentally rooted in role stress theory (Kahn Wolfe, Quinn, Snoek, & Rosenthal, 1964) and resource drain theory (Edwards & Rothbard, 2000). Kahn et al. (1964) stated that conflict within a role (intra-role) and conflict from multiple roles (inter-role) can result in undesirable states because of the opposing expectations demanded from each role. The individual experiences resource drains because resources such as time, concentration, and energy are depleted. Hence pressure associated with one role conflicts with the other role as a result of competing finite resources.

Advancements in research have consistently evidenced the bi-direction nature of work-family conflict, showing that work-to-family conflict (W2FC) and family-to-work conflict (F2WC) are related but distinct constructs (Byron, 2005; Michel, Kotrba, Mitchelson, Clark, & Baltes, 2011). Early findings by Frone, Russel and Cooper (1992) reported that W2FC was related to work antecedents while F2WC was related to family antecedents. Recent extensions on these findings have also shown cross-domain effects (that is, relationships between work antecedents and F2WC and family antecedents and W2FC) (Michel et al., 2011). This paper examines the relationship between two work demands (work overload and work involvement) and both directions of work-family conflict because work demands may be perceived as

hindering Hindu working women's ability to adequately fulfil their family duties causing conflict.

Work demands as antecedents of work-family conflict

Emotional and physical work responsibilities play a role in the occurrence of work-family conflict (Lu, Kao, Chang, Wu, & Cooper, 2008). Two work demands of interest in this study are work involvement and work overload. Work involvement refers to the extent to which an individual's work is central to his/her self-esteem or sense of identity (Aryee, Fields & Luk (1999). Cognitive involvement in the work role may occupy time and energy resources, hence meeting family responsibilities become challenging for Hindu working women, increasing the likelihood of WFC. Work role overload is the extent to which individuals perceive their time and resources to be insufficient to fulfil the expectations associated with their work role (Matthews, Kath and Barnes-Farrell, 2010). Hence for Hindu working women in South Africa, high overload from the work domain is likely to impede their ability to perform all their family duties leading to tension between the two competing roles causing WFC. Empirical evidence for the relationships between work involvement and work overload with WFC has been found in both Anglo-based societies revealed in meta-analytic work (e.g., Ford et al., 2007) and other cultural contexts such as Nigeria (e.g., Adekola, 2010) and China (e.g., Li, Lin, & Korabik, 2010).

Gender role ideology

Gender role ideology (GRI) refers to culturally defined behavioural norms associated with males and females in a given culture. Traditional gender role ideologies promote the sentiment that work and family are distinct domains whereby women prioritise caregiving duties in the family domain and men prioritise income producing activities in the work domain. On the other hand, egalitarian views share beliefs of equal role sharing for men and women (Davis, 2011). The socialisation of Hindu working women in South Africa is still predominantly along traditional gender lines despite access to educational and labour systems that promote the notion of gender egalitarianism. This may be because in Hinduism the role of the woman is clearly delineated. *Stri dharma* refers to the dharma (duty) of women which according to the Laws of Manu (an ancient Hindu code) articulates the principal role of woman in the household. Through marriage, the Hindu woman has a duty to fulfil as a good wife and good daughter-in-law. These roles include serving her husband and in-laws and bearing children, while the husband in return is expected to provide for his wife's material needs and her security (Chandra, 2010).

Given the above, this study proposes that work demands (work involvement and work overload) predict both directions of WFC amongst Hindu working women in South Africa.

Hypothesis 1a: Work involvement predicts W2FC

Hypothesis 1b: Work overload predicts W2FC

Hypothesis 2a: Work involvement predicts F2WC

Hypothesis 2b: Work overload predicts F2WC

Noting that South Africa is a multicultural country with varied ethnic cultural groups, it is increasingly important to acknowledge the influence of cultural variables in shaping ethnic members' behaviours and work-family decisions. Few studies have investigated the moderating effect of cultural variables on the relationship between work-family demands and work-family conflict, particularly in mono cultural work-family studies. Due to a lack of local

contextual literature, international empirical evidence has shown that individuals' views regarding the gendered division of labour with regard to work and family roles are related to work-family conflict. Ayman (2008) found that employees holding traditional gender role views in transitioning economies experience greater work-family conflict than those with egalitarian gender role perceptions living in developed economies. Whereas Mortazavi, Pedhiwala, Shafiro, and Hammer (2009) suggested that WFC experiences may differ depending on the individual's cultural expectations of the appropriate role behaviour for men and for women. They found that Ukrainian women did not experience greater work-family conflict than men despite holding traditional gender role expectations in a transitioning economy. This could have resulted from them being socialised to accept their need to manage both work and family demands. Inconsistencies in these findings warrant further exploration of the effect of gender role ideology on work-family relationships in particular cultural contexts.

From the above, it is proposed that gender role ideology has a moderating effect on the relationship between work demands (work involvement and work overload) and WFC for Hindu working women in South Africa, such that those holding a traditional view are likely to experience increased W2FC conflict caused from their work demands. Whereas those with an egalitarian gender role ideology may experience greater role sharing at home and accordingly feel that their work demands conflict less with their family responsibilities.

Hypothesis 3a: Gender role ideology moderates the relationship between work involvement and W2FC

Hypothesis 3b: Gender role ideology moderates the relationship between work overload and W2FC

Similarly, Hindu working women in South African who have been socialised in a more traditional than egalitarian manner, may feel that their high levels of family duties creates greater conflict in their work domain when their work demands are high.

Hypothesis 4a: Gender role ideology moderates the relationship between work involvement and F2WC

Hypothesis 4b: Gender role ideology moderates the relationship between work overload and F2WC

Method

Design, sampling and procedure

This study was based on a descriptive design with a cross-sectional time dimension. Data was collected via self-report surveys. South African women were eligible to participate if they self-identified as Hindu and were simultaneously involved in a paid work role and family role. The family role was restricted to either women who had children or were looking after an elderly family member in her home, or both. A non-probability convenience sampling approach was used to gather data $N = 317$. The ages of the women ranged from 22 to 68 years ($M = 41.09$; $SD = 9.02$). The majority were married (79.6%) and 83.3% had children, with 36.5% of the women having at least one child under the age of 6 years. Almost half (46.9%) lived with and cared for an elderly parent, parent-in-law or relative which is characteristic of traditional Hindu families. Most of the women had at least an undergraduate degree or diploma (37.4%) and 29.9% held postgraduate degrees. The women were almost equally distributed amongst the job status categories: non-management (34.8%), management (28.3%), and professional (29.9%). Job tenure ranged from two months to 44 years ($M = 10.36$; $SD = 8.28$). Ethics approval was obtained for the study prior to data collection.

Participants were approached via their local Hindu society following permission from each society's chairperson, who requested participation on behalf of the first author.

Measures

Measures were selected based on the strength of their psychometric properties in previous studies. All measures showed high levels of internal consistency and validity in prior studies. Responses to all the items were rated on a 5-point Likert scale ranging from 1 (strongly disagree) to 5 (strongly agree).

Work involvement was measured with a 5-item scale adapted from Aryee et al., (1999). Higher scores indicated high involvement in one's work role. A sample item was "When I am working, I forget everything else around me".

Work overload was measured with a 5-item scale by Matthews et al. (2010). Higher responses inferred high work overload. A sample item was "I have to do things at work that I do not really have the time and energy for".

Work-family conflict was measured using the 10-item scale developed by Netemeyer, Boles and McMurrian's (1996). Five items measured work-to-family conflict and five items measured family-to-work conflict. The original 7-point response Likert scale was reduced to a 5-point response scale to align with the format of the full questionnaire. A high score on each subscale suggested high levels of work-to-family and family-to-work conflict respectively. A sample item for the W2FC item was, "My job produces strain that makes it difficult to fulfil family duties", and for the F2WC items, "I have to put off things at work because of demands on my time at home".

Gender role ideology was measured with a scale by Minnotte, Minnotte, Pedersen, Mannon, and Kiger (2010). Two items were reversed. Lower scores indicated an egalitarian orientation, while higher scores suggested a traditional gender role orientation. A sample item was, "A woman's most important task in life should be taking care of her children".

Some demographic characteristics were included as *control variables*. Age and tenure was measured continuously in years. Work type (non-managerial, managerial, professional, and business owner) was included as a set of dummy variables.

Results

Psychometric properties of the scales

The scales demonstrated adequate to high levels of internal consistency, with Cronbach alpha values ranging from .764 to .958 (Hair, Black, Babin, Anderson, & Tatham, 2010). Only the gender role ideology scale was initially below the acceptable threshold ($\alpha = .503$). Upon the deletion of the two reversed score items, the alpha coefficient increased to .764 (Reliability coefficients are presented along the diagonal in Table 1). Item appropriateness and discrimination was assessed for the subscales. All corrected item-total correlations met the acceptable conventional cut off of .30 for a sample size between 300 and 350 (Hair et al., 2010). Item-total correlations for the full scale ranged from .440 to .900 indicating very good discrimination.

Principal axis exploratory factor analysis with varimax rotation and eigenvalues greater than one were used to determine distinct factors. For the work demands, two factors emerged accounting for 41.67% and 23.90% of the total variance respectively. Work overload items loaded onto Factor 1 (all factor loadings greater than .658) and work involvement items loaded highly on Factor 2 (all factor loadings greater than .539). For the WFC scale, the solution presented two factors accounting for 68.45% and 14.05% of the total variance

respectively: work-to-family conflict and family-to-work conflict. Although there are cross-loadings of all the items, the W2FC items loaded strongly on one primary factor, Factor 1 (all factor loadings greater than .747) and all F2WC items loaded strongly on Factor 2 (all factor loadings greater than .777). The four gender role ideology items loaded onto one factor (all factor loadings greater than .503) explaining 58.62% of the variance, indicating a uni-dimensional measure. Table 1 shows the descriptive statistics and the bivariate correlation matrix of the variables.

Table 1. Mean, standard deviation and correlation analysis

Variable	M	SD	1	2	3	4	5
1. Work Involvement	2.942	.895	(.852)				
2. Work overload	2.807	.904	.260**	(.871)			
3. Gender role ideology	2.661	.928	.075	.077	(.764)		
4. W2FC	2.686	1.041	.284**	.611**	.234**	(.946)	
5. F2WC	2.282	.938	.203**	.417**	.289**	.657**	(.946)

Note. $N = 316$ after casewise deletion of missing data ** Correlation is significant at the 0.01 level (2-tailed). Cronbach's alpha reflected on the diagonal. M = mean; SD = standard deviation; W2FC = work-to-family conflict; F2WC = family-to-work conflict.

Testing of hypotheses

Table 2 (next page) summarises the results of the hierarchical multiple regression analysis for W2FC. The control variables *age*, *tenure* and *work type* were entered in Step 1. Together they explained 4.5% variance in W2FC ($p = .019$). In step 2, the work demands: *Work involvement* and *Work overload* were entered and explained an additional 35.7% variance in W2FC ($\Delta R^2 = .357$; $p < 0.0001$). *Gender role ideology (GRI)* was entered in Step 3, explaining an additional 4.8% of variance in W2FC ($p < 0.0001$). After entering the interaction terms *Work involvement* $\times$ *GRI* and *Work overload* $\times$ *GRI*, the total variance explained by the model as a whole was 44.7%, $F(2, 288) = 4.203$, $p = .016$. In the final model, the control variable *Work type* was significant, showing that managers ($\beta = .267$, $p = .026$) and professionals ($\beta = .441$; $p < .0001$) experienced greater W2FC than the reference category non-managers. *Work involvement* ($\beta = .605$; $p < .0001$) and *Work overload* ($\beta = .162$; $p = .002$) were statistically significant predictors of W2FC, thus confirming hypothesis 1a and 1b respectively. Though not hypothesised, *GRI* explained a significant proportion of the variance in W2FC ($\beta = .162$; $p = .002$). For hypothesis 3a, the interaction term *Work involvement* $\times$ *GRI* explained significant variance in W2FC ($\beta = -.142$; $p = .005$), although the negative relationship was contrary to the direction hypothesised. This result infers that the relationship between work involvement and W2FC is weaker for Hindu working women in South Africa who hold a more traditional gender role ideology. The interaction term *Work overload* $\times$ *GRI* was not statistically significant. Therefore hypothesis 3b was not supported.

Table 3 (next page) summarises the results of the hierarchical multiple regression analysis for F2WC. The control variables *age*, *tenure* and *work type* were entered in Step 1. Taken together the control variables did not explain significant variance in F2WC ($p = .056$). In step 2, the work demands: *Work involvement* and *Work overload* were entered and the total model explained 19.4% variance in F2WC ($\Delta R^2 = .176$; $p < 0.0001$). *Gender role ideology (GRI)* was entered in Step 3, explaining an additional 6.7% of variance in F2WC ($p < 0.0001$). After entering the interaction terms *Work involvement* $\times$ *GRI* and *Work overload* $\times$ *GRI*, the total variance explained by the model as a whole was 29.5%, $F(2, 288) = 3.247$, $p = .040$. In the final model, the control variable *Work type* was significant, indicating that professionals ($\beta = .353$; $p < .0001$) experienced greater W2FC than the reference category non-managers.

Table 2. Hierarchical regression analysis: DV = Work-to-family conflict (W2FC)

Variable and statistic	Standardised betas			
	Step 1	Step 2	Step 3	Step 4
Age	-.015	-.003	-.005	-.005
Tenure	.006	-.007	-.008	-.008
Work Type (0 = non-managerial)				
Managerial	.274	.158	.310*	.267*
Professional	.456*	.323*	.465**	.441**
Business owner	.286	.238	.374	.318
Work involvement		.160*	.140*	.162*
Work overload		.641**	.618**	.605**
GRI			.263**	.281**
Work involvement x GRI				-.142*
Work overload x GRI				.049
F	2.746	.728	25.426	4.203
Df	5, 293	2, 291	1, 290	2, 288
Multiple R ²	.045*	.402**	.450**	.465*
Adjusted R ²	.028	.387	.435	.447
Change in R ²		.357	.048	.016

Note. $N = 316$ with casewise deletion of missing data; * = $p < .05$; ** = $p < .0001$

GRI = Gender role ideology

Table 3. Hierarchical regression analysis: DV = Family-to-work conflict (F2WC)

Variable and statistic	Standardised betas			
	Step 1	Step 2	Step 3	Step 4
Age	-.001	.007	.005	.006
Tenure	.007	-.001	-.002	-.003
Work Type (0 = non-managerial)				
Managerial	-.083	-.158	.004	-.031
Professional	.316*	.232*	.384*	.353*
Business owner	.274	.247	.393	.343
Work involvement		.087	.066	.084
Work overload		.416**	.392**	.381**
GRI			.281**	.298**
Work involvement x GRI				-.079
Work overload x GRI				.119*
F	2.185	32.607	26.939	3.247
Df	5, 293	2, 291	1, 290	2, 288
Multiple R ²	.036	.212**	.279**	.295*
Adjusted R ²	.020	.194	.260	.271
Change in R ²		.176	.067	.016

Note. $N = 316$ with casewise deletion of missing data; * = $p < .05$; ** = $p < .0001$

GRI = Gender role ideology

Regarding the work demands, *Work involvement* was not statistically significant ($p = .130$) however *Work overload* was a significant predictor of F2WC ($\beta = .381$; $p < .0001$). Therefore hypothesis 2b but not 2a was supported. Though not hypothesised, *GRI* explained a significant proportion of the variance in F2WC ($\beta = .298$; $p < .0001$). The interaction term *Work involvement x GRI* was not statistically significant ($p = .129$), however the interaction term *Work overload x GRI* explained significant variance in F2WC ($\beta = .119$; $p = .029$) suggesting that the relationship between work overload and F2WC is stronger for Hindu working women in South Africa who hold more traditional orientations. Thus hypothesis 4a

was not supported but hypothesis 4b was supported. Further details about these results are available from the authors.

Discussion

Work-family researchers have predominantly reflected Anglo values of white middle class samples in the US, and to some extent have disregarded the experiences of a large proportion of the workforce for whom such values are not salient. The contribution of this paper is explicating the influence of cultural beliefs on the work-family interface because demands that serve as antecedents of WFC are shaped by values, beliefs, and role conceptions that transpire through socialisation (Galovan, Fackrell, Buswell, Jones, Hill, & Carroll, 2010). Many Hindu women, from early socialisation, are exposed to society's expectation of the appropriate role for the Hindu mother, wife and daughter-in-law.

Multiple regression analysis showed that work involvement and work overload contributed to explaining W2FC amongst Hindu working women in South Africa. This is most likely because when these spend time and energy in their work roles, they are likely to experience exhaustion, which negatively influences their motivation to respond to the demands of their family. The results also evidenced a significant cross-domain relationship whereby work overload helped predict F2WC. As South African Hindu women are increasingly making investments in their education and careers, their involvement in their work role seems to be growing in importance. Hence these women may perceive their traditional family role duties preventing them from adequately meeting their work role responsibilities increasing their F2WC. These findings are consistent with past studies (Michel et al., 2011).

Gender role ideology moderated the relationships between work involvement and work-to-family conflict although in the opposing direction than hypothesised. A possible explanation for this may be that high work involvement for Hindu working women in South Africa may provide them with a sense of purpose and stimulation beyond that of their traditional family role, thereby weakening the effects of the work demands interfering with their family. Gender role ideology also moderated the relationship between work overload and F2WC. This is possibly because those who have more traditional gender role views spend more time and energy in their family role. Thus when work demands are high, their family role may hinder their performance in meeting their work demands, thereby increasing their F2WC.

Limitations, future recommendations and conclusion

A few limitations are noted in this study. Cross-sectional data restricts inferences about causality (Hair et al, 2003). Surveys are susceptible to social desirability bias, although it is argued that on-line surveys are less prone to social desirability bias as a result of increased anonymity (Booth-Kewley, Larson & Miyoshi, 2007). Future research should consider the coping mechanisms utilised by women of ethnic groups in managing the work-family interface.

These findings have implications for South African organisations wanting to attract and retain a diverse workforce and thereby contribute to national imperatives to redress past discrimination experienced by designated groups in the labour market. This study provides evidence of the work-family dynamics experienced by Hindu working women with the aim of assisting organisations to support these women, and all those from traditionalist cultural backgrounds, to better manage family expectations whilst fulfilling their work duties.

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The young child and his cultural vision of the world

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Abstract

Using a phenomenological approach, we met several children across kindergartens within the Yunnan province, South-West China. We asked them to draw two different pictures: one of “their family/home”; one of “their friend’s family/home”. After each drawing, followed an interview. Everything was recorded. We analysed the drawings and the narratives (MCA-Minerva). Our results showed the importance for the children of getting together. About their friend's family/home, they were less expressive, although always showing positive feelings. Most of the time, they talked about themselves. Besides, we found almost the same composition in all the drawings. In the countryside, the children had substantial difficulties to imagine. This present research gives us an idea of the Chinese people way of thinking, influenced by their cultural environment, by studying their children.

Introduction

After several research focusing on the teachers and parents point of view (Blanchin, Sages), we wanted to get closer to the children' cultural vision of the world, because children are the future adults and can therefore tell us a lot about their cultural environment and how it is orienting them. I used a phenomenological approach and the *Emergent Design*. With the great help of Professor Roger Sages, but also Chinese teachers and students there. I met several children across kindergartens in Ningbo and the Yunnan province (aged between 5 and 6).

First, we will describe the interests of the research, regarding the role of contrasting management, economic, and religious paradigms in the workplace. Then, we will expose previous works related to child development and culture. Next, we will explain our method. We will also describe the results and interpret them. At last, we will offer a short discussion about them and what they enlighten.

Interests of this research, regarding the role of contrasting management, economic, and religious paradigms in the workplace

Sometimes, we can observe how difficult it is to communicate and work with people who grew up in a cultural environment (understood as a vision of the world) that is different from our own. From the director of a multinational company to the kindergarten teacher, we all live intercultural situations. That is to say situations in which you are surprised by the behaviour or way of thinking of someone working with you. Sometimes, you don't even understand this person and it can become very complicated to work with her. This kind of situations tend to increase with the modernization and the globalization. People travel, live abroad, get in touch with different ways of thinking, meet more often.

Differences are very interesting and enriching, as soon as you make the effort of listening and trying to understand why there is a difference and how come you don't see things the same way. If you content yourself with seeing the differences and considering it as strange and disturbing, then you won't have the chance to live an enriching experience.

Anyway, our research is not only about having an idea of how Chinese children think inside their cultural environment. It is mostly about getting to know another vision of the world, how young you start to be influenced by your cultural environment and the great importance of this specific way of thinking in everyday life (at work, in your family, etc.).

So, what we want to underline here is that, in our case, by understanding how Chinese children develop according to their cultural environment, we can learn a little bit more about how they think as Chinese grown-ups. Therefore, we can know better how to interact with them and appreciate the differences, comparing to our occidental cultural vision of the world, for instance. The way Chinese people see the world and behave can give us an idea of how they behave in the workplace. Thence, this research can bring some ideas of how to improve our intercultural communication and inspire analogical research in intercultural environments.

Previous works related to child development and culture

It is important not to consider the child as inferior to the adult, in any way (intellectual, cognitive, etc.). Indeed, it has to be considered as a being, thinking and feeling the world differently. Maurice Merleau-Ponty highlights Henri Wallon's idea of *ultra-things* in *Psychologie et pédagogie de l'enfant*. By *ultra-things*, he means things that can't be neither touched, observed or modified. Children can't integrate a great number of *ultra-things*. The dogmatic rationalism in psychology separate adult and child. Their mentalities are considered as too far away from each other for a communication to be possible. But the child is not enclosed in another world. The adult can understand, by analysing his own considerations of ultra-things, what the child lives and then, try to put himself in their place. So, a human relation can totally establish itself, we just have to be aware of this phenomenon. If the adult can reach this level of understanding of the child, the relation he will have with him will be better because more enriching.

Jaan Valsiner defines culture as an orientation taken by the child, passed on by his entourage. This definition is very interesting because culture can be considered from multiple angles, and it is not only about the ethnic or folkloric aspects. By understanding this thinking orientation process, especially within the Chinese school institution, we can have a better understanding of the Chinese culture, that is to say how Chinese people constitute meaning on the world around.

Even if he was controversial, Jean Piaget brought essential knowledge to the field of Child Psychology. Amongst others, he worked on child' symbolic representations. The child is constantly learning, adjusting his schemes to new data from reality. According to Jean Piaget, *Assimilation* (translating incoming information into an understandable form) and *accommodation* (adapting current knowledge structures in response to new experience) are the two processes of this adaptation. The evolution of the symbolic function of the child is considered by Jean Piaget as a succession of stages, which is what his successors criticized. We do not agree with him on this particular aspect, we consider that each child evolves differently and at his own pace. But we can still use the information he gave about the *intuitive thought stage*. At this moment, the child is into an *egocentric thought*. Little by little, as and when the child socializes, this egocentric way of thinking will fade and he will more and more consider the phenomena taking place around him as beyond his influence. Gradually, a balance between *assimilation* and *accommodation* sets in.

We can see that the child's vision of the world is very different from the adult's. That is why, in addition to the ethnic difference, as a researcher and a phenomenologist, working with children demands to be able to detach ourselves and reflect on our own pre-comprehensions.

Before the present research, we have already worked on the link between child development and culture. We conducted studies within several kindergartens in France, Sweden and China (Blanchin, Sages). These researches were more about the teachers and parents' view on the child and his development and the influence of the educational system on it. We always used a phenomenological approach. The results showed that the child is cultural and really can be understood and pictured differently from one culture to another. The child development cannot be thought in a universal way, because each child interacts with his culture and learns the orientation given by it.

Method

Phenomenology is originally a philosophical thought system developed by Edmund Husserl. Because of a strong and misleading separation of philosophy and psychology, it has been difficult for decades to use another method than the positivistic mainstream one in psychology, ironically itself founded on the Logical Positivism philosophy of thinkers gathered around the Wiener Kreis. But Husserl did not develop his thought only for one field, but gave solid basis to every scientific research, in modern physics as well as in human sciences, and more particularly in psychology. Phenomenology consider the human being as the unique centre of the research because he/she is the one who gives meaning to the life-world in which he/she lives. The life-world is what surrounds us, everything that we give meaning to and get meaning from (Sages and Lundsten, 2006).

So, children are considered as individuals giving meaning to their life-world. Phenomenology allows us to consider our pre-comprehensions (cultural, personal, etc.), in order to try our best to step back from it. Then, we can try to have a better understanding of the way children give meaning to their life-world.

Too often, researchers in psychology want to see their hypothesis confirmed and formulate generalizing laws dragged out their observations. Unfortunately, such thing is too easy to be true. If we want to discover some universal features in human beings, phenomenology show us that we need to study them in depth, to be able to understand how they constitute the meaning and to find what could be universal with it. But as researchers, we need to be aware that generalizing is very easy and should not be our goal. My aim is to propose a vision of things according to observations made in several kindergartens in the Yunnan province in China. From this vision, I can draw some conclusions about the influence of the cultural environment on Chinese children and propose some interpretations. I do not take the credit for having discovered a theory about the human being, generalizable to all of them. I just offer a suggestion of what things could be, in some cases.

Our goal was to understand how children put meaning on the world around them. We have met children between the age of 5 and 6 years old. We decided to use drawing as a mediation support. A chinese-english translator was also there during the procedure. In order to have an idea of the child view on his own culture, we decided to give him the following instruction:

Can you draw your family? You can make it do anything you want, you can draw everything you like around it, you can choose all the colors you have here.

Once the drawing was finished, we had an interview with the child. The child had to describe his/her drawing and according to what he/she said, we asked some questions like : What are they doing? Do they do it often? What moment of the day is it? What's happening inside/outside the house? Etc. Then, we reiterated the instruction, but this time, with his friend's family:

Can you draw your friend's family? You can make it do anything you want, you can draw everything you like around it, you can choose all the colors you have here.

Then, we did a second interview with the child, following the same procedure than before. With the agreement of the children and the kindergarten, all the interviews were audio-recorded and we also recorded videos of the children while they were drawing.

We have met about fifteen children during our travel. Then, for a matter of time, we chose four of them, each being from a different kindergarten, and analyse both their two drawings and their two interviews. Our method is based on the Meaning Constitution Analysis, a phenomenological tool which is used for in-depth analysis. We analysed the drawing constitution by watching the video, but also the drawing content (symbols, patterns, etc.). Finally, we studied the children narratives using the MCA-Minerva software (developed by Roger Sages).

With a three steps analysis of the narratives via the software, we obtain the real meaning constitution of the child. Sentences are divided into meaning units, for which we attribute modalities, that is indications about how these words and expressions appear. Then, for each meaning unit, we need to reconstitute the different partial intentions which led the person to write what she wrote. For each partial intention, there are entities; they are what appears as existing for the child, and predicates; tied to their entities, they highlight their meaning as experienced by the child. It is a meticulous analysis of the words and expressions of the individual.

We also used the Emergent Design approach. The point is to allow the methodology to evolve according to what appears on the field, from the beginning of the research till the end of it. We can reconsider our objectives if new ideas arise. Success in generating hypothesis and theories often depends on a flexible use of research methods.

Results

In the first drawing (of the child's family), we found some differences and similarities. The idea of being together, with all the family frequently appears and seems to be important. For instance, here are the entities and predicates used by the children, most of the time, to identify or qualify their family:

Entities	<i>Hand in hand</i>
	<i>All of my family</i>
	<i>Together</i>
Predicates	<i>who can live together</i>
	<i>who can be together</i>
	<i>who always get together</i>

One of the children were living in the countryside, where the way of living is very different from the city. In China, children in the countryside do not get a complete school education, classrooms are packed and most of the children stop school early. That is probably why this child's answers were much more poorer. We saw here how importance school education is in China, regarding the acquisition of the imagination ability.

Then, we have noticed in every child the presence of the *egocentric thought*. This seems to have nothing to do with the school level or the sex, they all have this egocentric vision of their environment. The world seems to organize itself around and according to them.

Globally, it is more difficult for these children to express themselves orally than on the drawing. We found much more emotions and positive feelings on the children' drawings than in their words.

In the second drawing (about their friend's family), they are all less expressive, comparing to the previous one. Drawing shows less emotions (positive or negative). But when it does, it is always positive.

Then, the *egocentric thought* is there much more detectable than before. Even if they are drawing their friend's family, they always represent themselves on it.

We also observe a link between socialisation and ability to talk about the friend's family. The child from the countryside, for instance, just started school and doesn't know a lot of children, he is much more in this *egocentric thought* than the others. He does not have any representations of his friend and his family, or at least it is not visible in his drawing or his narrative.

Generally, the elements on the children' drawings are often the same. Indeed, they are the result of school learnings. Children reproduce what they have learnt. They don't often allow themselves to create new elements. Even the child who did not learn drawing technics does not let go to scribbles or non-figurative forms. It is like he would rather not draw a thing instead of producing something non-representative. The "expression through drawing" seems to be mainly a school learning for these Chinese children.

About their ability to put words on their drawings, we notice that it is more difficult for them than the realization of the drawing itself. They seem not used to it, or at least not very comfortable in the oral expression of emotions and thoughts.

At last, the absence of negative feelings in the children' drawings and the narratives about their friend's family can indicate that these children do not have negative representations of the other and his environment. It can be the sign that the multicultural context of the Yunnan Province, where a lot of minorities (half of the Chinese minorities) cohabit, has an influence on the children' representations of "the other".

Discussion

So, the child in China would evolve within his family, first, with the idea that being together is the most important thing. The other exists, even if children sometimes have difficulties to talk about it beyond their own presence, and the other is not a source of negative feelings.

However, orally expressing themselves appears to be difficult for these children. We can maybe say that these children tend to always show what is positive and it would be difficult to see what is wrong.

During our research, we have met some difficulties that can be linked with our results. Indeed, the translator was aware of the aims and the method of the study. During our observations, we saw that the children were very assisted, supervised and they did not have a lot of opportunities to let their speech and creativity run wild. During drawing classes, the best pupil is the one who can reproduce the more accurately what the teacher drew. So, even the translator tended to have this supervising attitude with the children and sometimes, when they did not know what to say, she gave them some ideas about what they could say. She also wanted to be sure we will have results, that is why she was sometimes leading the child into a direction. She was afraid the absence of answers would be bad for us, even if I explained her it would not. But this issue shows that Chinese children are not encouraged to freely speak or think, they are led into a precise direction.

Moreover, the children were always chosen by the teacher for their good marks. We never had the chance to choose randomly the children we were willing to work with. Teachers attached a lot of importance to give a good impression of their kindergarten.

Also, we noticed that children always called us « lǎoshī (老师) », which means “teacher” in Chinese. The teacher is very respected and always waits for “The” good answer. They are never several of them. Thanks to the Emergent Design, we always tried to be aware of this kind of elements, in order to improve our approach with children. The translator told us that it is maybe easier for the child to put us into this teacher position. But at the end, we decided to introduce ourselves as their “friend”, not here to judge but to get to know them. We wanted to show them that we did not know anything and they were here to give us this knowledge. That is how the phenomenologist should always be in this position, a humbleness position.

At last, it is essential to underline one notable issue we encountered during our research. When we planned the drawing-interview procedure, we thought we could meet the children one by one. But when we got there, our Chinese partners explained us that the children will certainly feel more comfortable with us if they are in group, because they need the group support to feel free to express themselves. It did not seem to be conceivable for our partners to let us meet the children alone. Therefore, we decided to meet them per group of three. For us, changing our procedure was a part of the adaptation process allowed by the Emergent Design procedure, essential when you are willing to work as a phenomenologist. The aim was to make the children comfortable so they can talk freely. Moreover, this need to be in group has been experienced by Isa Jertfelt with Chinese adults, and it appears to be a distinguishing feature of the work with Chinese people (see *A methodological Dilemma*, Alice Blanchin and Isa Gustafsson Jertfelt, in preparation, Lund University).

Conclusion

The results we obtained and the interpretations we made need to be considered as a way for us to get a picture, at one moment, of what Chinese culture (as an orientation of the mind) could be. The great importance of being together with the family can be linked to the similarities we found among the drawings, but also to their need to be in group during the procedure. All these observations give us an idea on how to interact with Chinese people. We certainly need to

respect this group thinking and the importance it has comparing to our occidental way of thinking, for instance.

It also shows us the importance of taking a step back when you meet people with a different cultural background. What is an obvious fact for you can turn out to be seen completely differently by the other. And if we didn't use the Emergent Design, we wouldn't had taken into account what our Chinese partners said and maybe we would not have obtained any result. Moreover, we could say that the drawing-interview procedure is not even the most important part, but all the issues we had around are. They show us two things: first, how enclosed we can be, sometimes, in our pre-comprehensions. Secondly, how wrong can be your research if you blindly fall for them and don't take time to observe the environment, talk with the people there and learn about how they would have done it, and so on.

By comparing to other cultures, this question of the nearly absence of negative feelings and the drawings' similarities would be interesting to study. This present research, by studying the Chinese children, gives us an idea of how Chinese people behave and think in their cultural environment. This kind of study can be done with every type of population within an institution: retirement home, etc. Studying their world's vision is essential to get to know how the institution and them influence each other. It is an important work to do in today's multicultural societies and institutions if we want to give the best to each child, each elderly person, etc.

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How “old” is old? Meaning constitution of “aging” and its shared meaning across cultures

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Abstract

The present study is an explorative research to look for eventual effects of how cultures and societies influence individuals in their ways of constituting meaning of “the elderly”. In this paper, we specifically used interviews and self-report questionnaires. This explorative work is based on a phenomenological psychological approach derived from Husserl’s phenomenological philosophy. The current study analyzed outcomes with the MCA-Minerva software developed by Roger Sages. Through this, it allows us to unveil many constituted meaning layers of the participants’ words and expressions, and make sense of the participants’ life-world experiences and other underlying meanings. The outcomes revealed several similarities and differences, within and across cultures. An in-depth analysis presented an individual’s inner richness and her possibilities of development. The outcomes indicate promising prospective exploration in many other diverse aspects and directions.

Introduction

“The elderly” or “aged people” can occur naturally in daily speeches. However, thinking from a phenomenological point, there are no “aged” people, but only the meaning of it. The meaning refers to which people are seen as aged, and what is meant behind “aging”. We hold that where there is human, there is meaning; where there is meaning, this meaning has been constituted. The meaning of “aging” is constituted this way, and it must happen in a specific cultural or social context.

The “young”, who are physically and mentally able, as compared to “the elderly”, takes an essential part in the meaning constituting process. Without the “young”, there would never be an absolute old age. Therefore, the purpose of our study is to look for eventual effects of how cultures and societies influence individuals in their ways of constituting meaning of “the elderly”. What does “aging” mean? Are there any similar meanings and common experiences shared by the elderly and/or with the societies? One of the main concerning issues is the society putting a “category name” on aging. We felt that, “There are no aged people, only the meaning of it”. Davis (2009) further addressed the problem of age discrimination and injustice:

“Present and past conditions of the welfare state have not been favourable to the aged, particularly for older women, minorities, and the poor. Social and institutional practices of age discrimination continue to serve as means to impoverish persons economically, politically, and existentially. The type of shift the welfare state undergoes will determine the extent to which social injustice grows with its aging population.”

This also galvanized the study to introspect “the elderly’s” thoughts about discrimination and injustice. Hence, we are proposing a broader, exploratory perspective study of different persons on aging, based on in-depth interviews, written self-reports, and online self-reports. By looking at this issue in a broader, exploratory perspective, we hope to discover which factors are of interest to examine from the perspective of the person. A phenomenological

approach was thus chosen as it allows for the revelations of the intentional relationship between the person and the meanings of the things they are focusing on and experiencing.

Phenomenology is primarily a philosophy that was initiated by Edmund Husserl (1859-1938) at the beginning of the 20th century. Three basic concepts would help to facilitate understanding of phenomenology and the current study:

- 1) *Phenomenon*: The term “phenomenon” is the most important aspect of phenomenology. It refers to what appears to someone, as long as one is consciously aware of. It can be a feeling, a dream, a memory, or anything.
- 2) *Epoché*: Husserl suggests that we live in “*captivation-in-an-acceptedness*”: we tend to take things appearing to us for granted. So, “epoché” means to suspend such judgments and pre-comprehensions to examine phenomena in the way they appear.
- 3) *Intentionality*: Intentionality is the essential property of consciousness. The simplest meaning of this is that consciousness is always and only what it intends to be whatever it can be. So, associating to the term phenomenon, consciousness intends in and by a phenomenal appearing. Both what is appearing and its way of appearing are non-independent parts.

Notwithstanding the above three concepts, it is also essential to consider a key concept known as the *life-world*. The life-world generates and encompasses our experiences and the world of objects around us as we perceived them (Sages, 2006). In the life-world, a person’s consciousness is always directed at something in or about the world.

The method used in this study is derived from the phenomenological viewpoint and methodology as developed by Roger Sages in Meaning Constitution Analysis (MCA). In any experiment, when an individual is being taken out of his/her context so as to test certain variables, as in the positivistic approach, the result is that the validity of the results concerning the person’s behaviour would be severely compromised. The phenomenological approach considers every human being as part of his/her context, hence unavoidable in a scientific study; the individual is both forming its context and also being shaped by it – a passive-active interaction. In the same vein, removing his/her context from any particular individual compromises the behaviour and the essence of the subject which any researcher intends to investigate and renders it definitely unscientific.

Phenomenology is commonly used for descriptive purposes (Giorgi, 2009) but it can also be used as a way to unveil the meaning of a person’s context and life-world and to view it as he/she intends and views of it. Thus, explicating the motives leading to certain behaviour (Sages, 2006). To be able to achieve and extract meanings, it is crucial to look for what is said implicitly in the materials. This is so as the participants’ words truly reflects the postulates of the qualitative paradigm and looks to understand a situation as it is constituted. This form of qualitative research attempts to capture what makes the people say and do as they say and do – that is, the meaning constitution of their words and actions. Words which are expressed are the way that most people come to understand and relate their situations. This study will not try to look for a cause, effect or a relationship, since phenomenology in human sciences is about motivation, not causality. It is to apprehend the current phenomena and gain insights into them by unveiling their constitution of meaning acquired in life world experiences.

One purpose of this study hopes to discover if the meaning of “aging” has changed over time. If that is so, how and what is/are the reasons for this change? What has the “young” contributed to the meaning constitution of “the elderly”? And how does this influence both

“the aged” as a group and “aging” as a phenomenon? As a cross-cultural study, we would also strive to identify the possible differences and similarities between cultures. Potential questions such as: Does the meaning of “ageing” vary across cultures? How does it differ from culture to culture? What factors are underlying the possible variations?

Methods

Participants

Participants consist of 15 females, 8 males, and 4 unmentioned. Ages of participants ranged from 17 to 73, and have different culture backgrounds: Swedish, Russian, Canadian, Singaporean, Chinese, Turkish, and 2 unknown. Participants aged above 20 are enrolled through interpersonal connections and snowball sampling, and participants under 20 years old were from a Swedish university.

In the interest of time, ten participants were selected for analyses of the current study. Participants are respectively coded from 1 to 10. Amongst these, six of the participants are around 20 years old, possibly providing views from “the young’s” perspective. Of the remaining four, two are above 50 years old, still employed, offering possible perspective during a period of transition (from adulthood to elderly), and the other two participants being over 70 years old, both retirees. The number of females and males is balanced in each of the above age group. Nationality-wise, half of the participants were Swedish, ages ranging from 17 to 73; 3 participants were Chinese, 1 was Singaporean, and 1 was Turkish. The purpose of this is to obtain diverse perspectives across genders, nationalities or cultures, while the amount of perspectives being relatively balanced.

Qualitative research, by its nature, requires a small sample size to support the process of extracting *thick, rich* data (Lincoln & Guba, 1985). The issue of representativeness is not a relevant issue in relation to the selection of participants or how many participants one needs in the same sense as it is in quantitative research. As should be obvious at this point, both natural scientific and human scientific studies are needed because they serve different purposes, that is, the attempt is to answer a different type of research question. In this case, purposive sampling, considered by Welman and Kruger (1999) would be the most appropriate kind of non-probability sampling, so as to identify the primary participants. The sample was selected based on the purpose of the research (Schwandt, 1997).

Procedure

The data was gathered through interviews and self-reports. Individuals are free to choose the way they feel most comfortable with, so as to remain as close to the phenomenon as possible. This also minimized the risk of methodological biases and ensured that the selection of participants did not only include people living in a certain community, or people who feel comfortable to speak about these issues openly, or people who feel comfortable in expressing themselves in written language etc. The participants have not been chosen to participate in these different ways randomly but rather by their own wishes and/or practical possibilities.

Free-Response Questionnaire is applied in this study. As pointed by Sages (2006), a question used for a phenomenological study should be open ended and include as much as possible to avoid steering the respondents answer in a certain direction. The written self-report would be a free-response sheet with the following instructions:

“We would be very thankful if you could write anything that comes into your mind when you think of the elderly. It can be, for example, your thoughts, feelings, ideas or experiences, or even interactions with the elderly. There are no right or wrong answers and you need not bother about literacy/grammar so feel free to write as much as you want. Your contribution is very important to us and will remain anonymous and confidential. Thank you.”

The online self-report is similar, except for being created on an online survey platform (<http://www.surveymonkey.com/s/RNJCWMM>). Participants interviewed would have the same instructions read to them at the beginning. The whole data collection consists of 3 face-to-face interview sessions, 1 dialogue session involving 2 participants, 12 written self-reports, and 10 online answered self-reports. Analyses were done on the Minerva, Meaning Constitution Analysis (MCA) software version 2.0.0, developed by Roger Sages.

Outcomes

In this section, we will present a detailed analysis with Participant 6, followed by a general view of outcomes with the common factors in it.

Example of Detailed Analysis

1. Modalities

In the self-report, Participant 6 expressed about 68% of *Belief* modality in Doxa-affirmation, which indicates that one had no hesitation or doubt with those meaning units. Doxa-negation contributed about 15%, suggesting the participant had been certain when denying something. Possibility and Probability together contributed about 18% of all *Belief* modalities, hinting that Participant 2 left some open space for other possibilities while narrating.

Corresponding with 18% uncertainties above, Imaginative takes up about 16% of *Function* modality. Besides that, Perceptive accounts for the most part, about 75%. The rest 11% attributes to Signitive meaning units, which indicates possibilities of further questions. On Time modality, except for Empty, Past accounts for the second largest part, which is about 43%. Only two meaning units are concerned with future. It is likely that the participant was concerned with something in the past. *Affects* modality consisted of 86% neutral, 10% negative and 3% positive ones. One can tell that most of the time the participant was narrating in an uninterested manner. Among the 10% negative ones, 7 meaning units were narrated in a present tone, and the other 10 were in a retrospective way, which indicated negative affects about something in the past.

2. Entity and following predicates

Including those indicated (e.g.: they, those people) by personal pronouns, for Participant 6:

The elderly is someone that	exists
	can get on a bus
	can be sick
	become surplus
	are never listened to
	could get the support
	tend to get neglected and isolated
	got more ill
	got more isolated
The young people is someone that	has the latest knowledge
	come with their book learning knowledge
	say how things should work
	are not with practical understanding
	haven't lived long enough
	are out on facebook
	can come in and push out people with experience
Children is someone that	exists
	can grow up
	would say that grandma died at home
	are part of grandma's dying
	would come at the funeral

Life-world Descriptions

This is a long narrative derived from an interview. The participant appeared eloquent in the interview, regardless of the language used (i.e. English) as it is not her native language. Also, the two themes have been closely intervened in the narrative, being similar but not completely the same expressions. This consistency could suggest her familiarity and deep impression with this sort of experience (i.e., the situation “the elderly” are in).

The elderly expressed in the text is someone that become surplus, someone can be sick, someone tends to get neglected and isolated, someone are never listened to, etc. Meaning units with “the elderly” in are mostly negative in terms of *Affects* modality. Furthermore, while speaking about these negative images, the participant was in an affirmative tone, which means she sees this in a either black or white way.

Although she held a negative perspective about the general situation “the elderly” were in, Participant 6 did see herself in the same light. She would say “the elderly” are seen as useless, but she did not say “I feel that I’m useless”. This is the same case while she speaks about “death denying”. She takes it as a problem, but at the same time, she came up with solutions, which is “to voice it” and let dying be “part of the family”. Her professional experience and personal efforts might provide an explanation for this: “*I’m a nurse. I have what I’m specialized in, which is to take care of people who are dying. Sweden is a very very death denying country... I’ve been one of the pioneers in changing this in Sweden.*”

Two special themes can be generalized from appeared:

1) The role conflict between “the elderly” and “young people”

Meaning units with “the elderly” in are almost all negative in terms of affect-modality: the elderly become surplus, the elderly are never listened to, the elderly tend to get neglected

and isolated, etc. But while speaking of the elderly “being pushed out of society”, Participant 6 specifically speaks of a process “*The younger people have the latest knowledge, and they say how things should work. So they come in and push out people with experience*”. Seemingly, a role conflict between “the elderly” and “young people” appeared to the participant and contributed to the meaning of “the elderly”.

2) Death denying

Discussion on death took up most parts in this narrative. Thus one can tell how much it meant while the participant constituted the meaning of “aging”. Under this theme, Participant 6 conveyed the following perspectives:

- a) Sweden is a death denying country as compared to the past;
- b) people are afraid of death, thus they do not talk about it;
- c) denying death would not help reduce the fear of it; one should talk about it openly;
- d) death should be involved in a bigger context in order for it to be less fearful to one
For example, children are potential persons that *would say that grandma died at home*, someone that are *part of grandma’s dying*. According to the narrative, involving the dying elderly into the family would make death more natural.

In sum, this participant showed critical thinking, corresponding solutions and personal efforts to change unsatisfactory situations. Therefore, we tended to believe that she has good coping strategies with “aging”, which indicates good psychological adjustment to some extent.

Underlying meanings

Settlement of “the elderly”, especially the majority of them without employment, can be read as an underlying social dilemma from the text. On one hand, the society needs capable individuals to keep it functioning. What is capable? “The elderly” appearing to Participant 6 is the opposite example: getting less productive due to physical ailments, costing the society extra money for health care, lack of latest knowledge, etc. On the other hand, all the above do not justify the society’s exclusion or disrespect upon “the elderly”. Direct economical contribution or latest knowledge seemed to be partial measurement of a person’s value. “The elderly” have practical experiences, which mere book-learning would not endow one with. Most importantly, “the elderly” are foremost human beings. This is an identity different from products, which can be more justifiably judged by material value.

Combining all the above outcomes, this participant seemed in a way, depressed. In normal daily discourse, “future” can be an important ever present part, for what we do now is aimed at something in the future, be it near or far. “Future” and “present” should be closely related. But according to this participant, only two meaning units are about the future, which are also in negative Affects: “*The older you get, the less you are valued.*”

General Views

As generalization feedbacks from the 10 participants, it seemed that many of them expressed relatively negative or pessimistic perspectives about “the elderly” and the situation they are in. Similar expressions about “the elderly” appeared in narratives across different subjects. The so-called “negative meaning” consists of a few layers (overlaps may exist between them):

1. Occasional disrespect

For example, according to Participant 2, “the elderly” can be “*not always seriously taken*”, and “*not always respected on buses and trains*”. Also according to Participant 1, “*In many traditional societies old age is regarded with consideration and elderly persons are met with respect. This is definitely not the case in Sweden!*”

2. Out of the society

“You are sort of shoved out of the way” (Participant 9); *“In my society, when someone starts getting old, she/he is expected to withdraw herself/himself from the daily routine”* (Participant 10); *“I believe we live in a very strange society where the elderly often are pushed away...”* (Participant 8)

3. *Seen as being less useful*

“The elderly, dependent on their pensions, are regarded as ‘non-productive’ (Participant 1). Also, *“the older you get, the less you are valued”* (Participant 9).

4. *Inconvenient and burdensome*

With Participant 7, “the elderly” can be someone that is *“an inconvenience”*. As Participant 9 put, *“... if you are sick or old, you become a burden”*.

5. *Badly treated in care services sometimes*

“There has recently been an increase in incidents of sheer maltreatment of persons living both in private or public homes for old people ...” – Participant 1

“But in Sweden the nursing homes...are really bad. My boyfriend works at a nursing home and the government stopped the heat in the house to save money ...” – Participant 6

“When I think about the elderly, one thing that immediately comes to mind is medical care, as my grandparents have seen a lot of doctors lately. They often complain about how doctors and nurses treat them badly or are ageists.” – Participant 2

Cross-culturally, the meaning of “the elderly” did appear differently in the narratives of participants. The main differences mentioned across cultures are:

1. *Family enrollment of “the elderly”*

“Old people in other countries, they are still a part of the family. They are incorporated in the family. It's often grandparents to take care of the children, so they still have a task, something for them to do. Here, they become surplus...” – Participant 6

“I will take care of my parents when they get older instead of putting them into a retirement home.” – Participant 9

2. *Respect for “the elderly”*

“In many traditional societies, old age is regarded with consideration and elderly persons are met with respect. This is definitely not the case in Sweden!” – Participant 1

“I’m from the Turkish society which blesses... respect towards elderly.” – Participant 9

Even if not contrasting cultures on purpose, perspectives of participants from Asian societies differ from the western. For Participant 4 from Singapore, aged people can be *“experienced, respected”*; while Participant 3 from China thinks of the “elderly”, *“the image is wise and experienced. Years wrinkled their brain and body, but the wrinkled brain could store more information...”* From the above statements, one may see that in eastern cultures, “the elderly” are valued and respected to some extent for their life experiences. Interestingly, besides differences, similar form of wishes can occur as well across cultures:

1. *Family involvement*

“I believe they usually feel lonely and they hope that they can be surrounded by families and friends” – Participant 4, Chinese

“I think I will take care of my parents when they get older instead of putting them into a retirement home.” – Participant 9, Turkish

2. *“The elderly” should be listened to more*

“Talk with your grandparents, ask them about their life stories.” – Participant 6, Swedish

“They are really kind and nice people if you take time to listen to them! They deserve to be treated right!” – Participant 10, Swedish

"I know that calling my grandfather on the phone makes him very happy or when I visit him ...he is extremely pleased." – Participant 9, Turkish

Discussion

From the current study, one of the biggest viewpoints indicates that there is no concept more fundamental to aging than the concept of time. Its function served as a pivot for this categorization and ageism. As Participant 5 supported, *"The essence of "gradualness" (in relation to aging) is time. I think time is more incredible than space, as music being the art of time, is more mysterious than paintings being the art of space. Because no matter how big the space is, it's always possible hold one side, or at least one point of it. But there's nothing to be held with time, no way to retain it."* From this, we can identify that "aging" has to conform and meet the standards of time. Future exploration could investigate how this stigmatization comes about, how this would differ across cultures, and how society can cease to marginalize "the elderly". In addition, "dying" was a recurrent topic which should not have appeared but it did; *future* was the topic that should have appeared but did not. On this question, Sages suggests that the participant's society is making one sick.

From another perspective, the idea of "disrespect" had appeared very frequently, but how was this relation established between "the elderly" and "the young" was not clear. In line with our phenomenological viewpoint, originally there should be no "disrespect" either, but only this phenomenon as it appears to us. From Participant 6's logical statements, "the elderly" are not *useful* anymore; hence "the young" do not show them respect. But when speaking of 'usefulness', one is doing relatively rational thinking, addressing what the society needs, what the elderly can do and cannot do. However, are we rational all the time? Is everyone who is disrespectful towards the elderly picked up this manner from logical thinking? Probably not. Besides the seemingly reasonable logic above, what other factors contributes to people's disrespect towards "the elderly"? When speaking of "I don't respect", what does it exactly entails us to feel for/against to? Also, what could be the motivations and affects of doing so? Other perspectives may also be attributed from education, family and peer influences, or even direct interaction between "the young" and "the old". However, these deductions are too general and require further fine-tuning. Still, we would not take things happening to us for granted; neither would we stay at the general meaning of it. These questions would be really good for our further investigations. We believe and hope that this study could provide insights for future research.

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Accommodating religious diversity in the Canadian workplace

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Abstract

In 2013 the Parti Quebecois minority government introduced the “Charter of Quebec Values”. An extremely contentious legislation, it proposes to ban religious headgear such as Islamic hijabs and niqabs, Sikh turbans, and Jewish kippas, as well as large Christian crosses, for all employees in the public and broader public sector workplaces, including public servants in government jobs, police officers, judges, prison guards, childcare workers in daycares, staff and nurses in hospitals, school and university teachers, in the province of Quebec. In contrast, Ontario is accommodating religious differences in the workplace. This paper contributes to the discussion on religious accommodation in the workplace through interviews with hijabi women from the provinces of Quebec and Ontario.

Introduction

The debate on religious accommodation in the workplace has been on the increase in many countries receiving immigrants over the recent years as more immigrants are retaining their cultural values and customs as well as beginning to exercise their rights and freedoms in living and working in their adopted country of residence. As a country of immigrants, Canada is also adapting to this challenge. Although Canada has always welcomed immigrants, the earlier immigrants were predominantly white Anglo-Saxon people from Europe while the majority of the more recent immigrants are visible minorities from Asia, South Asia, Africa, and Latin America. For the past decade, about 250,000 immigrants have been arriving in Canada every year. The majority of them choose to settle in Toronto, Vancouver or Montreal, making these the top three most ethnically diverse cities in Canada. As these immigrants move out into the rest of Canada, in search of job opportunities, many Canadian provinces are becoming cognizant of the need for religious accommodation in the workplace in response to their assertion of maintaining their religious practices and cultural heritage. However, in the province of Quebec these assertions are often perceived as uncompromising, even militant and dogmatic, demands on historical organizational policies and procedures. Recently, the government of Quebec reignited the sensitive debate over religious freedom and accommodation by claiming that, as a secular state, it is entitled to remove all religious aspects from the public sector workplaces. But is there any evidence that religious observance, particularly by wearing outward symbols such as the hijab, niqab, kirpan, kippa, cross, etcetera, is disruptive to organizational life, employee productivity and effectiveness? Should the diversity of religious beliefs and practices be accommodated in the workplace? In this paper, we present some answers from hijabi women in Canada.

Canada

Evidence that global changes are impacting the roots of our Canadian society and workplaces is indisputable given the increasing diversity of immigrants coming to Canada. Fortunately, Canada has been in the forefront of welcoming diversity and change in its population and society by enacting the first Multiculturalism Act (1970) in the world and a points-based immigration system to screen potential immigrants for their successful integration into Canadian society, consequently becoming well recognized around the world for its generous immigration levels and respectful anti-discrimination policies. The Canadian Charter of

Rights and Freedoms (CCRF) of the Constitution Act 1982 prohibits discrimination in employment on the basis of race, ethnic origin, colour, religion, sex, or mental and physical disability and supports employment equity programs under Section 15(1) (CCRF, 1982). The Canadian Human Rights Code (CHRC) prohibits discrimination on eleven grounds: race, national or ethnic origin, colour, religion, age, sex, sexual orientation, marital status, family status, disability or conviction for which a pardon has been granted (CHRA, 1985). In 1986, Canada also enacted the Employment Equity Act (EEA) which was revised and strengthened in 1995 and specifically emphasizes the need for employers to promote equality by the implementation of special measures and accommodation of differences. It recognizes that failure to accommodate would have a negative impact on immigrants, their job opportunities and integration into Canadian society, increasing their discrimination and exclusion. Therefore, the law does not have to be applied in the same way for everyone. There is a legal obligation on employers to implement 'reasonable accommodation' and using the concept of 'undue hardship' for justifying why accommodation is refused by the employer. Through self-identification the sharing of responsibility for accommodation between the employee and employer is encouraged.

Quebec

The province of Quebec has historically claimed a special position in Canada as a result of its charter status, French language and distinct culture. The issue of Quebec's identity is a long standing debate which is also recognized and protected in the Canadian Charter of Rights and Freedoms in the Constitution Act of 1982. However, as more and more francophone immigrants are moving into Quebec especially from the former French colonies which are primarily Islamic countries or cultures, the province has been facing increasing requests for religious accommodations. Some of these have been very public debates over controversies such as the ban on the Islamic hijab (headcover) and niqab (face veil). In response to requests for religious accommodation by women wearing the niqab, Quebec introduced "*Bill 94-An Act to Establish Guidelines Governing Accommodation Requests within the Administration and Certain Institutions*," in 2010, which applies to institutions providing education, healthcare, social services, and childcare services in Quebec. It would deny essential public services to women in niqabs due to public safety, communication and identification concerns. Choudhury (2012) argues that Bill 94, a recent legislation which requires all individuals to reveal their face when seeking government services in Quebec, particularly targets muslim women wearing the niqab and is related to Quebec's identity rather than its secularism. "The concept of secularism itself is deeply embedded in Christian worldview" argues Stemp-Morlock (2014) "therefore, whenever a Canadian says that religion has no place in a secular institution, they are in fact giving primacy to a culturally Christian worldview, around which this country built its institutions."

Premiere Pauline Marois' Parti Quebecois (PQ) minority government released its "Charter of Quebec Values" in 2013. This contentious legislation would ban religious headgear, such as Islamic hijabs and niqabs, Sikh turbans, Jewish kippas and wearing big Christian crosses in the public sector and broader public sector workplaces such as all public servants in government jobs, police officers, judges, prison guards, childcare workers in daycares, staff and nurses in hospitals, school and university teachers. Bernard Drainville, the Minister responsible for the Charter, defended it as the government's efforts to enshrine into law the secular character of the province. Quebec's Status of Women Committee recently released a report addressing the disturbing phenomenon of honour killings of women. "Banning hijabs won't halt honour killings" (Kay, 2013). Since 1977, 17 such cases have occurred in Canada

which are not exclusive to Muslim cultures but also include Hindus and Sikhs. The most recent being the Shafia family murders of three Quebec sisters and their mother orchestrated by their Afghan-born father, step mother and brother, who were all sentenced to life imprisonment in January 2013, with no parole for 25 years. The Quebec government immediately used it to support their proposed Charter with Bernard Drainville's statement, "I wouldn't make a direct link between the two, but the symbolism of the Charter may help us prevent these kinds of crimes. The Charter sends a very strong signal that equality between women and men is an important value, a non-negotiable value in Quebec society" (Kay, 2013). There was an immediate backlash across Canada to Quebec's Charter which continues to be fiercely debated on both sides.

The Hijab

For the Western world which has fought tirelessly for gender equality and the freedom of women's rights, understandably, the hijab provokes extremely strong negative reactions. Adorned in various forms, the hijab or headscarf; the niqab or the face veil; the chador or sheet which covers the whole body; the abaya which covers the clothes; the burqa which covers the whole body face and clothes are all perceived in the West as symbolic of female oppression and diminished women's rights. In fact, the Muslim woman's covering her body has long been a mystery to the West (Kingston 2012). It is ironic that the mystery, fear and threat of the hijab which is intended to protect the Muslim woman from the eyes of others, has in fact become the very thing that bring all eyes upon her in the West. Unfortunately, the events of September 11, 2001 (or 9/11) have played a major role in transforming this mystery into suspicion and vicious targeting of the muslim community, giving rise to anti-Islamic sentiment based upon a perceived threat of terrorist activities. So why do some Muslim women continue to wear it, particularly in Canada? Notably, the first key point is that not all Muslim women wear the hijab. In fact, only a very small minority do so. And yes, there are some women who are forced to wear it by the men or women in their immediate or extended family, as is the case in honour killings. There are also some women who feel pressured by their "madressa" (religious school) such as Irshad Manji (2004:10) who describes the "white polyester chador" as "a condom over my head" intended to protect her from "unsafe intellectual activity".

But a legal ban on hijabs does nothing for protecting the rights and freedoms of the modern hijabi women. Haida Mubarak (2007) explains that "it is ultimately each woman's prerogative to decide whether or not she will cover her hair. No one- not a father, husband or brother-can ever force a woman to cover against her will, for that in fact violates the Quranic spirit of 'let there be no compulsion in religion'". Meanwhile, there are some highly educated, independent, professional, empowered muslim women, of right mind, who personally exercise their rights and choose to wear the hijab. Mubarak explains her decision to wear the hijab as "the freedom the hijab gives me, the freedom from having my body exposed as a sex object or from being judged on a scale of 1-10 by strange men who have no right to know what my body or hair looks like." (Mubarak, 2007). She goes on to explain that the hijab is a form of modesty, security and protection, shifting the focus of attention from a woman's physical attraction, or lack thereof, to the personality that lies beneath. "By forcing people to look beyond her physical realm, a woman is valued for her intellect, personality and merit" (Mubarak, 2007). Understandably, the religious observers of the hijab in Quebec are livid: "I will never take it off. I would choose another job first" said Hajder Ben Houla, who is from Tunisia and a childcare worker at the QwaQwaq Daycare in Montreal's multicultural Cote-des-Neiges district (TGAM, Thursday August 22, 2013:A4). She adds that she and women

like her are feeling let down by the Quebec government on the one hand encouraging immigrants from predominantly muslim French-speaking north African countries such as Tunisia and Algeria but then changing the rules on their job prospects confirming that while Quebec wants French-speaking immigrants it does not want their cultural and religious values. However, the law would further inhibit immigrant integration. Nora Jaffary, chair of Concordia University's history department, is not a Muslim but she wore a hijab to work protesting Bill 60 which would require professors and non-teaching staff at Quebec universities to remove their hijab. However, like any other Quebec citizen, university students would not be regulated under this ban, unless they were working on campus as lecturers, researchers or teaching assistants, in which case they would also have to comply with the Charter. Critics object saying that the Charter is draconian and divisive.

Ontario

Ontario is not without controversy on the issue of religious accommodations for Muslims. The Human Rights Tribunal of Ontario recently ordered Human Rights Training to the owners of a Toronto restaurant and awarded damages of \$100,000 to three Muslim employees working there who were forced to eat pork, work on religious holidays and break a religious fast to 'taste-test' a soup during Ramadan (HRMOnline, 2013). A professor in Ontario complained that his university administration was offering too much religious accommodation to a student who asked to be excused from participating in a required group assignment because he did not want to publicly interact with female students. The professor denied the request viewing it not as religious freedom but gender discrimination which would be equally unacceptable if the case involved a student not wanting to interact with a group comprised of Blacks or homosexuals.

Stemp-Morlock (2014) explains that the argument "gender rights take priority over religious rights" is not supported by the Canadian courts which have ruled that no right is absolute thus automatically trumping another and that each case claiming conflicting rights must be judged on its own merits. The law applies tests to determine to what extent accommodation may be allowed or may need to be limited. The onus is on the party limiting the religious freedom to prove that it is necessary. Some people support the "slippery slope" argument fearing that starting to accommodate such oppressive religious rights will lead to further demands undermining women's constitutional rights resulting in women becoming second-class citizens. This conflicts with the rights of women who request such religious accommodation based on their personal values and beliefs. How do we decide between protecting their right to gender equality or their inalienable right to freedom of religion and conscience?

Stories of Hijabi women

Interviews were conducted with two hijab wearing (hijabi) women to hear their perspective on the discussion. One participant was from Quebec who has also lived in Ontario and one was from Ontario who has often visited Quebec, to compare their experiences in the two provinces. Both were professionally qualified working women who have travelled quite extensively internationally. Although the participants were francophone, both the interviews were conducted in English. Interviews, one and a half to two hours long, were audio-taped and transcribed for this paper. The first participant indicated that she was born and brought up in Quebec in a very traditional French-Canadian family. At the age of twenty-five, she felt an inner spiritual awakening and decided to wear the hijab. At that time she was working as a hairdresser in a beauty salon and her co-workers were horrified at her decision. But she was

determined, she said in her interview “I felt that I was a Muslim from inside...At the time I started, I felt really destined for it but my friends did not like it.” Her family too was shocked and unsupportive of her decision to wear the hijab, “My family was not happy when I started the hijab. I was twenty-five then, now I am fifty! Twenty-five years of not wearing it then twenty-five years of wearing it, I have passed every bad experience.” She started crying, “The most difficult thing is when they push every bad thing on Muslims but it is not in Islam! It is not correct to force it. You need to feel it yourself. If not, you should take it off,” she sobbed recounting the horrors of some hijabi women’s recent experiences in Quebec. “The Charter opened all the bad things in Quebec. Some ladies are asked to remove the hijab in public and some people spit at women wearing the hijab, and one woman’s hijab was pulled off her head in front of her son! You need to respect others. This is not correct!”

Comparing her experiences in the two provinces she said, “Most Quebecois people are not open to differences. They like to try the food but not more than that. Hijab was my own choice but after, I was treated differently. It is because of 9/11. It has changed everything. I work in the Catholic school and I am Catholic now still and also Muslim because many things between the two religions are very close, not much difference. I am married to a Muslim man. I became Muslim one year before I married him. I am very active with the mosque and Islamic center in Quebec and I was supported by them. Most of them were immigrants and students from French African colonies since they have the French language and not much English. I decided to have my kids and stayed at home with them. After ten years, I searched for a job and it was not easy! Then I moved to Ontario. I am Canadian but I had to start from zero, like most immigrants. I volunteered, retrained and went back to school for a two year diploma and now I am a supervisor at two centres. It has been fourteen years now and I still get “the look” but I am confident in my job. All those who know me, know me for who I am not for my hijab. You are what you are and they accept me as I am because they did not know me before the hijab.”

With respect to the accommodation of the hijab in the workplace she responded that “Every hijab shows the face for identification and can fit in with every workplace. Once the women start to wear the hijab then it is banned in the workplace, it is not fair to them in jobs. More women work in daycares, hospitals and schools. For sure it leads to discrimination, for sure, for sure!” However, she was not supportive of extreme accommodation. “I understand the point of the Charter. You need to leave your religion at home and the mosque. I am not in favour of the niqab because you cannot see the face. The hijab does not affect the workplace like Ramadan and five breaks for prayers during the day. I don’t expect accommodations for that. I do that at home after work. If the company can accommodate, they should. If you have the time for a break and can get coverage then do it. I am flexible, but I do my best, I am not rigid.”

Living in Ontario, she says that “In Ontario, we do not experience any problems. That’s correct! Come, we accept you as you are. In Ontario ‘We care what is IN your head, not ON it.’” she happily quoted a popular advertisement. Here, she lives a normal life. “I swim, I have a long swimsuit. I go to the gym, they know me there. I do everything. I am a person. I live here and I do what I want. I can’t give up the things I like. I like that people see me as who I am and not just the hijab.” She expressed that immigrants are especially vulnerable but they have the right to protect their culture and values, “Immigrants give respect to Canada but they don’t get it back. Immigrants need to adapt and they do. Quebec already has a ban on hijabs in schools. If both parents are Arab, they have a right to keep their culture. There are too many mixed families. I am Canadian, my kids are Canadian but my husband is not. You need to

respect differences. You need to educate people. ...Just like there are gay people in the workplace. I respect them and they respect me. I took a diversity course and you need to have it in the workplace because you can't judge people by how they look. Diversity is a good thing. We must respect it".

The second participant indicated that she came to Canada, from Algeria, seven years ago. Six years before arriving in Canada, she had started to wear the hijab at the age of twenty-five after completing two religious *Umra* (religious) visits to Mecca in her early twenties. After the first visit, at the age of twenty-two, she was not even thinking of wearing the hijab. But by the second visit, three years later, "In my mind the decision was already there. I was not influenced by anyone, it was from inside. I was thinking about it for a year and I was the first one in my family to wear it. My mother and sisters do not wear it because it is not traditional in Algeria. For them it was a shock! Some of my cousins also did not understand because before this I used to wear miniskirts and go swimming with them during holidays. But I have not changed, it is still me!"

She explained a little about her Algerian background where, as a French colony, "Most families did not know much about their religion as the French did not allow it. My mother used to go secretly to learn Arabic. My father's French was better than his Arabic which he had learned from his mother. So that generation is good in French but not in classical Arabic which is the language of the Quran. After independence on July 5, 1962, we started to watch TV and listen to preachers and started to learn more about our religion. In the 1990s, the ten dark years in Algerian history, some women started wearing it because they were afraid that they would be killed if they did not!" She further detailed her Algerian heritage, "Before, the only ones who would cover were the old women. There is a tradition in Algeria, there is a dress that women wear, not a hijab, but a big scarf and a long skirt, when going outside the home to do groceries etcetera. But my cousins said that I should have waited until I got married! Now, I have no regrets. I have made the right decision and I am not married. No, I cannot take it off now! There are some of my friends who started wearing it but when they are invited out, they take it off. I cannot understand it!...In Algeria, it is very flexible. I went back after three years, I was surprised to see the new hijab style. Some of them are not even hijab because sometimes they do not cover the hair and sleeves. A lot of women are wearing it, it's fashionable!"

She also faced workplace accommodation challenges in Algeria, "When I started wearing it I was teaching in a private school....My boss was not comfortable because of the students and said maybe I could lose my job. There were some old colleagues who wore it but I was the first young one to wear it at work. I told him I don't mind to lose my job. It is Allah that gives and takes away." She expressed frustration at the lack of awareness about the hijab in Canada and described her experiences in the two provinces, "To people who don't know much about this religion, most of the time I tell them that it is not my father, it is not my brother and it is not my husband because I am not married! For most women who wear the hijab in Canada, it is a challenge. In Ontario, I don't face anything here. I think in Ontario, there are very few wearing the hijab. Being in an Anglophone province makes a difference. They want to know before they start judging. I feel there is much more respect here than in Montreal, for example. When I go to Montreal, I don't feel that much at ease. I don't feel comfortable with the way people look at you. I have one example, like when I go to Montreal in the winter, I put my scarf in a different way. I put it like a French beret. All my hair is covered and I have a big sweater. In the summer, I can't. I can see the reaction of the people, it is completely different! When I wear the hijab or I'm wearing the beret style. I think that it is a judgement."

She does not support the Charter, “Sometimes I say, when I think about the people who are pushing the Charter in Quebec, there are so many things that are important to deal with in the world and they are making a big deal about this. Second thing is, they are saying Charter but they are targeting only one thing, the hijab! All the examples are about one thing, whenever there is a debate, the hijab. Is it really a Charter for religious symbols or is it just for the Muslims? I know a Canadian who is born and brought up here, her parents are from Lebanon, she is a professor and wears the hijab. Someone said to her ‘You just go back home!’. What does that mean? Canada is always asking for more immigrants but there is a big contradiction between what they say and what is reality....Before, we did not have this, now we are insulted on the streets. I don’t know much about the politics of Quebec but they try always to follow what France is doing. Ontario, as a reaction to Quebec said to the Muslim community ‘We don’t judge you by what is *on* your head but what is *in* it!’” ..When immigrants come from Africa they go to Quebec because of the language. I know some of my friends who go to Montreal because there is a network who will help them. This time when I was traveling back from Algeria, I met a family in the airport migrating to Canada. I told them, don’t stay in Quebec, go somewhere else in Canada. They are coming here for a better life for their family but they (Quebec) don’t want immigrants to bring their culture.” When asked if she would do things differently in hindsight, her response was: “I would do the same thing. It was my decision. It took a year to do it. I have no regrets at all. Maybe the regret is that I did not do it sooner!”

Discussion

In the increasingly multicultural and multi-faith population of Canada, employers need to be sensitive to requests for religious accommodation just as they would be sensitive to accommodating disabilities, sexual orientation, age and other kinds of diversity in the workplace. Well-educated, professional, modern hijabi women who choose to wear the hijab based on their own strength of religious values and conviction are demanding workplace accommodations using their agency and voice to challenge the widely prevalent negative and oppressive stereotypes of muslim women, enriching the debate on equality, individual rights and freedoms in Canada. These two hijabi women’s stories indicate that there are modern educated, professional hijabi women who are choosing to wear the hijab of their own free will despite facing challenges in Canadian society and the workplace. They are convinced there is no evidence that religious observance by wearing outward symbols, such as the hijab, is disruptive to organizational life, employee productivity or effectiveness. Arguing that the value that the hijab, as a religious symbol, brings into the workplace is that of modesty and such diversity of religious beliefs and practices should be accommodated in the Canadian workplace.

This paper has contributed to the debate on religious accommodation in the Canadian workplace which has been on the increase in recent years as diverse immigrants are beginning to exercise their rights in living and working in Canada as their adopted country. These results are from the perspective of hijabi women giving a point of view of those central to the issue of religious accommodation in the two Canadian provinces of Ontario and Quebec, highlighting the divergence in the extreme image and message being sent out to immigrants in Canada about their job prospects in the two provinces and will no doubt influence their decision over where to live, work and raise a family. There may be other stories and experiences, undoubtedly, but the ones presented here are with the hope of other voices joining-in on future research projects. The theoretical and practical implications are pertinent to cultural values, political policies, and societal change with important strategic human

resource management strategies for practical and successful implementation of religious accommodation in organizations. The issue is not just Canadian but has worldwide implications and practical applications.

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Back in the line: A diversity management case study to involve blue collars with functional limitations

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Abstract

The presence of pathology in blue collars – mainly due to repetitive tasks - determines a serious problem for the organization safety, affecting company's performances and organizational climate. After redesigning its main production lines, Electrolux Italia tested 'Accomodation RAL', a new procedure of re-integration in line of blue collars with functional limitation. The objective of the research is to detect the psychosocial impact of this kind of Diversity Management (DM) strategy and to measure its efficacy.

The peculiarity of the study is to underline the strategic role of the worker's involvement in the processes of change. The assumption of responsibilities, the research of meaning in its own job and role, the perception of a procedure based on the workers' involvement result significant related to safety perception and performance.

The huge literature about blue collars and the psychosocial factors about the work in line is mainly dedicated to monotony, stress, muscle-skeletal disorders. Rare are yet the researches (Rivilis et al., 2008) which examine the efficacy of involvement in DM. The results highlight the necessity to propose (again) the centrality of the human being in the industrial contest.

Introduction

The presence of pathology in blue collars – mainly due to repetitive tasks - carries serious problems to the organization safety, affecting company's performances and organizational climate. In order to solve these problems, Electrolux decided to implement a new strategy in HRM, through the valorization of the differences. This method belongs to Diversity Management (DM) and consists in a way to know, manage and valorize the difference among the workers in order to reduce the discrimination and with the aim to avoid a decrease in productivity, improve organizational climate and well-being at work (Gilbert et al, 1999). There are two main categories of diversity considered by the DM: the first one refers to the social category diversity (Van Knieppenbergh et al, 2004), and includes age, gender, ethnic origin, skills/mental characteristics, which are part of an individual's birthright and cannot be modified. The second one focuses on the diversity in functional and informational terms and includes the job characteristics, the workstation, the role inside the organization.

Adopting the DM approach means to recognize the differences and manage them actively in order to increment the possibility of success of the whole organization.

As Ivancevich and Gilbert (2000) suggest, this approach is based on the involvement of different professionals in research and management in order to use the different competencies to create a program of DM tailored on the organization, with a clear planning of the activities to put in act to manage the specific situation. If the DM coincides with the HR policy in the

organization, it represents a new way to consider the people in the organization, their well-being and their job satisfaction.

Through the DM approach the organization creates the condition to valorize the people and to encourage them in the expression of their potentiality, it is a way to valorize both the worker and the organization.

The main studies about DM focus on the impact of racial and gender diversity (Richard et al 2013), the discrimination in the organization (Lieberman et al, 2013), dedicating attention on the social diversity; instead, there is a lack of studies dedicated to the diversity in terms of job characteristic.

The present research aims to verify the impact of a DM approach in a washing machine plant in order to include workers with physical pathology in the production line, through a longitudinal analysis of psychosocial factors before and after an ergonomic intervention.

In the scientific literature, there are a huge of studies about participatory ergonomics (PE) concerning health risk factors and musculoskeletal work related disorders (Jensen, 1997; Nagamachi, 1995; Wilson and Haines, 1997), where PE interventions or programs are often proposed to reduce this kind of problems.

The most common definition of PE belongs to Wilson and Haines (1997) and describes PE as “the involvement of people in planning and controlling a significant amount of their own work activities, with sufficient knowledge and power to influence both processes and outcomes in order to achieve desirable goals” (pp. 490–513). Participatory methods are increasingly applied in improving ergonomic aspects of work and workplace; the benefits arising from participatory methods have been discussed in literature particularly in terms of PE (Kogi, 2006).

Case Study

This study took place in Electrolux (a Swedish multinational household and professional appliances manufacturer) in the site of Porcia (Italy) dedicated to washing machines production.

The research began in 2009: before the plant re-engineering, the management decided to study a strategy to re-collocate blue collars with physical pathology.

Indeed, up to 2009, this plant registered an increasing number of blue collars with musculoskeletal disorders (MSD), mainly due to repetitive tasks. These MSD workers had been placed out of the production’s line to perform simple tasks not unsafe for the disease, and with a very low productivity rate, then.

Therefore, the presence of an increasing number of MSD in blue collars determined a serious problem for the organization management, affecting the performances of the company and organizational climate. Diversity Management was used to re integrate MSD workers in the line, considering their differences as a strength in the plant redesign.

The model of intervention was called “Accomodation RAL”, to indicate a new procedure of re-integration in line of MSD blue collars based on the Diversity Management principles.

Accommodation RAL is based on the worker's active involvement in the decision process to define the ergonomic intervention, to guarantee an open and tutelary comparison between worker and management, and to give to the worker the possibility to choose among a shortlist of job positions, the most proper to the pathology. To ensure that the position is suitable, the approach foresees the support of video to analyze the action in the workstation and the continuous monitoring in time of the re-introduction.

The team is composed of plant management, medical staff, university researchers and an ergonomist in order to identify all the suitable workstations for each MSD worker. Each MSD worker is called to join the team and to discuss about the ergonomic improvement of the position, using video media and technical indicators to verify that it is not dangerous for the pathology. Each worker has the possibility to discuss its own situation in the team, and also to try the new position for a period of time. The team takes care to improve with ergonomic changes the position, following MSD worker suggestions in testing it. The team works –in multiple sessions - until the MSD worker declares to be satisfied about the new position.

In the observed experience, team sessions were around 45 minutes long and the number of sessions for each worker varied from 1 to 7, until the worker accepted the new position.

Therefore, the objective of the research is to detect the impact of the re-integration intervention (DM) on several psychosocial variables, on productivity and, on the work related injuries.

Research design and methods

The psychosocial variables chosen to monitor the DM efficacy are: job satisfaction, usefulness of the role, perceived fatigue, perceived repetitiveness, work safety, company attention to safety.

Each dimension was surveyed via a single item in a 5 level Likert scale followed by some open questions to collect qualitative data.

Two cycles of **interviews** were conducted inside Electrolux plant, by university researchers, in a private office located in the production building. Workers were invited by the line manager to move from the workstation to the office to have an interview for academic research. After a brief presentation, interviewer ensured workers about the use of the collected data (to be used only in aggregate composition, with the formal guarantee to not be recognized) and followed the same schema for each person. One researcher led the interview, a second one wrote down the quantitative and qualitative data. At the end, the worker had the possibility to read the answers. Interviews were around 20 minutes long and the most of the participants actively collaborated in answering.

Exploratory and descriptive analyses of Likert scale-based ordinal data have been addressed by boxplots, and summarized by medians and quartiles. The longitudinal research design permits to compare the psychosocial variables before and after the intervention. Due to the fact that the samples involved only partially overlaps, i.e. the samples are neither independent nor paired, approximate p-values can be obtained assessing by Kolmogorov and Smirnov test the bootstrapped resampled distributions of differences in responses. To assess the role of the covariates as predictors in job satisfaction, at a significance level of 0.05, approximate p-

values can be obtained by a linear model, performing multiple comparisons by means of Tukey HSD test with sandwich variance-covariance estimation (Hothorn et al. 2008). All computations were performed by R open source package (R, 2012).

Sample

In a first phase of the study, a sample of 76 blue collars both MSD (39) and healthy (37) had been interviewed to define their perception about the workplace and to create a first assessment of the psychosocial variables.

In 2013, after the re-integration in line of the workers, a new sample of blue collars MSD and healthy had been interviewed, monitoring the same psychosocial factors of the previous phase, their perception about the Accomodation RAL application and about the reintegration in line.

The second interviewed sample was composed by 31 MSD workers reintroduced through Accomodation Ral, 13 healthy workers and a control group of 6 MSD workers reintroduced without Accomodation Ral procedure. This *not planned* control group arose for a choice of the line manager not to use the Accomodation Ral for some MSD workers. Although it was not planned in the research design, researchers realized it was an interesting group to survey to verify possible differences between MSD workers re-introduced via Accomodation Ral or without it.

Results and discussion

The research design permits to compare the psychosocial variables before and after the intervention.

The first difference between pre and post intervention stays in the perceived fatigue level, in the first phase of the research the situation between MSD workers and healthy workers is quite homogeneous (Median 3 for both categories of workers) (Figure 1). In 2013 the situation is drastically changed, there is a difference in the median value among the three categories: the healthy workers have increased the level of fatigue (Median 4), meanwhile the situation remains stable for MSD workers (Median 3). The substantial difference appears observing the MSD workers not involved in Accomodation RAL: they presents median value between 4 and 5 with a statistically significant difference ($p = 0,0313$ Turkey HSD test).

From the MSD worker point of view, the re-introduction in line means to maintain the rhythm of the line, so that an increase of fatigue could be expected: data show that workers involved via Accomodation RAL do not perceive more fatigue; instead, workers not involved in the DM approach feel more stressed by the line.

In 2009, data show a spread distribution about perceived safety scores; in 2013, all the groups show an increase, obtaining a median value of 5. There are no significant differences among the groups, and the level could indicate that a DM strategy affects all the workplace and not just the persons directly involved in it.

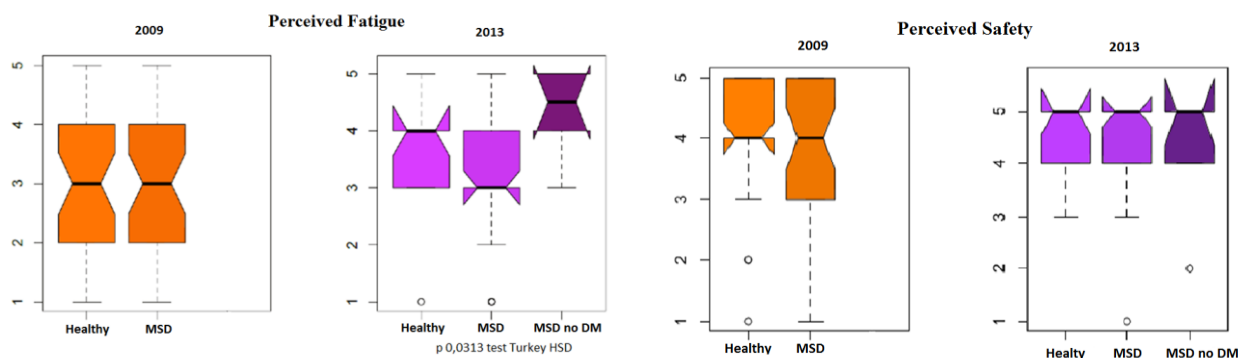


Figure 1. boxplots of Perceived Fatigue and Perceived Safety, comparing 2009 (orange) and 2013 (purple) in Healthy and MSD workers, MSD workers integrated without DM

Moreover, in 2009, there was a significant difference (Kolmogorov and Smirnov, $p < 0.001$) between the healthy workers (Median 5) and the MSD workers (Median 4) in declaring that the company protects the safety of workers. The MSD worker had less confidence in the company, because the most of the diseases derived by the work in line. In 2013, after the intervention, the attribution to the company role highly grew: the three groups have a median value at the maximum of the scale (5), confirming that Accomodation Ral was perceived as a strategy to prevent disease and to increase safety in the workplace, not just a way to increase productivity (Figure 2).

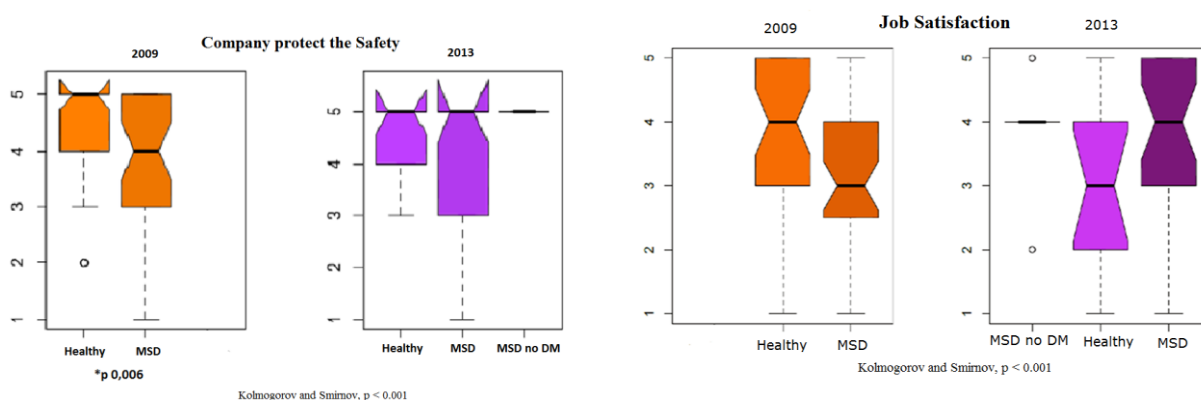


Figure 2. boxplots of Company protect Safety and Job Satisfaction, comparing 2009 (orange) and 2013 (purple) in Healthy and MSD workers, MSD workers integrated without DM.

Considering job satisfaction level: in 2009 the healthy workers (Median 4) were more satisfied than the MSD workers (Median 3); in 2013 the situation looks different because MSD workers (Median 4) after Accomodation RAL are more satisfied than the healthy workers (Median 3). The difference results statistically significant (Kolmogorov and Smirnov, $p < 0.001$) between pre and post intervention.

It results of a certain interest to see what has changed during the two phases (2009 – 2013) in the job satisfaction predictors. We performed two linear regression models to understand the predictively impact of some covariates of job satisfaction: perceived usefulness, repetitiveness, work safety.

In 2008 the job satisfaction was significantly predicted ($p = 0.027$) by the work safety, while in 2013 thanks to the broader growth of the level of perceived safety, the job satisfaction results linked ($p = 0.013$) only to the perceived usefulness. Table 1 reports such changes. One

possible interpretation stays in the highest level of work safety perceived in 2013. It seems that work safety as became so spread in Electrolux to not be anymore considered a factor able to explain differences in job satisfaction. It has been considered a big result for the company in terms of organizational culture, to be aware of the effect of a huge amount of investments and actions dedicated on work safety in the last 5 years.

2009	Estimate	Std. Error	t value	p value
(Intercept)	2.28	0.85	2.69	0.009 **
usefulness	0.09	0.12	0.79	0.431
repetitiveness	-0.16	0.09	-1.69	0.095
work safety	0.30	0.13	2.26	0.027*

Multiple R squared 0.19, $p = 0.002$

2013	Estimate	Std. Error	t value	p value
(Intercept)	0.93	1.35	0.69	0.493
usefulness	0.56	0.22	2.62	0.013*
repetitiveness	-0.29	0.15	-1.93	0.062
work safety	0.28	0.24	1.18	0.247

Multiple R squared 0.29, $p = 0.009$

Table 1. linear regression models of job satisfaction versus usefulness, repetitiveness, work safety, in 2009 and 2013.

The perception of the workers about the Accomodation Ral application confirms the data obtained by the psychosocial factors; from the interview dialogues, people declared to feel listened, involved, considered, understood; rare are feelings like intimidated, forced or ignored. They defined the Accomodation Ral experience like human and kind, a possibility of open comparison with management about the own situation. People declare to feel understood. MSD workers perceived themselves like useful in their job (median 4).

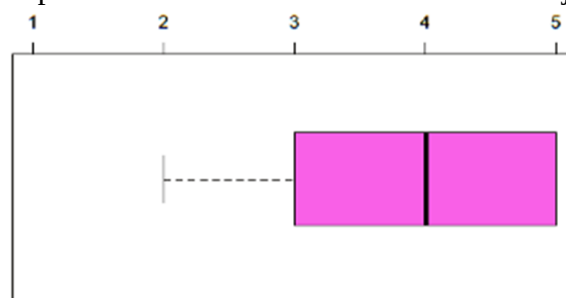


Figure 3. boxplot showing Usefulness score for MSD workers.

This study reveals that the involvement of the single worker in a team in order to discuss its own workstation is functional, this action finds confirm in the analyzed data. Indeed, they show an increase in terms of job satisfaction and of perceived safety among the MSD workers but also in terms of usefulness, people involved in the Accomodation RAL, after the intervention feels useful in their workplace (Figure 3).

Conclusions and Limitations

The data collection by interviews permit to the researchers to analyze both quantitative data and qualitative data to recognize the effectiveness of the intervention and to understand in deep the situation.

Although this study could be not properly fit in DM strategies, it has to be underlined that Accomodation Ral represented, for Electrolux, the first implementation of a DM strategy inside the HRM: a first step to apply DM in the company.

Accomodation Ral can be considered - following the suggestions by Van Knieppenberget al, (2004) - in the section of diversity deriving by functional and informational terms. Workers, that for musculoskeletal disorders need special attention inside the organization, can be considered as a weak or a strength in terms of HRM. Before Accomodation Ral, these MSD persons worked in a separate area of the plant, with low production level and with a low consideration among blue collars: they were perceived as a weak and their self-perception was linked to be damaged workers. In applying Accomodation Ral, MSD workers have been involved in the decision making process to find a new workstation, considering ergonomic factors, where they can be productive again, with no damage for their health and being perceived as part of the plant, again.

The empirical data collected during the longitudinal study confirm that considering MSD workers for their peculiarity, respecting their health limitation, involving them in the ergonomic modification to their workstation, taking care of their well-being, the company obtains results in terms of both productivity and workers involvement.

Indeed, the increase of the job satisfaction and the decrease of the perceived fatigue among the MSD workers due to the Accomodation RAL, underline that a DM approach acts on different fields: it gives to the workers the possibility to feel considered and listened inside the organization, the involvement of the workers in the identification of a workstation not unsafe for the pathology increases the job satisfaction (65% of the workers evaluated the experience of Accomodation RAL as positive). Moreover, the pertinence of the workstation decreases the perceived fatigue.

The change in the perception of work safety from 2009 to 2013 of the MSD workers shows an increase of trust in the company, mainly due to the fact that MSD workers recognize that the company takes care of their health and respects their pathology.

A first limitation is due to the single plant study. Accomodation RAL as strategy to implement Diversity Management has been applied and study only in Electrolux plant and it would be necessary to repeat other studies in different companies to generalize results.

Researchers are aware that interview method is time consuming and could appear too expensive to be applied in this kind of research, although it permits to go in deep in data collection and to reduce the misunderstanding in surveying psychological constructs only via quantitative scale. It allows to create a confidential climate during the interview, to clarify ambiguous interpretation of items and to explore in deep possible unplanned situation.

On the other side, longitudinal studies are very rare in literature, and it is not easy to compare results with other similar experiences.

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Working after 75: Who, How and Why?

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Abstract

Thirty one participants aged 75 and over, who are still engaged in some form of paid employment, were interviewed on the type of work they undertook, the approximate hours worked each week, how they gained their employment, why they continued to work, and what they perceived as the benefits and drawbacks of working. Results indicated participants scored highly on measures of human capital, occupied jobs where the supply of skilled labour was small and the demand was high, were well networked, in good health, above average in their proactive approach, and had already established reputations in their field.

Positive outcomes reported in order of priority were psychological factors, such as an opportunity to exercise skills, substantial autonomy to craft their own ways of working and confirmation of professional identity and continued competence, followed by social factors, such as meeting people and financial factors. Few mentioned any drawbacks. An unexpected benefit was that working contributed to their maintaining their good health.

Despite ageing being associated with perceptions of deterioration, both physically and mentally, a small yet growing proportion of the population is delighted to remain in the workforce, albeit in a reduced capacity, enjoys being still able to contribute and relishes the opportunity working provides them to enjoy a positive stream of psychological benefits.

Introduction

The workforce restructuring that has characterised the last decade of the twentieth century had more or less stabilised by the time of the global financial crisis in 2008. In most developed economies this has led to a situation where early retirement had become less prevalent (ABS, 2011), and significantly more employees are now seeking to remain working for longer. Simultaneous ageing of populations in most developed economies, coupled with beliefs that this will be accompanied by an ageing workforce, has convinced many governments to think in terms of extending the period at which older workers become eligible for aged pensions (Jorgenson and Taylor, 2008). Studies that have been conducted of those who do subsequently manage to remain working suggest there are three main streams of benefit and value likely to accrue to the incumbent, namely psychological, social and financial (Davies and Cartwright, 2011). Research to date, however, has largely focused on those aged 60-75 and these data would seem to suggest that remaining in the workforce might mainly be attractive for those employees who enjoy status, and autonomy in their job, and identify strongly with their work role (Vickerstaff and Cox 2005; Davies and Cartwright, 2011). Nonetheless there are still many other individuals aged 60-75 whose job experiences may fail to deliver such attractive psychological outcomes and whose major reasons for continuing to work are largely economic (Seongzu and Feldman, 2000; Smyer and Pitt-Catsouphtes, 2007). The majority of working individuals aged 60-75, who opt to continue working would appear to fall into these two groups with members of the first group working to maintain the stream of psychological benefits they received (Schlosser, Zini & Armstrong-Sassen (2011); Flynn (2009) and members of the second group largely driven by their economic need for a working income to meet their lifestyle demands (Seongsu & Feldman, 2000). Data about the aspirations of those approaching 60-75 seeking to continue in the workforce after they reach their sixties, confirms the continued dominance of these two groups. However data regarding experiences of those from this cohort, who do succeed in their quest to continue to work, are

far scarcer than those still seeking to work, though would appear to add a further dimension of social benefits (Desmette and Gaillard, 2008; Winkelmann-Gleed, 2012). Winkelmann-Gleed's analysis of the situation, for example, found individuals were more likely to choose to remain working if they were to experience a more inclusive workplace culture that demonstrated positive attitudes towards older employees and thus made it more attractive for them to continue working and that expanding the prevalence of such social benefits might potentially swell the numbers opting for this alternative.

We know little about those still working after they turn 75. Australian statistics indicate only 2% of the working population are aged over seventy and by far the majority of these are aged between 70 and 75. Do they reflect similar experiences to their younger counterparts in that their numbers are dominated by those seeking psychological or financial benefits or by this even older age have their reasons changed, and if so, how? What about their skills as a measure of human capital? Have they remained up to date and if so what practices have been followed to ensure their skills remain valuable? Why and how do they succeed in securing and keeping employment?

Research Methodology

This research reports on a small group of individuals over 75 who have continued to occupy productive positions in the Australian labour force. It reports interview information on the type of work being undertaken, how the job was obtained, the nature of the work effort, why the participant wanted to remain in the workforce and what they perceive as the benefits and potential downsides arising from this decision. Thirty one people were interviewed, sixteen men and fifteen women, with the majority aged between 75 and 85 though one man and one woman were aged over 90. All but five worked less than a full week with the overwhelming majority working the equivalent of three full days. A small minority only worked the equivalent of a few hours each week with other participants interspersing full time weeks with work free weeks, being largely either employed as casual staff during busy periods, or alternatively being employed in seasonal tasks such as examinations. Their conditions of employment ranged from a minority being self-employed, a small number in their own business, as a contractor who undertook specific assignments for one or more employers, or as a casual or part time employee. Participants were interviewed either at their place of work or at home depending on their preference and location. All interviews were recorded and the content later imported into NVivo 10 and analysed to discover major themes concerning their experiences as listed above.

Qualifications and Type of Jobs Undertaken

The sample is dominated by participants from the professional/managerial type employment categories. All but two held some type of post-secondary qualification with several holding further post graduate qualifications in their professional field. Whatever their field, their work could be described as highly skilled, and they occupied jobs where demand for capable reliable practitioners far exceeded the supply. A significant number were employed in niche type positions, where only they, or a handful of other people in the industry, could perform the job to the standard demanded without extended training.

Of those who were working for an employer, few had needed to search for work. Many were either now working for their former full time employer in a part time capacity or as a contractor, or alternatively they had been directly head-hunted by their present employer

through tight professional networks. Those who were self-employed were working in established businesses they had owned for several years and had simply chosen not to retire yet. Both of the over nineties worked for their children who were now running the established family business and needed someone trustworthy to manage things in their inevitable absences. A minority, however, were employed in traditional large public sector style organisations, but continuing to occupy jobs they had obtained several years earlier and from which they had not retired. A small number held jobs that only took a few days or hours each week to do and did not require a full time occupant. Table 1 below summarises these data.

Table 1. Sample statistics

Table 1: Sample statistics

Age	75-80		81-90		91+	
	21		8		2	
Gender	MALE			FEMALE		
	16			15		
Occupation	Professional/Managerial			Practitioner		
	22			9		
Highest Qualification	Post Graduate		Graduate		Post Secondary	
	5		20		6	
Typical Weekly Hours	Less than 5	5-15 hours		20-40 hours		40+ hours
	8	14		7		2

Type of Work Undertaken

Tasks undertaken were largely specialised requiring skills honed over several years of experience. These skills ranged from specialised knowledge of the history of the operations, specialised language skills or knowledge specific to the operation of the tasks undertaken, specialised knowledge about the technical aspects of the task, specialised networking connections within their professional organisations that enabled projects to be completed earlier or cheaper and specialised design or creative skills that seemed to remain current within their chosen field.

The Job Demands

With one exception, a female participant employed part time in aged care, none occupied jobs that were above average in their physical demands though all occupied jobs that were mentally and psychologically demanding. Their jobs required broad knowledge of their speciality, an ability to analyse complex issues sometimes involving substantive sums of money, provide a different or unusual perspective on common matters, generate creative, often unique inputs, researching alternative responses to presenting circumstances, and sometimes making split second decisions based on their specialised knowledge. They saw themselves as task experts in their chosen field, with a wealth of knowledge both current and historical who would deliver their tasks without flaws, on time, on budget and were always reliable. They were highly organised, and generally cultivated a professional persona whilst at work. Outside working hours the majority led busy social lives regularly interacting with friends and family.

Benefits from Continuing to Work

Participant answers as to why they continued to work indicated a dominance of psychological benefits, followed by social benefits, followed by financial benefits. Without exception all

relished the stream of psychological benefits and placed this first among the benefits they perceived they received from working, the most frequently mentioned being “keeping the brain active”, followed by a chance to exercise their skills and have them acknowledged, confirmation that their professional identity was still valued, making a difference in their chosen field, and providing input that others, such as their employer or their clients valued. Psychological benefits were followed by social benefits, such as maintaining old friends or making new ones through working; and financial benefits, whereby the money earned enabled them to live without having to watch every penny of expenditure. Female participants generally placed a higher value on social contacts than male respondents and were more likely to spontaneously mention the financial benefits as a small proportion of these were in receipt of a part pension from the government. Even though all subjects believed the psychological benefits substantively outweighed any others, male participants were more likely to strongly endorse the opportunity that working provided to exercise their skills, to keep themselves up to date and have their contribution acknowledged and applauded.

For all participants working reaffirmed their identity as a competent individual. It complimented their perception that they were still someone who mattered. They had not withered. Working provided them with a sense of worth and value in society, within their family and within their immediate group of friends. It provided purpose to their lives.

The downside of continuing to work

No-one spontaneously mentioned any downsides and all had to be prompted to consider what these might be. Once prompted some mentioned not having enough time to do everything they had to do with the uncompleted tasks largely non work related. Many, with domestic responsibilities, worked long hours after they returned home each day to maintain life style commitments such as shopping, or other forms of housework. On line options were especially popular among this group to reduce the time needed to be allocated to non-work activities.

Three of the female respondents, who were in receipt of a part pension, mentioned having to report their earnings to Centrelink to ensure their pension income was not affected was a real downside for them. Surprisingly no-one mentioned any issues to do with the intrusion of working into family; rather the problems mentioned were more likely to relate to the intrusion of domestic tasks into their working lives. The small proportion of those who worked full time reported that they rarely went to bed until late, staying up to attend to both work and non-work activities once they returned home.

Health Matters

Physically all participants presented well. They appeared to experience few visible signs of failing health or physical problems, most looked younger than their years, were well groomed, and spoke fluently and articulately with an excellent command of language. Even the two participants, who were in their nineties, could easily be mistaken for people far younger. Without exception all participants assessed their health as in the top 10% of individuals in their own age group and when questioned mentioned neither serious illnesses nor surgery during the previous ten years. They were active, many played sport, they regularly undertook physical domestic tasks such as gardening, and appeared to enjoy busy social lives outside their working hours.

What is interesting to speculate here is to what extent their perceived excellent health is an input into their decision to continue working or an outcome from continuing to work, an issue to be taken up further later in the paper.

Discussion

These findings indicate that those who continue to work after they turn 75 have some unique characteristics. First they have been educated to an above average level. With only two exceptions all had undertaken some form of post-secondary education and several had completed post graduate education. The finding confirms the work of Bartless (2013) in the United States who was able to show how older individuals who succeed in remaining employed have higher level qualifications than their unemployed contemporaries. Nonetheless this issue does suggest a need for additional information that might further clarify the situation of this group as compared with younger samples aged 60-75 where there a higher proportion of people claim their need for income as a major reason underpinning their continued employment. Certainly in Australia, anyone over 75 living in Australia and without any other form of income, is entitled to receive an aged pension, whereas the younger group between 60-75 contains many individuals without pension entitlement which often does not commence until after a person turns 65. However by the time they have reached 75, they no longer need to work to receive an income or to have access to the associated supplementary benefits, their needs are fewer and their choice of whether or not to work is rarely an economic one. Furthermore should their physical capacities have declined, they may be less likely to occupy jobs that are physically demanding leaving opportunities for working open largely to the more mentally demanding occupations that require further education.

Secondly they work in fields where demand for the kind of services they provide exceeds the supply of available talent. Thirdly they have long established reputations and active network connections in their field. They are specialists in what they do and already have substantive experience and confirmation of their competence. They enjoy the challenge of solving problems, frequently offering creative approaches, providing mentoring advice, with many working additional hours above those for which they are paid. Working and the continued acknowledgment of competence, reaffirms their identity and provides them with evidence that they are still valuable. They believe their human capital value is high in terms of the four dimensions of capital proposed by Peterson and Striker (2005), namely psychological, intellectual, emotional and social capital.

For this group working clearly fulfils a need that would not be filled as easily through community based leisure activities or forms of voluntary work, though some did undertake voluntary work over and above their employment. Most, however, preferred to work in a capacity that utilised their existing work skills and reinforced their scarcity value. Often such challenges involved tasks they believed only they might do as well and thus served to confirm their competence. Being still able to earn was rated by them as an important indicator of their personal worth and was further reinforced whenever employers attached a financial payment to their output. As suggested by Smyer and Pitt-Catsouphes (2007) being paid for working represented an indicator of their competence, accomplishment and contribution to society. Nonetheless the income they received was frequently not evaluated in terms of the amount of the financial component but more that it represented value to the authority responsible for their income. In the words of one participant, a male aged 75, *“They pay me well. And why not? After all I’m saying them thousands. If it weren’t for me, they simply would not be able*

to do things as cheaply or as efficiently as they do. It's my knowledge that makes it possible for them to succeed."

Further confirmation of their value was provided by the ease each experienced in securing paid work at a time when the economy was far from vibrant. For many the offer of work came to them, they did not have either to look or compete for it. Either they remained in their previous full time employment, some at the same level of their previous full time participation or others at a reduced level of participation, or they had been approached through their personal network to undertake related employment for a different employer or several different employers as a contractor. Many found themselves able to pick and choose between offers and not having to scramble to locate opportunities. They explained their situation as fortunate given working was their preferred choice of activity. They worked because they wanted to, because they enjoyed it.

However simply securing employment and receiving positive feedback was not enough for some participants, as another highly valued component contributing to their enjoyment was the opportunity to craft their own job albeit in different ways. For some this meant designing the way in which the work was done, for others it meant working where, when and how they felt most comfortable.

Crafting was undertaken by almost all the sample. Most common was autonomy in choosing how to do the work, followed by negotiating a delivery date for the work undertaken then scheduling it around other commitments. If self-employed or a contractor the pricing of jobs was within their jurisdiction. Many employees were able to choose whether to work at home or on the employer's premises and occasionally who they might work with if they were part of a team. They seemed to understand the value of their skill scarcity and used this to either negotiate or assume additional autonomy of value to them.

As Brickson (2011) has inferred from her own experience, the opportunity for crafting provides significant potential personal benefits in that it contributes to sustained mental health and increases both work and life satisfaction. Bakker, Tims and Derks (2012) also point out that such activities are more likely to be adopted by individuals who score highly in measures of human capital such as the members of this sample.

Without much doubt they set the stage for high levels of work engagement and consequent outcomes that lead to positive psychological experiences. Their ease in remaining employed under their own terms and the opportunities their work provides for job crafting, autonomy, challenging problems to resolve, and repeated confirmation of their value all combine to make continuing in the workplace attractive to this sample. Working offers benefits well beyond what they can find in alternate activities. It is no wonder given the strength of their need to engage, that they grasp the opportunity and enjoy the positive reinforcement that working provides.

A Model of Working after 75

The model developed from this research has been put together in three parts. Part one refers to who might succeed in finding work they enjoy after they turn 75. Part two refers to the nature of the work environment that acts to keep such older staff positively engaged and keen to remain. Part three refers to practices organisations might employ to select and retain these older employees.

Part One

Certain previously identified prerequisites would seem essential before someone over 75 has the opportunity to work. First they need either above average qualifications or some form of controlled monopoly over the skills or products they offer. Secondly they would appear to require what Bakker, Tims and Derks (2012) and Kira, van Eijgatten and Balkin (2010) refer to as a proactive personality; that is, they are individuals “who actively influence their own environment” (Bakker, Timms and Derks, p1360). Furthermore they need to possess what Petersen and Spiker (2005) refer to as high levels of human capital in terms of their designated four dimensions of intellectual, psychological, social and emotional capital. This research has not only verified these criteria listed above, it has added three more; namely that they need to be well networked into their chosen field, possess skills that are not only needed but are difficult to find elsewhere, and that they need to be in good health.

Though such attributes would stand any prospective worker in good stead and virtually guarantee employment, they are especially relevant for this age group given the prevalence of negative images associated with the employment of older people in the business community (Maurer, Barbeite, Weiss and Lippstreu, 2008; Buyens, Dijk, Dewilde and De Vos, 2009; BooneJames, McKechnie, Swanberg and Besen, 2014). Courage to overcome such negative stereotypes and energy to continue to be part of the workplace, backed up by a history of accomplishment are the defenses open to those seeking to remain employed. They enable them to stand out and help counteract the effect of such negative beliefs.

Part Two

A second feature of a model would be to consider the experiences that act to keep them working. These data affirm the necessity for positive psychological outcomes as they act to engage the employee, and reinforce the benefits that working delivers to them. Most frequently mentioned among the benefits was that working provides stimulus for the brain, followed by the opportunities to apply skills, be still part of what they consider important, and receive feedback on competence. Older people especially thrived on any feedback that affirms both their value to an employer and their worth to themselves (Vuori, San and Kira, 2012).

Secondly working provides social benefits and finally financial benefits, though as already mentioned the value attributed to financial outcomes for this group is far lower than for other age groups in the workplace. It was not an important driver of their engagement but rather a measure of their value.

Part Three

Though no data in the project was collected directly from employers, nevertheless one can draw inferences from the participants’ remarks about what mattered to them. Chief among the benefits that need to be provided are opportunities for the worker to “do their own thing”, to exercise substantive autonomy in crafting either the conditions under which the work is undertaken, or how it is undertaken. All participants appeared to relish these opportunities, which to them designated their professionalism, reinforced their reliability, and signified their status as someone who stood out and did not require supervision. Such practices acted to affirm their value, and consequently they enjoyed relatively high levels of self-esteem. Employers should be encouraged to gradually expand the granting of autonomy to their older experienced workers as these are the people who already know and understand the tasks they are doing and acknowledging that they only require minimal supervision is likely to retain their commitment. The model is illustrated in the figure 1.

Figure 1. Model of working after 75

Part One Personal Requirements	Part Two Outcomes	Part Three Work Requirements
1. Above Average Qualifications	1. Positive Psychological Outcomes e.g. Stimulus for the Brain	1. Autonomy to Design Job
2. Proactive Personality	2. Social Outcomes e.g. Make friends	2. Opportunities for Job Crafting
3. High Levels of Human Capital	3. Financial Outcomes e.g. Income Augmentation	3. Positive Feedback on Contribution, Worth and Value
4. History of Accomplishments		
5. Well Networked		
6. Above Average Health		

Towards the end of the interview participants were asked a couple of questions concerning their future plans. The first question asked how much longer they intended to keep working and typical answers indicated no one would admit to any immediate plans to retire. Some said “I’d have to go if my health takes a sudden decline”, but the universal response was either “as long as I can” or “as long as they want me”. Certainly there were no thoughts on their part to go at a specific future time but more that any departure would be dictated by circumstances outside their immediate jurisdiction. The second question asked what advice they would offer to someone younger seeking guidance about whether or not to continue working if the opportunity were to arise. Again the answer was universal in the affirmative though a small number also cautioned that it is up to each individual to work out this type of decision within the parameters of their own situation with respect to family and other aspirations.

Overall the picture presented here is of a cohort for whom working is a valued experience through which they gain enrichment and maintain their positive perception of identity as an individual. Working offered valuable psychological outcomes, and provided challenges and experiences which, although similar to outcomes that might be available through participating in voluntary activities, were outcomes that were rated more highly as they were from people who mattered more to them. Working provided the approbation of their peers, and the confirmation of their contribution in the professional domain, which was in turn a key input into their identity.

The Important Role of Health

As mentioned above all participants self-assessed their health as being in the top 10% of their age group and reported they had experienced no major health issues or serious surgery in the previous ten years. The question immediately arises as to what extent good health is an enabling factor or a consequence of working. Good health was certainly required for some jobs participants occupied such as nursing, aged care, jobs requiring travel, but mostly the jobs undertaken did not demand high levels of physical input and could be undertaken by anyone with average physical ability.

While evidence abounds that ill health is associated with both a decline in the ability to work (Arnold and Edgar, 2006) and a decline in the desire to work (Brown and Vickerstaff, 2011), or that ill health can be exacerbated by a decline in work availability (Stansfeld, Woodley-Jones, Rasul, Head and Clarke, 2008) there is less evidence substantiating that good health is associated with willingness to work.

It is acknowledged that good health does contribute positively to enabling those who wish to work to do so, providing work is available. However once this issue began to emerge as potentially important in this study after some initial interviews had been completed, the question about the nature of the connection between their general health and working was directly raised with some 20 of the later participants. Most seemed to take their health for granted, and only when prompted did they credit their good health with the emergence of the opportunity that enabled their choice to continue to be part of the workforce. However several of the more articulate did comment on the health outcomes that working provided, though they considered it was the pleasures that working delivered to them rather than the work itself that was associated with their good health.

One participant, a male in his 80s stated: *Good health is both an input and an outcome. I need good health to do my job as expected. But working certainly helps me maintain it. If I didn't work, I'd be bored to tears and then maybe I'd get depressed and after that it's possible I'd soon fall over with something. I'd probably even begin to feel old and once I feel old then I am old and I'm susceptible to illness. While I continue to feel young and can see myself working with younger people that I'm part of the workforce then I'm far too busy to even think about getting ill.*

Clearly there would appear a relationship between continuing to work and perceived health for this sample. Nonetheless the extent to which good health in older people can be maintained through continuing to work requires much further investigation as good health appears to be associated with the psychological benefits of working, not simply being employed. Being able to work if one wants to helps maintain health but having a job that provides confirmation of value can offer significant added benefit.

Conclusion

Working does not appeal to everyone but for those to whom it does appeal and the opportunity arises it can provide a number of benefits. The doors are most likely to be open for those with established skills, established professional networks, established reputations, and both willingness and energy to continue working. If governments continue to pursue policies of seeking to keep the as many of the population as possible working beyond 65, then we need to understand far more about how to attract and maintain the engagement of older people in the workforce.

This research has pointed to the importance of providing opportunities for part time work to this age group, ensuring that the psychological benefits are attractive, facilitating positive social benefits and putting in place practices that consistently communicate that their contribution is valued. Further potential benefits to general health might also be possible in these circumstances.

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Are women really discriminated and receive lower income for equal work?

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Abstract

It is “common knowledge” that women are receiving lower pay for equal efforts. Yet, women have lower levels of job positions and spend fewer hours on-the-job. The purpose of this study was discovering whether the lower pay is explained by these factors or there is a hidden element of gender discrimination. A survey was conducted among employees, 1208 women and 430 men. We demonstrate that women are not discriminated in direct wage payment for equal jobs. Direct discrimination exists only in the lower ranks while women that achieved higher positions are not discriminated in relation to their direct salaries. Nevertheless, the study observed that even in the highest ranks, women are still receiving lower related fringe benefits

Introduction

More than half of the world's population is comprised of women. Despite this fact, in many cultures women have been treated like a minority group and have faced overt discrimination in various aspects of life, especially at work (Fisher, 1992; Heilman et al., 1992). During recent decades, this situation has been changing and overt discriminatory practices have been banned by law in many countries. Despite this legal support, women continue to occupy a relatively disadvantaged position in many organizations. They are concentrated in low paying low-status jobs (Fisher, 1992) and their average salary remains lower than that of men, even when engaged in the same occupations. It is argued that while overt barriers have largely disappeared, other subtle forces continue to operate. Across occupations in the U.S.A, women earn about seventy-six to eighty cents for every dollar earned by men (Johnston, 1998; Solis & Hall, 2009). The question remains whether this gap in average salaries is an outcome of discrimination or alternatively, it can be explained by other factors such as job rank, education, part-time employment and so on. Previously reported studies have reached contradictory findings. Lyness and Thompson (1997) compared male and female executives in a large company. They found that women supervised fewer subordinates, had more interruptions in their career and reported more obstacles in work. Yet, they did not differ from men colleagues in terms of salary and bonuses. The authors noted that these findings could be the result of the relatively high positions the sampled women reached, so that they have passed the “glass ceiling”. In contrast, a series of studies regarding salaries of agribusiness graduates found that there is a large and significant earning premium for men versus women having the same seniority and similar jobs (Harris et al., 2005; Preston, Broder and Almero, 1990; Broder and Deprey, 1985).

Some explanations for the existing gender gap in salaries were proposed in the literature. Goldin (1999) and Jackson et al. (1992) suggested that the gap could be due to either discrimination or to a self-selecting process whereby women preferred jobs of lower salaries but with more desirable other work conditions. Babcock and Laschever (2003) posited that women are averse to negotiating. Along the same line of thought, Krueger (2003) and Jackson et al. (1992) believed that women have a tendency to ask too little in opening offers and concede too quickly to counter-offers. While most of the previous research focused on the gap in wages, Wunnava and Ewing (2000) assessed the gap in fringe benefits as well. They found

that there is a positive union-benefits effect for women. In other words, belonging to a union increases the negotiation power of women.

In summary, results of prior studies are inconclusive. Accordingly, the purpose of this study is to clarify whether the observed lower income of women is explained by gender discrimination or as an outcome of other factors such as education, rank, and extent of employment, i.e., part time vs. full time.

To answer the above research question, we conducted an empirical study in Israel. The Israeli legislator passed in 1996 the Equal Payment Law which clarified that the right to equal payment includes not only direct salary but also fringe benefits. The motivation for this law were studies that showed that in organized (union) working places, the basic salary was equal regardless of gender, but men got more fringe benefits than women.

As a first step, we studied if the extent income differences in Israel between men and women still exist in spite of the law by studying recent national statistics that provide data by gender.

According to the Israeli Central Bureau of Statistics, in 2013 (March, 2014), 69% of the men participated in the work force while only 58% of the women did. The average weekly work-hours per working woman were 34 hours, as compared to 45.5 hours per working men. The average wage of women was 34% lower than the average wage for men. The resulted gap in per-hour wage between men and women was 15.5%. These figures indicate that the gap in income between men and women still exists.

Method

In a second step, we surveyed a sample of Israeli employees and studied the results by gender.

Sample Characteristics

A total of 1,638 female and male employees participated in the study. They were employed by 10 big business organizations in Israel from all major sectors. The employees represent all positions and ranks in these organizations. The external validity of the sample was confirmed by comparing it to the socio-demographic traits of the total employees in Israel. The sampling method was a stratified sampling, strata defined by gender. Seventy-four percent of the respondents were female (1,208) and 26% (430) males.

Forty seven percent were younger than 35 years, 48% were with age 35-55, and only 5% were older than 55. The family status of the participants was: 73% were leaving with spouse, 27% were one-parent families, divorced, or single. Forty six percent of the employees had 12 years or less of education, 17% had 13-14 equivalent years, and 38% had over 15 years of education.

Sixty seven percent described themselves as the main or co-main provider of the family. Fifty one percent had the lower ranks, 33% had intermediate ranks and 16% had the higher ranks.

Research Procedure

The respondents were approached at their place of employment. Instructions were given to the responsible persons of the research in the organizations to select participants randomly in each rank (strata of ranks). In order to ensure anonymity, each respondent was asked to complete the questionnaire, seal it in an empty envelope, and put it in a designated box.

Measures

The following variables were included in the questionnaire:

Working details: Seniority in the organization and in the current job, rank, working hours per week, part/full time job, number of subordinates, history of promotions, and participation in training programs.

Occupational payments: Basic salary and detailed information about 16 fringe benefits that are paid to selected employees in Israel.

Attitudes toward current work place: Importance and satisfaction attached to listed work attributes (Guiso et al., 2003; Harpaz, 1998), measured by a scale ranging 1-5 (1= not very important or not very satisfied, and 5= very important or very satisfied).

The role of working domain in the employee life: Traditional stereotypes about occupational gender roles and family duties (Guiso et al., 2003), measured by a 1-5 Likert scale (1= strongly disagree, 2= disagree, 3= neutral, 4= agree, 5= strongly agree).

The questionnaire also included personal data including Gender, age, religious identity, marital status, children, education and region of residence.

Data Analysis

The statistical package used in this study was SPSS. First, descriptive statistics and Independent-Samples T Test procedure comparing means for the two samples (defined by gender) were applied in order to find the impact of gender on work characteristics and work compensation. Then, linear regressions for women and men were performed in order to find the relative impacts of the study variables on the dependent variable: basic payment.

Results

Descriptive Analysis

Table 1 (next page) presents the frequencies by gender of some work characteristics that are assumed to influence wages and fringe benefits.

It can be seen that there is a big difference between women and men regarding work related factors: Men have higher education levels (62% with some higher education vs. 52%), are generally the main breadwinners (61% vs. 26%), have higher ranks at work (29% highest vs. 12), have more supervisory roles (52% vs. 28%), have less part time jobs (8% vs. 28%), and work for more hours (44+ hours 72% vs. 37%). No significant differences were found with regard to seniority at the organization or seniority at the specific job.

Table 1. Frequencies of work characteristics for women (N=1,208) and men (N=430)

		Women	Men
Education (years):*	Less than 11 years	12%	16%
	12 years	37%	22%
	13-14 years	16%	19%
	15+ years	36%	43%
Main breadwinner:*	and no-one else	26%	61%
	Together	37%	32%
Ranks at work:*	The lowest ranks	56%	37%
	The highest ranks	12%	29%
Subordinates:*	None	72%	48%
Age (years);**	Less than 34	49%	42%
	More than 55	4%	7%
Seniority in the organization:	Less than 2 years	29%	31%
	More than 20 years	8%	9%
	Part time job*	28%	8%
	Extra hours job	13%	29%
Weekly working hours:*	Less than 11	5%	4%
	11-20	4%	4%
	21-30	11%	1%
	31-43	42%	19%
	44+	37%	72%

*Gender differences in this table were found significant at the 0.000 level.

** Gender differences in this table were found significant at the 0.01 level.

Table 2 presents the frequencies of the researched variables- wages and fringe benefits by gender.

Table 2. Frequencies of payments for women (N=1,208) and men (N=430)

	Women	Men
Salary range(NIS):		
Less than 3000	14%	3%
3000-4000	27%	11%
4001-6000	26%	18%
6001-9000	17%	24%
9001-15000	11%	26%
15001+	5%	19%
Fringe benefits (received):		
Pension fund	61%	61%
One added monthly salary	31%	31%
Bonus	26%	25%
Company car	7%	27%
Transportation expenses	32%	48%
Cellular phone	12%	30%
Subsidized meals	28%	24%
Outside meals expenses	4%	10%
Free weekend hotel	20%	17%
Holiday gift	72%	67%

As can be seen in Table 2, there is a significant difference between women and men regarding their basic salaries. Forty one percent of the women employees receive less than 4000 shekel

per month compared to 14% men employees. However, only 16% of the women receive more than 9000 shekels per month compared to 45% of the men.

Considering fringe benefits, Table 2 demonstrates that there are inherently three groups of benefits. The first group is comprised of benefits that are typically included in agreements between trade unions and employers, such as contributions to pension funds, one month added salary (month thirteen) and performance bonuses. No differences were found between women and men in this group. The second group includes additional benefits that have real economic value or represent "status symbols" including a company owned car or participation of employer in covering transportation-related costs, company owned cellular phone and individual expenses reimbursement. There are significant differences in this group, as more men get these benefits. The third group includes benefits that represent employers' good-will such as subsidized meals, holiday gifts and employer-covered weekend in a hotel. No significant differences are found between men and women in these benefits. It can be concluded that men receive not only higher wages but also more lucrative benefits.

The observed significant differences between men and women in wages can be explained by the fact that men are working for more hours per week and are assigned to higher rank positions. Alternatively, these differences may result from discrimination. To assess the validity of discrimination in explaining this difference, we regress the wage by gender while controlling for the impact of the other variables. We begin the analysis by conducting t- test of independent samples in order to verify the wage per hour.

Comparing Means- Independent-Samples T Test

Table 3 presents the average wage per hour by gender and rank.

Table 3. Means of related wages for women (N=1,208), and men (N=430)

	Women N=1208	Men N= 430	Difference between men and women
	Wage per hour	Wage per hour	
Total sample	40*	55	15
Rank 1	29*	45	16
Rank 2	37	43	6
Rank 3	44	41	-3
Rank 4	48**	63	15
Rank 5	59	66	7
Rank 6	73	78	5

*Means difference significant at the 0.000 level (2-tailed)

** Means difference significant at the 0.01 level (2-tailed)

Table 3 indicates the obvious, the higher the rank, the higher is the wage per hour. Exemption is the lowest rank (1), maybe because this rank includes more manual workers to whom there is a great demand. It should be noted that while there is a significant difference between the average wages per hour earned by men (55) as compared with that of women (40), the impact of gender is less significant when computed by rank at work. Of the six ranks, in only two ranks the difference by gender is statistically significant.

Stepwise Linear Regression

Table 4 below presents the result of a stepwise linear regression to explore the gender influence on wage per hour. As controlling variables, working hours, age, education and rank,

were included using dummy variables. The regression result: $R^2=.42$, ($F(10,1585)=114.361$, $p<.001$).

The results indicate that all the control variables impact the wage per hour to some degree. The most important factor control variable is the extent of working hours. This factor has a negative influence on the wage, indicating that workers who spend more time on the job earn less per hour. This observation can be explained by the facts that working hours increase by rank, while workers at high ranks are compensated for extra work hours by fringe benefits rather than by direct salary. As can be expected, the second most important factor is the rank position with higher ranks receiving higher per-hour wages. Similar relation was found for the impact of education. Finally, age is also impacting wages, where younger employees earn less per hour.

Even after the impact of all other variables is accounted for, the gender factor was highly significant and has more influence than age and education, that is, men receive higher wages even if they have the same rank, education and age. It can be concluded that there is still a discrimination effect in Israel, with women receiving lower per-hour wages.

Table 4. Summary of coefficients, dependent variable- wage per hour

	Beta standardized	t	Sig.
Working hours	-.577	-27.148	.000
Gender (woman-0, man-1)	.175	8.725	.000
Rank 2	.159	7.332	.000
Rank 3	.233	10.421	.000
Rank 4	.325	14.314	.000
Rank 5	.315	14.273	.000
Rank 6	.397	17.746	.000
Education 12-14 years	.060	2.891	.004
Education 15+ years	.180	8.115	.000
Age <35 years	-.089	-4.558	.000

In addition to wages and salaries, women are discriminated by receiving fewer fringe benefits even when they are in identical ranks with men. Accordingly, we conclude the analysis by assessing this assertion. Table 5 presents fringe benefits that have high economic value by gender and rank.

Table 5. Percent of women and men receiving fringe benefits having high economic value.

	women			men		
	Company car	Own car Expenses	Cellular phone	Company car	Own car Expenses	Cellular phone
Total sample	7%*	20%*	13%*	27%	31%	30%
Rank 1	-	9%*	3%*	1%	31%	17%
Rank 2	1%*	13%	12%	7%	17%	10%
Rank 3	3%*	41%	20%	15%	41%	18%
Rank 4	13%	31%**	17%**	20%	23%	30%
Rank 5	32%**	32%	32%	58%	28%	69%
Rank 6	40%*	10%	28%**	75%	15%	53%

*Means difference significant at the 0.000 level (2-tailed)

** Means difference significant at the 0.01 level (2-tailed)

Table 5 shows that regarding important fringe benefits like getting company car or company cellular phone, there are significant differences between women and men regardless of the rank position.

These differences are even more striking when considering participation of employers in covering the costs of transportation either by providing a company-owned car or by covering the expenses of holding employee owned car. Adding values in the first two columns respectively, it can be seen that while almost all men employees in ranks 5 and 6 (about 90%) have one of these benefits, only 50% to 60% of the women employees do.

Discussion

It is “common knowledge” that women are receiving lower pay for equal efforts. All over the world, in developed and developing countries, studies and formal statistics confirm this knowledge. Usually the published data relates to women and men employees in general, not weighing up the economic value of the work done. Yet, women have lower levels of job positions and spend fewer hours on-the-job. The purpose of this study was to discover whether the lower pay is explained by these factors or there still is an element of gender discrimination. We achieved this purpose by conducting a large scale survey in 10 large companies and collecting data by rank and gender.

In line with the widely accepted knowledge, we demonstrate that in the Israeli case, women are only discriminated in wage payments if they have lower positions at work, thus, getting lower salaries, but regardless of their position all women are discriminated in the reception of fringe benefits.

Special attention should be given to economic valued fringe benefits. These fringe benefits can be divided into two groups. The first group comprises of benefits that are determined by negotiation between labor unions and management including contribution to pension fund, the addition of month 13 added salary, bonus payments, subsidized meals and holiday gifts. No significant differences were found between women and men in this group. The second group is composed of benefits that have real economic value that are at the discretion of management, such as a company owned car, a company owned cellular phone and individual expenses reimbursement. Significant differences were found in this group, with more men receiving these benefits. It can be concluded that the Israeli labor union contribute to the elimination of discrimination by gender in the Israeli economy.

For future research, the question remains whether there is indirect discrimination of wage by assigning of women to lower ranking positions not suited enough for their formal and informal capabilities.

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Sustainable tourism and well-being at working places

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Abstract

Is it possible to develop a sustainable tourism, based on mutual respect, curiosity for diversity, mutual of values and experiences? With positive effects on both the natural and cultural environment? Will this radical change of values even have repercussions on tourism connected working places like travel agencies, hotels and hostels, car rentals, managerial situations, resulting in an increase in wellbeing for those involved? And no longer concentrated only on profit? And how to proceed to effectuate this complex of values changes? These are the question our project on sustainable tourism is trying to shed some lights on.

The cross-cultural aspect is covered by a cooperation between France, Sweden, Marocko and Greece. The approach, although mainly phenomenological, is plurymethodological. The phenomenologically grounded Meaning Constitution Analysis has been applied for the collection as well as analysis of data.

Le tourisme durable et le bien – être au travail

Objectif et contexte du projet

Il y a des problèmes de qualification et de fidélisation des personnels dans l'hôtellerie et la restauration. Et, il y a un renouvellement important des effectifs de l'entreprise par la génération Y. Et, pour les responsables des ressources humaines ainsi que les responsables de formation, ce renouvellement présente différents enjeux. D'abord, il y a la transmission des savoirs, nécessaires à la pérennité de l'entreprise. Or une transmission efficace du savoir relève de la co – construction entre le jeune Y et l'expert. Ensuite, l'arrivée de la génération Y correspond également avec le développement de la production de services; signifiant en cela que le service produit s'appuie sur la coopération entre le client et l'employé. Si bien que les pratiques managériales sont différentes de celles pratiquées dans les entreprises de culture industrielle. Par ailleurs, génération du Web 2.0, les Y bouleversent l'organisation traditionnelle du travail en proposant des travaux d'équipe et en réseau. De plus, les Y, dont l'origine est « Why » en anglais n'obéissent aux ordres que s'ils les trouvent légitimes d'où le « Why ». Enfin, cette génération intégrera et managera la génération Z d'ici quelques années. Il apparaît que le phénomène Y et Z (à fortiori) entraîne une rupture des pratiques organisationnelles et managériales, rupture nécessaire pour réussir leur intégration d'une part et la pérennité de l'entreprise d'autre part.

Cependant au-delà des enjeux de pérennité économique de l'entreprise vue du point de vue des praticiens de la gestion des ressources humaines, et des adaptations à la marge que pourraient consentir les directions d'entreprise, la génération Y est aussi porteuse d'une transformation potentielle des pratiques managériales, à partir du moment où celle – ci ne s'engage dans l'entreprise si elle y trouve du sens. En cela, elle ne veut pas être un rouage de la machine organisationnelle; et en tous les cas, elle souhaite un équilibre vie privée vie professionnelle, et à apporter sa contribution aux valeurs du développement durable.

De plus, cette génération, à la différence de la génération X, est une génération qui voyage dans le monde, via la mobilité erasmus notamment, découvre les différences, apprend à s'en accommoder au sens de Piaget, et a un potentiel d'altérité (Enriquez) et d'empathie (Rogers). A ce jour, il n'y a pas de recherches établissant le lien entre les générations et le modèle organisationnel.

L'objectif de cette recherche est d'envisager un modèle organisationnel facilitant l'intégration des Y (puis des Z) dans un monde économique, marqué par la mondialisation, et par la recherche de sens. Le cadre théorique du contrat psychologique est mobilisé. Cependant, le contrat psychologique tel que le définit Argyris (1960), n'assurant plus à l'employé un travail pour toute la vie dans la même entreprise, d'une part et la recherche de sens étant prépondérante d'autre part, il apparaît nécessaire de le revisiter. Les référentiels des valeurs du tourisme durable et du bien-être au travail ainsi que l'approche du mouvement brownien sont retenus pour proposer un recadrage du contrat psychologique.

La question de recherche concerne l'influence du référentiel des valeurs du tourisme durable et du bien-être au travail sur le modèle organisationnel qui intégrera la génération Y, porteuse d'un questionnement sur le sens du travail. Ce questionnement peut profondément agir sur la transformation des pratiques managériales si l'environnement organisationnel le permet. Etant entendu que l'environnement organisationnel est constitué d'un certain nombre de déterminants tels que la structure économique, la pratique des gestions des ressources humaines ou des hommes, le marché, la communication interne, la personnalité du leader, et la répartition du pouvoir par exemple. La marque employeur complétée par l'approche brownienne fera le lien entre la stratégie de l'entreprise et son environnement.

L'objet de la recherche est d'examiner et de mettre en évidence les liens entre l'approche stratégique du référentiel des valeurs du tourisme durable et du bien-être au travail, et l'adoption de modèles organisationnels pour intégrer les Y. Pour cela le cadre d'analyse distingue trois niveaux:

- 1) le référentiel des valeurs du tourisme durable et du bien-être au travail,
- 2) le modèle organisationnel,
- 3) les stratégies des générations Y et Z.

Trois variables retenues concernent : le référentiel des valeurs du tourisme durable et du bien-être au travail, la typologie du modèle organisationnel, et la stratégie des générations Y. Chacune de ces variables comporte plusieurs modalités:

Les modalités du référentiel des valeurs du tourisme durable et du bien-être au travail concernent deux stratégies d'entreprise:

- le référentiel s'appuie sur la norme et la réglementation : l'application de la norme et de la réglementation est associée à un faible degré de prise en compte des dimensions du tourisme durable et du bien-être au travail dans la mission et les rôles de l'entreprise,
- le référentiel s'appuyant sur les valeurs est associé à un fort degré de prise en considération des valeurs du tourisme durable et du bien-être au travail dans la mission et les rôles de l'entreprise.

Les valeurs du tourisme durable et du bien-être au travail présentent des similitudes dans le sens où elles expriment le respect de l'environnement, le respect de soi et de l'autre, le respect de la culture, la prise en compte de l'individu dans sa totalité et le développement économique locale.

Les modalités de la variable stratégie des générations Y sont:

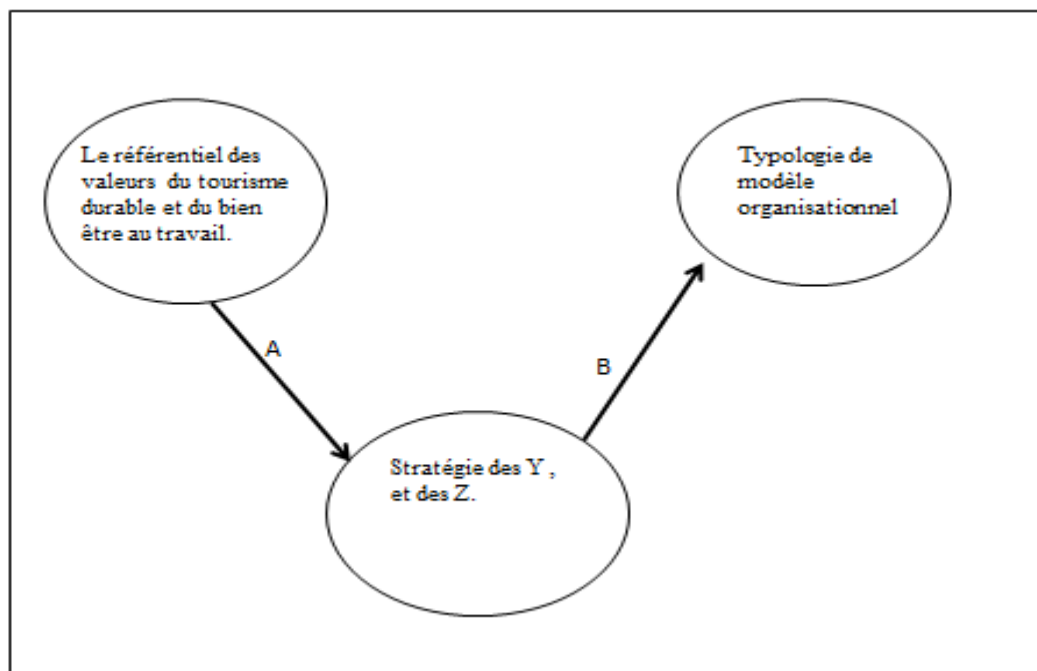
- La stratégie sur adaptative correspond à un faible degré de prise en compte des dimensions du référentiel par l'entreprise. Il y a un risque de mal – être au travail. La perte de sens, la confiscation du pouvoir, le délitement du collectif de travail sont trois indicateurs de ce mal – être au travail.
- La stratégie d'engagement correspond à un fort degré de prise en compte des dimensions du référentiel par l'entreprise. La personne peut exercer son pouvoir dans l'organisation de son travail, et développe des actions responsables. Elle a une capacité d'action tournée vers l'avenir, et entretient de bonnes relations avec ses collaborateurs. En outre, la qualité du collectif de travail résulte des processus d'individuation des employés, lesquels résultent des pratiques managériales, lesquelles résultent des comportements du leader.

Les modalités de la variable « typologie du modèle organisationnel » représentent:

- L'organisation qualifiante est liée à un faible niveau de prise en compte par l'entreprise des dimensions du tourisme durable et du bien - être au travail. L'apprentissage en première boucle (Argyris, Schön, 1974) est un indicateur de l'entreprise qualifiante (Barthod – Prothade, 2009).
- l'organisation apprenante est liée à un fort niveau de prise en compte par l'entreprise des dimensions du tourisme durable et du bien – être au travail. L'apprentissage en troisième boucle et de niveau 3 (Batesson, 1977) constitue l'indicateur de l'organisation apprenante (Barthod – Prothade, 2009).
- l'organisation pathologique est liée à un modèle d'organisation centré sur le mode de direction de type autocensure du référentiel des dimensions du tourisme durable et du bien – être au travail. Le comportement du leader a des effets dévastateurs sur les personnes et l'organisation (Kets de Vries, 2006).

Le schéma 1 présente le modèle de la recherche.

Schéma 1. Le modèle de la recherche



L'intérêt de ce modèle est d'identifier des situations hypothétiquement observables puis de présenter quelques hypothèses de travail.

Selon notre revue de littérature, il en résulte plusieurs modèles organisationnels possibles:

- 1) le modèle organisationnel apprenant
- 2) le modèle organisationnel qualifiant
- 3) le modèle organisationnel pathologique.

Hypothèses de travail

H1: Lorsque l'entreprise intègre le référentiel des valeurs du tourisme durable et du bien – être au travail, comme valeur managériale, le modèle organisationnel est l'entreprise apprenante. L'entreprise apprenante peut potentiellement permettre à la génération Y de construire le sens au travail et ce faisant redéfinir le collectif de travail. La capacité est « potentielle » car elle dépend en partie de l'environnement interne de l'organisation. Cet environnement est exploré selon l'approche issue des travaux de Brown.

Il en découle que lorsque l'entreprise applique la norme et ou la réglementation, le modèle organisationnel est l'entreprise qualifiante.

H2 : Lorsque le modèle organisationnel est l'entreprise apprenante, la stratégie des Y est celle de l'engagement à l'égard de l'entreprise ; un cercle vertueux peut alors se développer

H3 : Lorsque le modèle organisationnel est l'entreprise qualifiante, la stratégie des Y est celle de la sur adaptation. Il y a un risque d'individualisation et de mal être au travail.

H4 : Lorsque le modèle organisationnel est l'entreprise pathologique, la stratégie des Y est celle de la fuite.

Cadre théorique

Le cadre théorique mobilisé est celui du contrat psychologique. Avec l'aide du mouvement brownien, il s'agira alors d'observer comment varie les référentiels du tourisme durable et du bien-être au travail au sein de l'organisation. Le mouvement brownien soulignant l'importance de la relation d'échange entre la particule et l'environnement, il paraît judicieux d'observer l'impact de l'environnement sur l'intégration ou non des référentiels.

Après avoir présenté le mouvement brownien, seront abordés successivement le concept de générations (X, Y et Z), le référentiel des valeurs du tourisme durable et du bien – être au travail. Les différentes modalités organisationnelles et les stratégies des Y dans l'entreprise : (la sur adaptation, l'engagement, la fuite) seront exposées. Enfin, une modélisation du contrat psychologique est envisagée.

Méthodologie

Une recherche qualitative ancrée dans la rencontre avec la génération Y

Inscrite dans une posture constructiviste, notre recherche a démarré en 2013 à l'aide d'une méthodologie phénoménologique (Husserl, 1994), à partir d'une question ouverte sur la thématique des vacances auprès de 46 personnes d'âges, de sexe et d'origine socio professionnelle différents.

Leur récit est analysé avec l'approche phénoménologique. L'exploitation des données est faite en deux temps : d'abord avec le logiciel Sphinx pour extraire les thématiques des textes, et ensuite avec le logiciel MCA-Minerva pour en faire une analyse en profondeur.

La phénoménologie d'Husserl

La méthodologie retenue est une adaptation de la phénoménologie de Husserl (1992), et de l'approche qualitative. La phénoménologie de Husserl a pour objectif d'accéder à la

connaissance. Pour cela, il propose de mettre en avant le monde de la vie de la personne – die Lebenswelt-. Le monde de la vie de la personne représente alors le sens qu'elle lui donne, étant entendu que « die Lebenswelt » est composé du sens que la personne apporte aux choses qu'elle vise.

La phénoménologie ne sépare pas la personne de son monde, dans le sens où elle forme et est formée par son monde.

Le but d'Husserl est d'accéder à la connaissance des choses telles qu'elles sont en elles – mêmes, par le retour au monde de la vie où, par l'expérience continue faite par le sujet, s'est formé le sens de toutes les formations ultérieures, dans les sciences autant que dans le quotidien.

Pour cela, le philosophe a élaboré une méthodologie en trois temps: l'époché, la réduction phénoménologique et transcendantale, nous mettant à jour ce monde vécu.

L'époché constitue l'étape de suspension du jugement au cours de laquelle, le chercheur accède au monde du sujet, sans lui imposer son propre modèle. Le chercheur dégage une connaissance première dans la mesure où, il est conscient, que, cette étape l'invite à considérer que, étant donné que c'est le sujet participant à l'étude qui donne du sens aux choses sur lesquelles il s'exprime, l'objectivité scientifique exige de donner au sujet le plus de liberté possible pour l'expression de ce sens. En cela, l'époché, première étape de l'analyse des textes, permet donc au chercheur d'opérer la réduction des choses et des mondes à leur statut de sens et de bien avoir en tête que ce sens vient des personnes qui ont répondu à une question ouverte. L'époché est donc nécessaire mais elle n'est pas suffisante.

La réduction phénoménologique-transcendantale est la deuxième phase au cours de laquelle, le chercheur essaie de percevoir le monde de l'autre justement tel qu'il est perçu par cet autre. Le monde est considéré en tant qu'il est apparaissant, (étant entendu que l'époché est maintenu), c'est-à-dire comme un phénomène, où l'individu se perçoit comme percevant le monde. Dans la réduction, le chercheur ne regarde que l'objet et l'acte par lequel il atteint l'objet. Et cet acte par lequel il atteint l'objet est défini comme une unité intentionnelle. La constitution de la connaissance peut alors s'opérer.

L'analyse des textes révèlent les unités intentionnelles des mondes de vie des différents acteurs. Elles sont développées plus avant dans la partie résultat.

La collecte et le traitement des données: MCA – Minerva

Les données sont recueillies au moyen de réponses à une question ouverte. Les participants concernés sont le dirigeant, le manager, les employés d'une entreprise, soit au total 25 personnes. Cette approche s'est déroulée à la demande du dirigeant qui souhaite développer des pratiques managériales « *pour développer leur autonomie dans un environnement de plus en plus turbulent* ». Elle s'est déroulée dans l'entreprise, pendant dix jours. Ensuite, un focus groupe auprès de la direction et des employés a été réalisé. Il s'agissait de leur présenter les résultats de l'analyse, de les mettre en discussion, de les compléter, de les valider avec les participants.

La question ouverte, selon l'approche phénoménologique est utilisée; pour laisser au sujet la liberté d'expression, car l'enjeu est d'éviter d'influencer les réponses des participants par le biais d'un questionnaire (Sages, 2006). La question ouverte posée est: « *Pourriez – vous exprimer avec vos mots, vos émotions, ce que représente pour vous votre travail?* »

La méthode de traitement des données provient de la phénoménologie. La phénoménologie est utilisée comme un moyen pour extraire le sens que les participants donnent à leur contexte tel qu'ils le construisent et le voient (Karlsson, 1995, Sages, 2006). Pour ce faire, il importe de pouvoir extraire ce qui est dit implicitement dans le matériau. La synthèse passive accompagne tout matériau (Husserl, 1994).

Le philosophe souligne que la passivité échappe à notre conscience tout en constituant le niveau élémentaire de la constitution du sens. Ainsi, ce concept qualifie cette genèse perpétuelle et inconsciente du sens de tout ce qui nous environne. La synthèse passive permet à tout à chacun d'accéder au concept. Par exemple, je suis capable de saisir immédiatement que cet objet est une table. J'ai dû pour cela opérer une synthèse et le souvenir d'expériences antérieures durant lesquelles j'étais en présence d'une table. Ainsi, il apparaît que cette synthèse est opérée à l'occasion de tous nos vécus. Mais pour que la table apparaisse à ma conscience, il faudra parvenir à éveiller ce souvenir primaire, telle la madeleine de Proust. Le modèle de la passivité est un moyen de faire apparaître au sujet, ce qui était non oublié, mais sédimenté et formant ainsi la base non visible de la formation du sens exprimé, la synthèse active.

Ainsi, la clé est de ne rien considérer comme acquis, et d'observer chaque phrase comme « une connaissance nouvelle que présente le participant ».

Le Meaning Constitution Analysis (MCA) et le logiciel Minerva (Sagès, 1994, 2006) complètent l'approche phénoménologique, en donnant sur cette base la possibilité d'un travail de recherche empirique.

Le Meaning Constitution Analysis– le MCA est donc une approche de recherche et d'analyse fondée sur la phénoménologie. MCA et le logiciel MCA- Minerva, permettent l'analyse des textes et des transcriptions d'interviews.

Des informations implicites sur les mondes et les situations ayant favorisé la constitution de sens sont alors mises à jour, grâce à la liberté d'expression laissée au sujet (Sages, 2006), d'où la question ouverte. Les entités, les prédicats, les modalités d'expressions ainsi que les horizons de compréhension et d'expectations des sujets forment les bases de l'interprétation phénoménologique. Cette interprétation est indépendante des compréhensions culturelles, scientifiques et du sens commun (Sages, 2006).

Il s'agit de regarder chaque phrase comme si ce qui y est verbalisé était nouveau, afin d'analyser le sens que prennent les mots pour la personne qui les exprime. Selon Husserl, nos habitudes, notre quotidien, nous font oublier que seule, notre conscience, prise au sens large, peut attribuer un sens à quelque chose. Husserl précise alors, que l'époché nous invite à envisager de cesser de croire à l'existence indépendante des choses et des mondes; autrement dit, si le sujet ne crée pas les choses, le monde, tel que le monde du travail, de l'entreprise, des relations de travail, par exemple, c'est néanmoins le sujet qui donne un sens à ces choses. Et cette activité consistant à donner une signification, un sens est appelée intentionnalité (Karlsson, 1995, Sages, 2006).

Le MCA- Minerva est un logiciel; il permet d'organiser le texte en unités de sens. Une unité représente alors un élément d'une phrase. Par exemple, la phrase « J'ai créé mon entreprise, il y a une dizaine d'années, avant j'étais souvent présent, mais depuis l'explosion des loisirs

dans le domaine des via ferratas, des accro branches, je passe tout mon temps à l'internationale, pour développer des partenariats. » peut être décomposée en quatre unités: 1 j'ai créé mon entreprise, il y a quelques années, 2 avant j'étais souvent présent, 3 mais depuis l'explosion des loisirs dans le domaine des via ferratas, des accro branches, 4 je passe tout mon temps à l'internationale, pour développer des partenariats.

L'action de réduire le texte à de petites unités de significations a lieu pendant l'époché. L'étape suivante consiste à définir les modalités d'expressions de chaque unité. Il s'agit alors d'identifier comment l'individu vit son monde (Sages et Lundsten 2004, Sages, 2006). La troisième étape est de trouver l'intention partielle, qui constitue la synthèse passive. L'intention partielle révèle l'entité, et l'entité existe comme quelque chose de significatif pour la personne qui l'exprime. Le sens d'une intention partielle est une entité et la façon dont elle est exprimée est appelée un prédicat. Une entité peut avoir une ou plusieurs prédicats. L'entité et le prédicat expriment la façon dont la personne donne du sens à la chose. L'intention partielle est réalisée avec la réduction phénoménologique- transcendantale.

Dès que les unités, les modalités, les entités et les prédicats ont été identifiés, un tableau comparatif de toutes les entités des participants a été élaboré. Ce tableau permet de mettre en relief les points communs et les différences entre les participants.

Le focus groupe, est le moment qui correspond à la troisième étape de l'approche Huserllienne, qui est celle du retour au monde.

Au cours du focus groupe, le chercheur fait part de l'interprétation des mondes des participants: ils valident, discutent, complètent. La particularité de l'approche phénoménologique avec MCA – Minerva est la dynamique itérative. Cependant, celle – ci se distingue de la théorisation ancrée. Dans l'approche phénoménologique, l'analyse commence avec le logiciel Minerva. Avec la théorisation ancrée, elle démarre avec la collecte des données. Selon, cette approche, le chercheur peut orienter les prochaines interviews et observations suivantes sur la base de l'analyse réalisée à partir de quelques entretiens et de quelques observations. Avec l'approche phénoménologique, le chercheur peut poursuivre l'analyse dans le texte. Il développe une approche circulaire des données recueillies à partir du sens implicite qui émerge des matériaux. Mais ce n'est pas tout, le sens alors mis à jour, étant présenté aux participants, ceux – ci deviennent acteurs de leur propre transformation.

Cette approche nous permet de capter des relations et des représentations, qu'une démarche quantitative ne permettrait pas d'appréhender. De plus cette approche permet l'ouverture d'un « Spielraum möglichkeiten », suivant l'expression de Husserl.

Ainsi, pour Sages, (2001), parmi les possibilités, il y a celle qui est de considérer que les questions et les problèmes scientifiques sont des problèmes de vie, ancrés dans le monde de la vie d'un groupe d'humains. Ils doivent être travaillés et développés, dans une époque scientifique, un éloignement permettant un traitement efficace des données, mais seulement dans le but d'être reposés avec des solutions adéquates, c'est-à-dire utilisables, aux groupes dont ils sont issus. Cette manière de faire de la recherche passe par la nécessité de considérer la personne avec altérité (Enriquez, 1999). Le concept d'altérité définit la capacité du sujet à « reconnaître l'autre en tant que sujet qui cherche la satisfaction de ses propres désirs et non en tant qu'objet de la satisfaction de mes désirs, c'est reconnaître l'autre dans sa différence et dans sa similarité avec nous » (Cuevas, 2012). L'altérité entretient le respect de l'autre et de soi, et participe alors au développement d'une écoute de l'autre, certes mais aussi

à une approche différente de la personne. Personne active, capable d'action afin de transformer la situation selon ses propres désirs et besoins (Crozier, Friedberg, 1974, Giddens, 1987, Sages, 2001). Et sa capacité d'action est bénéfique pour autant qu'elle a le souci d'autrui. Ainsi, il est permis d'espérer la mise en mouvement d'une boucle vertueuse des valeurs du tourisme durable et du bien – être au travail.

Résultats de la recherche

Les premiers entretiens ont été réalisés. Les résultats des deux types d'analyse mentionnés seront présentés au cours du congrès fin juin. Il sera alors possible de désigner des indications propres à, soit l'amélioration de conditions négatives, soit à la mise en place de dispositifs d'organisation et, surtout de relations entre le personnel de façon à minimiser les risques de dérives pathologique et dangereuses pour le bien-être du personnel grâce à et par le développement d'une bonne atmosphère due au travail commun de développement d'un tourisme durable, menant à des entreprises durables.

Le rôle de l'environnement sur le contrat psychologique

L'aspect cross-/cultural de notre recherche est de favoriser les découvertes en comparant les similarités et différences existants entre diverses cultures et groupes subcultures. Cela permettra aussi de mieux réaliser l'objectif principal qui est de générer le respect mutuel, respect pour l'autre, que puis-je leur donner, suis-je prêts à recevoir ce qu'eux ont à m'offrir...

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Chapter 6: Innovation, Technology, and Knowledge Management

Integration of auxiliary staff in New Product Development (New PD) Processes

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Abstract

The objective of the present study was to reveal cause effect relations between the integration of auxiliary staff in the execution phase of variant construction projects within a 3D CAD environment and economic and socio-psychological efficiency project outcomes. The analysis starts with an engineering environment best described with the theories of job enrichment driven by integrated SW. The result is a job profile for engineers, responsible for all information necessary to produce the new products. In opposite to this situation the author is elaborating his model of a task and competence related integration of auxiliary staff in new product development processes. Data obtained from 130 experts revealed the hypothesized increase of economic and socio-psychological efficiency by using the model adequately.

Introduction

The empirical evidence of unbalanced task allocation in the nucleus of new PD due to over-assessed SW tool capabilities on the one side and the insights received from intensive literature review and extended theoretical analysis on the other side encouraged the author to propose and discuss a model of Integration of Auxiliary (IofAS) within mechanical development teams (MDTs) in contrast to a model nearly without any task related support, characterised with the well know term of job enrichment. Scientific databases are used to elaborate the topic success criteria relevant for the establishment of coherent team structures, coherent integration of auxiliary staff into mechanical development departments (MDD). The term coherent is used to comprise task as well as competence related integration: The overarching topic of task and competence related team composition is approached by the discussions of division of labour, team building, leadership, theory of constraints, overlapping of processes and job and task satisfaction. Thus the major mechanisms related to economic and socio-psychological efficiency are identified - with a particular view on possible implications on basic operating units in MDDs. The idea of this paper is pointing at those overestimated SW systems in general which, at the attempt to integrate several or all business disciplines/functions into a compound SW package, traditional a central goal of business informatics (Müller 2004, p.1), are not taking single working units into account adequately. It seems that the challenge to cover the complete product cycle within a SW system, from the idea resp. customer demand to dispatch and in-service support, has caused not only improvements in all fields concerned. As 3D CAD is the dominant SW of that kind in the area of the development of new products, this research paper is referring to 3D CAD.

Theoretical foundation

Efficiency and effectiveness are very common terms, not only in connection with business affairs. In general, an activity is effective, if it produces the intended result; i.e. according to P. Drucker, if the right things are done related to a defined goal. In comparison, an activity is efficient, if it is performed with the least waste of resources, time, cost or man power, i.e. again according to the classicist in management theories P. Drucker, if the things are done right, without any waste (Drucker, 1993, S. 1 sq.). For simplification reasons the author is using the term efficiency to cover the complete rang. Economic efficiency in the process of new PD is achievable by shortening of downtimes and of processing time and by a reduction

of the consumption of material and other efforts during the development phase. As far as the time factor is concerned, one subject of this paper, the means of choice are better co-ordination between efficiency units (indirect rationalisation), optimisation of the processing operation (direct rationalisation) or/and the combination of indirect and direct rationalisation. The main branches of economic and socio-psychological efficiency increase measures within the development of products are relief of bottlenecks, job satisfaction, scheduled capacity planning, standardisation, cross-functional teams, overlapping task strategies, division of labour, etc. which can be seen as an basis for the overarching theory of competence and task related team composition (Wittenstein, 2007, p. 22 sq.; Fischer, 2008, p. 2). In the following, the main efficiency increase measures for competence and task related team compositions are being controverted in order to transfer relevant findings to the object of this study.

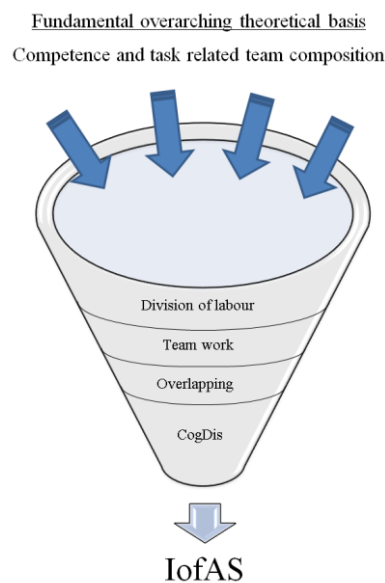


Figure 1. Efficiency improvement by IofAS in MDDs - The way of agglomeration of the model-relevant theories - Source: Author

As visualised with figure 1, the way of the discussion of the theories and related researches is a continuous narrowing from vague assumptions to a clear formulation of the basic idea for the presented new model. Starting with the relatively imprecise, spacious, but never the less fundamental theme of division of labour the ongoing proceeding receives a first refinement by the discussion of the topics team composition, teamwork, competence diversity and familiarity. With the subsequent extensive treatment of overlapping of development activities this literature research already concentrates on the central subject of that work and achieves his final focus by adding the relevant socio-psychological aspects, especially the theory of cognitive dissonance (CogDis).

Success criterion division of labour

With the implementation of 3D CAD the world of engineers seemed to become a completely new and fascinating one in which the engineer is a 100% creative part of an innovative company – with all supporting activities taken over by a marvellous software, automatically and completely. However this did not work and speed and innovation, the keys to success are at risk. It is commonly agreed in theory as well as in practice that speed and innovation are the key points for success in commercial competition (Abolhassan, 2003, p. 1 sq.; Anagnost, 2005, p. 14) and that the development departments are one of the greatest bottlenecks in the

turbulent, fast-moving business environment (Ehrlenspiel, 2007, p. 241 sqq.). There is actual a basket of methods available to overcome the pressure on engineers in development departments, e. g. project management, process oriented approaches or division of labour and standardization. According to these ideas companies have worldwide established their procedures since decades, partially already since more than 100 years, until a “revolution” has dramatically changed at least the organization of MDDs, the 3D CAD. With that new SW generation the engineers in these companies have more or less lost their “right-hands”, the technical auxiliary staff, and the massive drawing documentation work was creeping towards the engineer. This over-reaction was initiated by the fulsome praise of the software development companies, was - unconsciously - fostered by the universities in the course of the qualification of engineers and was put into operation by the management of commercial companies in expectation of substantial reductions of lead time and cost. But one tricky outcome of that SW revolution was that even with the new design system the possibility to “produce” more variants and the customer demand for more variations increased essentially, with a rather negative impact on the volume of documentation and the workload of the engineers (Wildemann, 2003, p. 7). Recent analysis of the workload of development engineers revealed – unsurprisingly – that at least one third of the working hours is related to supporting activities, to distributable work (Wittenstein, 2007, p. 166 sqq., p. 189; Ehrlenspiel, 2007, p. 277 sqq.). Time for the actual development of products is drastically restricted, especially in MDDs. Owing to the mentioned developing engineer’s enforced multi-functionality, i.e. the already addressed SW-driven job enrichment, concepts proven in practice which offer with given resources the best possible solution are often preferred (Ehrlenspiel, 2007, p.241 sqq.). These exploitation processes with their unsound fixation to existing solutions is one big hurdle for innovation (Kliesch-Eberl & Eberl, 2009, p.2) and according to (BMBF, 2011) the capability to innovation of small and medium sized companies is especially strong related to the availability of sufficient qualified and experienced members of staff. But even task integration as well as specialization are limited in respect of motivation improvement and (Weltz & Bollinger, 1987, p. 52ff) called for a task and job based specialization. (Kühn et al., 2006, p. 154) noted a rising integration of tasks by specialized experts, of tasks, which could easily been done by people with different (or lower) level of expertise, competences or education. These are notable hints on economic as well as socio-psychological inefficient operations and already (Mayer, 1988, p. 159ff) demands in the year 1988 a cooperative division of labour with a specialized expert in the centre. Therefore the author does not hesitate to stress the importance of division of labour, which may be seen self-evident, because he feels division of labour belongs to the category of “right things” which actually must be done (in the sense of P. Drucker - as referred to in p. 2). The further proceedings of that paper are built on this basement and are subject to the category of doing the things right (following P. Drucker verbalisations). The question of how to organise that coherent division of labour leads right to the discussions among scientists and practitioners about team composition.

Success criterion teamwork

This part illustrates the research results concerning the relationship between team composition in new PD and project respectively team performance. The study of various scientific databases revealed that the degree of functional diversity in development teams which is supposed to promote performance is an inadequate variable. Essential to compose successful teams are at least competence diversity and familiarity. The intention of this paper is to consider competence diversity not only for companywide teams but also within single working units in MDDs, in the nucleus of new PD. The discussions follow the designed

proceeding of that project outlined in p. 2 figure 1 with a first refinement of the basics of division of labour by team related theories in order to advance towards the proposed model of IofAS. As scientists have concentrated their researches on the perceived multiple manifestations of teams you can nearly find as many team composition guidelines in scientific literature as teams in business life. Actually these guidelines often seem to be contradictory. A few statements may demonstrate that range. For example: the most important attributes of a team member are individual knowledge, skill and ability. Or: team success or failure is determined by generic teamwork skills (above individual skills). Another example is: teams are most efficient if every team member applies his individual style. Or: shared mental models/approaches (cognitive consensus) increase team performance, etc. (Hollenbeck et al., 2004, p. 353-366) collected these and various other examples and demonstrated the complexity of team composition with references to the results of recent researches made to get more reliable answers. Mello and Ruckes (2006, pp. 1019-1039), to cite another example, conclude teams composed of individuals with different characteristics have the potential to reach better decisions because they access more varied information sources. But they also note that members of heterogeneous teams are more likely to diverge in their preferences with respect to courses of action, which is reflected in lower effort. According to Pelled (1996, pp. 615-631) demographic diversity tends on the one part to increase turnover, but its effects are more mixed, sometimes enhancing performance and sometimes impairing it. And in this context Hollenbeck et al. (2004, p. 353-366) state, demographic diversity is actually less important to team performance than psychological diversity, especially over time. Task and competence orientated team composition is to be considered in two ways: one is to identify the relevant variables determining team composition; the other way of examination is to explore variables which are determined by team composition. Both points of view are taken in the process of modelling a coherent IofAS, the subject of this project. The general proceeding for team composition (and monitoring) is analysing the task and the required outcomes, looking for suitable members for the individual task, changing the qualification of members (training) or selecting different members and changing the task.

Success criterion modern product development methods

Scientific paper on overlapping processes often concentrate their research on new product development activities as these are commonly understood as crucial for the success of a company in a rapid changing market. An important direction of New PD are the attempts strongly influenced by Japanese way of proceeding to shorten development times of products through overlapping development activities for the product and the overall New PD process. In addition to the avoidance of downtime further potentials in proceeding time have been identified. It is possible to link pairs of activities by starting first actions of a succeeding activity even with only incomplete information gotten from its prior activity and to avoid delaying touch up through intensive co-operation in interdisciplinary teams. Simultaneous Engineering, Concurrent Engineering and Integrated Product Development are using this method of overlapping procedures. Overlapping, defined as the partial or full parallel execution of tasks and functional interaction with varying degree of information shared between business functions became more and more popular for many companies which act in a fast moving environment. However, in practice the flow of information and the process execution is largely sequential, with information being generated and finalized by the upstream activities before being absorbed by the downstream development activities (Krishnan et al., 1997, p. 437). But the three New PD phases, the preparation, creative and executive phase, can be performed sequentially or overlapped by allocating various components to one (sequential) or to various engineers (overlapped), or by transferring

finalized (constructed) part-information to auxiliary staff for documentation progressively (overlapped) – or not (sequential). In fact managers frequently make ad hoc decisions to overlap the normally sequential activities in order to overcome bottlenecks, thereby reducing delivery times. However concurrent engineering theory is capable to provide a formal process to realize cost and schedule savings by a systematic overlapping design activity (Ancona & Caldwell, 1992, p. 321 sqq.). As at the first glance the overlapping mode seems to be faster, actual researches are concentrating on various selected aspects of overlapping, such as on dynamic rework in overlapped schedules (Marujo, 2009, p. 90 sqq.), on acceleration model for projects with known rework fraction caused by overlapping (Gerk & Qassim, 2008, p. 590 sqq.), on measurement of the coupled strength of tasks, on a systematic approach to reduce costs and risks (Bogus et al. 2006, p. 829 sqq.) or on determination of corresponding cost and time trade-offs (Ancona & Caldwell, 1992, p. 321 sqq.). All these papers are more or less based on the seminal work on overlapping strategies by Krishnan et al. (1997). They provide a framework to help designers and managers to decide when and how to overlap pairs of activities with the intention to reduce product development lead time and to ensure at the same time that adverse effects on product quality and development effort are minimized. Tendentially substantiated as the best activity combination for overlapping procedures are a fast upstream process and an insensitive downstream process (Krishnan et al., 1997). This situation appears in the delaminated research area of the execution phase of variant construction projects within a 3D CAD environment and a possible work sharing between engineers and auxiliary staff. Therefore a reduction in lead time seems to occur largest.

Success criterion task satisfaction

Work satisfaction normally is recorded by an anonymous survey. Work satisfaction is characterised through the analytical unit – individual, the analytical element – labour, and the type of measurement – validation (Rosenstiel, 2003, p. 422). The reviews analyse mean values and scattering and are referred to departments, subsidiaries and total organisations. Since the beginning of the humanization of the working environment, work satisfaction is an indicator for humanization. Robbins (2003) defines job satisfaction as a subjective measure of worker attitudes, that is, an individual's general attitude to his or her job. Job satisfaction is the attitude to work and to the work situation with different aspects, the evaluated comments to one's work or work elements (Rosenstiel, 2003, p.424). In this context Rosenstiel points to Locke (1976) who describes work satisfaction as a pleasant and positive emotional state that follows from the evaluation of the own work or work experience. The search for this state, an equilibrium is one of the possible approaches to a classification of the various theories of work satisfaction, the classification into needs oriented, incentives oriented, humanistic and cognitive oriented concepts (Rosenstiel, 2003, p. 427). In the needs oriented approaches the organism seeks internal equilibrium. If the internal balance is disturbed, needs are recognised with the aim to act towards that internal equilibrium. Incentive oriented approaches assume that work satisfaction is the highest, the most pleasurable emotion are available to the individual. The focus of the incentive-oriented approaches is to determine those traits of the organisation that influence work satisfaction to a particularly high extent. Humanistic approaches claim that the aim of human action is self-realization and intellectual growth. Satisfaction accrues through facing challenges, which leads to new experience and connotation. Cognitive equilibrium approaches are dealing with the cognitive concept of people who try to match the perceived environment with their designed cognitive plan. Disturbances are recognized as tension and imbalance and they lead to dissatisfaction. Decreasing tension leads to satisfaction as a consequence of the emotional reaction. Satisfaction is found when the perceived conditions of the workplace optimally match the

perceived own role (Rosenstiel, 2003, p. 428; Aronson et al., 2008, p. 163). Demands and individual suitability, personal performance and wages should correspond to each other. There seem to be the possibility that engineers increase their contentment with the tasks by quitting documentation tasks and by focusing on their engineering role by allocating this documentation tasks to auxiliary staff.

Basic hypotheses and propositions

The way of the discussion of the theories and related researches was a continuous narrowing from vague assumptions to a clear formulation of the basic hypothesis.

The basic hypothesis is defined as:

H_B: The higher the degree of task and competence related integration of auxiliary staff, the higher the economic and socio-psychological efficiency of project outcomes.

The basic hypothesis can be further specified by the following propositions which point out the elements of the project outcome in detail.

H_{p1}: The higher the task and competence related integration of auxiliary staff, the higher the possibility of meeting the project deadlines.

H_{p2}: The higher the task and competence related integration of auxiliary staff, the higher the possibility of reducing the project costs.

H_{p3}: The higher the task and competence related integration of auxiliary staff, the higher the possibility of reducing the drawing set errors.

H_{p4}: The higher the task and competence related integration of auxiliary staff, the higher the engineers' contentment with the tasks.

H_{p5}: The higher the task and competence related integration of auxiliary staff, the higher the acceptance of engineers and auxiliary staff with the project progression.

H_{p6}: The higher the task and competence related integration of auxiliary staff, the higher the possibility of competence utilisation of engineers' competences.

Causal model

After having outlined the transfer of the relevant considerations and reflections - empirical and theoretical - into the basic hypothesis, the general efficiency assumption, and further into the collection of supposed cause-effect relations respectively propositions it is helpful to establish a more transparent view of the potential relationships by developing a structure qualified to test and examine them. Relations between variables of various types, manifest, latent, endogenous, exogenous etc., play a central role in real sciences, i.e. the sciences, dealing with actual phenomena, processes and events (Buch, 2007, p. III, Neuert, 2009, p. 135); and the causal analysis (or covariance structure model) is an established hypothesis testing method, applied when cause-effect relations based on empirical data sets need to be examined. Using this understanding for the object of this paper, one receives the above simplified explanatory model – figure 2 (next page).

Research Design

In toto 130 proven experts, 65 engineers and 65 auxiliary employees, were asked to evaluate recent product development projects, in the carefully restricted area with a structured questionnaire. A total of 130 questionnaires were evaluated in a statistical analytic procedure. Five different industrial sectors of mechanical development departments within different companies participated in this empirical field study. The industry sectors were automotive-, satellite reception-, frequency filter, mobile communication and measurement technology

equipment-industry. Through the research the basic hypothesis could be tentatively substantiated.

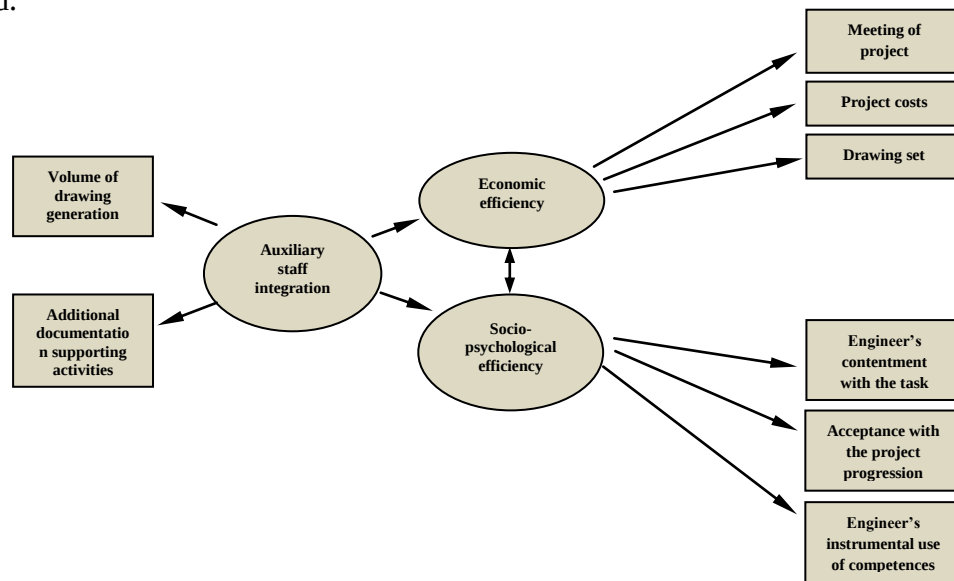


Figure 2. IofAS - Causal Model - Source: Author

Main suggestions

From the results of this scientific study the author suggests the following points:

1. By applying the model of integration of auxiliary staff, the management is in the position to bring one of the essential tasks of the engineer in the execution phase of mechanical development projects, the design of the components, back into the focus.
2. As job satisfaction is strongly related to the task content, also confirmed in the study, management must take care for a motivating task content/environment.
3. Management must compose New PD teams by taking competence diversity adequately into account to improve the quality of the development project.
4. Management must compose New PD teams (auxiliary staff and engineers), taking adequately the task content into account, relieve engineers from side tasks and increase the restricted time for development of new products.
5. Management must commit to the theory of coherent division of labour, not just in the context of international co-operations, within different functional units of a company, but also in mechanical development departments, the nucleus of new PD.
6. Engineer's software driven job enrichment threatens the use of modern development techniques such as overlapping of task/activities, a proven method to compress schedules, therefore the model IofAS is strongly recommended to the management.
7. Management must be aware that in limited specialist manpower environments vertical integration of tasks by specialists leads to a higher shortage of this specialists, therefore task and competence related integration of auxiliary staff is the appropriate method to be adapted to such environments.
8. Integrated software packages such as 3D CAD cannot replace the use of AS in general. Using the example of 3D CAD shows that the potential of the SW can only be exploited adequately when AS is integrated coherently in a New PD process.

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Applying knowledge: The actors of innovation in Technology-Based (TB) organizations

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Abstract

The current study discusses the actors of innovation in Technology-Based (TB) organizations. A qualitative framework were followed and the case study approach used. The findings highlight the emergence of new actors in the innovation processes: i) internally, applied research is led by a new group of entrepreneurs/businessmen: university professors and their best students, and research departments and teams; ii) externally, following the open innovation perspective, the actors identified were the mass media - as reputation builders -, universities and partnerships.

The implications of the paper are discussed: at a practical level - the social role of new R&D&I actors and organizational models; at a methodological level, linking tacit and theoretical knowledge; and at a theoretical level, presenting a conceptual framework.

Introduction

Innovation is based on the effort to build networks that promote the development of transactions and relationships, and on people sufficiently involved in their ideas by making them accepted and legitimate (Tidd *et al.*, 1997). Thus, organizations are forced to learn to cooperate in order to survive collectively (Tidd *et al.*, 1997). There are several advantages of belonging to the innovation networks (Pittaway, 2004), such as: risk sharing (Grandori & Soda, 1997); access to markets/technologies (Grandori & Soda, 1997.); and access to external knowledge (Powell *et al.*, 1996). Therefore, innovation also depends on the relationships established with other actors on the outside, which complement the organizations' actions and help them to face up to adversity and new emerging challenges. This is done by combining synergies and pooling resources and knowledge.

The externals relationships are essential for the innovation strategy. Hence, both external and internal actors of innovation are important agents for optimizing resources, which they would otherwise not achieve. Establishing social relationship networks with outside entities is fundamental, ensuring better access to knowledge, to technology and to the market, and risk-sharing. Relationships with customers, universities and other research units, investors and shareholders, partners and suppliers are critical for survival in the global world. These issues are directly related to internal policies and to the way in which organizations are structured. Following these assumptions, the question that has led this study was: *Who are the actors that have a central role in the processes of innovation in TB organizations`?*

Theoretical Frame and Model of Analysis

The literature mentions some organizational issues required in order to facilitate and foster innovation, such as: culture, strategic decisions, facilitating structures and internal processes (Burns & Stalker, 1961; Mintzberg, 1979; Kanter, 1983, 1988; Ebadi & Utterback, 1984; Rosenberg, 1982; Von Hippel, 1988, etc.). The innovation processes are subject of two types of agents: i) the drivers, which actively contribute to the innovation process; and ii) the context agents, the organizational variables which create a context that promotes innovation

in a more passive and gradual way. Based upon the literature review, table 1 presents the organizational levels according these agents.

Table 1. Innovation agents according to organizational levels

Organizational levels	Agents of Innovation	
	Driving Agents	Context Variables
Micro	Leaders, Top managers, Middle managers, Work teams	Decision and internal management processes; Communication processes: Social interactions
Meso	Strategic Departments: Human Resources; R&D; Laboratories and Research Units	Knowledge and information management; Technological determinants; Culture; Innovation climate; Resources; Structural configuration, Strategic orientation
Macro	Strategic alliances, Partnerships, Customers, Investors and Shareholders	Market and competition; Technological changes

Source: Literature review based on several authors (Rosenberg, 1982; Von Hippel, 1988; Burns & Stalker, 1961; Mintzberg, 1979; Kanter, 1983, 1988...).

Nowadays, organizations have to take into account open innovation strategies. According to Chesbrough (2003), a new paradigm has arisen: open innovation is the new way to manage innovation and R&D activities. Organizations' daily routines are balanced between external pressures and internal needs. Innovation sources may come from inside or outside the company. The role of R&D workers is both to create knowledge and capture it outside the organization. In sum, open innovation in Chesbrough's (2003) perspective is "a paradigm that assumes that firms can and should use external ideas as well as internal ideas, and internal and external paths to market, as the firms look to advance their technology". Thus, it is critical to identify the organizational boundaries in order to implement an efficient R&D&I strategy.

Innovation is also associated to the idea of reputation, prestige and visibility (Smith-Doerr *et al.*, 2004). Marziliano (2001) defends that an image is not only defined by financial success, but is, in fact, a prerequisite of success itself. A good image is essential, not only as an end in itself, but also as an instrumental means. According to the author, the company image may be a fundamental indicator if an organization wishes to survive. Gioia *et al.* (2000) argue that reputation is a collective judgment of external constituents, regarding the organization's actions, and which are relatively stable in time. It implies cumulative knowledge of the organization which comes from repeated interactions with it over time. Notwithstanding, in terms of innovation, organizations must take into consideration their image and reputation too. Otherwise, authors as Chun (2006) highlight how the degree of innovation in a company can influence its reputation. A relationship can also be seen between the success of large companies, since they are more innovative (*e.g.* 3M, General Electric, Sony, Canon), and the position they obtain in comparison to their competitors (Keller, 2003). Summarizing, a positive reputation has serious implications in several areas, as can be seen in table 2 next page).

Study Propositions

The work propositions to identify *who are the actors that have a central role in the processes of innovation in TB organizations* are below described.

Table 2. Implications of a favorable reputation for organizations

Implications	Authors
Increase in the commissions in customer bonus prices and attraction of better applicants and investors.	Fombrun and Shanley (1990)
Attraction of more employees and reduction of turnover.	IOD (1999)
Creation of positive attitudes among customers	Brown (1995)
Increase of intention to buy among customer companies.	Yoon <i>et al.</i> (1993)
Decrease in the perception of customer risk.	Ewing <i>et al.</i> (1999)
Increase in credibility.	Herbig <i>et al.</i> (1994)
Creation of greater favorable reputation in the media.	Deephhouse (1997)

Source: Chun (2006:64)

The literature stresses the magnitude of power holders in creating a culture and climate that will promote and facilitate innovation, in particular visionary leaders. These actors play a decisive role in encouraging organizational learning, serving as an example and influencing their employees in many ways (Senge, 1990; Garvin, 1993; Yukl, 1998). Leadership is particularly important in creating a culture (Schein, 1989a) that will guide the organization towards a vision (Bass, 1985; House, 1977). It is also decisive in motivating and evaluating employees, creating and reinforcing innovative behaviors (Scott & Bruce, 1994), achieving desired results, and facilitating performance and success (Yukl, 1998). It is these actors who are mainly responsible for creating a climate that fosters innovation. Pursuant to this framework the first proposition emerges:

P1: The actors who play the main role in the processes of innovation in TB organizations are the internal agents who create and apply productively knowledge, namely:

P1. 1. Founders and leaders are responsible for innovation in the organization by creating a vision that emphasizes innovative behaviors, change, risk and experimentation and by adopting organizational structures and practices which sustain this vision (Sharon *et al.*, 1997; Kanter, 1991; Schein, 1989a e b).

P1. 2. Work teams are a key of innovative organizations. The innovative and effective teams might be described as one with high levels of creativity, which develops new things (products, services, etc.) taking into account its mission and the achievement of the goals set when the team was first formed (*e.g.* Bolman and Deal, 1991; Katz, 1982; Dussauge *et al.*, 1987; Holland & Gomes, 2000).

P1. 3. R&D&I departments are the crucial element in the creation and applying knowledge (*e.g.* Cohen and Bailey, 1997; Bolman & Deal, 1991).

Pettigrew and Fenton (2000) also defend that globalized companies are those that are socially organized, working in a network spirit. Complexity is the hallmark in their new relationships, involving interdependence with other social and political entities, which is vital for their survival. The concern to develop strategic capacities that will add value to organizations' activities, such as strategic alliances, inter-companies, networking and outsourcing is also critical. Thereafter, the second work proposition has taken that condition.

P2. The actors who play the main role in the processes of innovation in TB organizations are the external agents. The meanwhile image and reputation established as successful innovative organization is a significant attractor for other innovation actors (Chun, 2006). The external actors are:

P2. 1. Knowledge centres', research units and universities are critical into innovation development (*e.g.* Eisenhardt & Schoonoven, 1996; Powell *et al.*, 1996).

P2.2. Relationships with suppliers, customers and intermediaries as well as associations, foundations, are important factors which affect innovation and productivity (Erickson & Jacoby, 2003; Pittaway *et al*, 2004)

Method and Organizational Context

The present work followed a qualitative methodology, using the case study approach, and applying the triangulation spirit (as the recommendations of Stake, 1994; and Snow & Anderson, 1991). It allows flexibility to articulate other methods and techniques, and confirm the validity of procedures, by the use of several sources in parallel. Among these sources, according to what Stake (1994) and Yin (1994) described as evidence sources, we resorted to documents, reports, archives, interviews and direct observation. In this logic, details of exploratory interviews were compared, analysis of articles in the Portuguese mass media and literature review. This comparative analysis allowed the organizations selection and the empirical field circumscription.

This evidence sources were subjected to a content analysis. This process presupposes a deductive and inferential process. Thus, inference is defined as the logic operation through which it accepts a proposition in virtue of its connection with other propositions, already accepted as true (Bardin, 1977). So, the inference is an intermediary procedure allowing the passage of an explicit and controlled way by a description (enumeration of text characteristics) to the interpretation (the meaning given to the text characteristics).

Procedures of qualitative data analysis

After selection the evidence sources, data was collected and analysis corpus was composed. These *corpus* - the set of evidence sources - was considered to be subject of analytical procedures and following some criteria of content analysis (rules, according to Bardin, 1977), namely: i) completeness (take into account all elements of the different corpus, not leaving out any of its components); ii) representativeness (tried to have the representative samples of the studied phenomena); iii) homogeneity (various information sources have a maximum homogeneity degree to allow, later, the comparison of data collection; the pre-existence of a theoretical and methodological design helped this criterion); and iv) relevance (bringing the most possible information sources to the objectives and research question).

The Coding

The coding process started by identifying: i) *the unit of registration* (UR) - the unit of meaning to be consolidated, *i.e.*, the content to be considered as the basic unit (in interviews the answers to each question were picked up and in the case of documents/press/websites the paragraph was chosen); ii) *the unit of context* (UC) - the understanding unity to codify the unit of registration, *i.e.* in order to understand the exact meaning of registration unit - in each interviews the total of questions was chosen, by script; in documents, the total of each document was chosen. This was based on the intention to make a co-occurrence analysis, which implies that the UC has a significant dimension; iii) the rule of enumeration - the counting method of UR - the UR was chosen by the presence/absence of category assessed and the number of times that it appeared in the UC (its frequency). In addition, the relative frequency was also calculated: *i.e.* the number of times that that category appeared in the UC in relation to the total number of all categories in the same UC.

The content analysis techniques resulted in two types of results: categorical and co-occurrence analysis. Categorical analysis focused on identifying and dividing the text into

registration units, which were embedded in their respective categories, previously operated by the theoretical model. Co-occurrence analysis sought to extract from the corpus the relationships between the different elements of the texts, trying to note the simultaneous presence of categories in the context units. The matrices of contingency put in evidence the common indicators in the different context units for each case. Additionally, the frequency matrices were created, which allowed a quantitative correlation with the absolute and the relative frequency of each category. Additionally, to the frequency and sources of triangulation matrices were produced graphs showing the relative frequencies and the categories presence for each context unity. This helped to visualize the categories highlighted in the cases, isolating the critical determinants for the studied organizations. This graph analysis was carried out by categories in each dimension and context units (information sources), allowing the intersection of several co-occurrence in content analysis.

Organizational Context

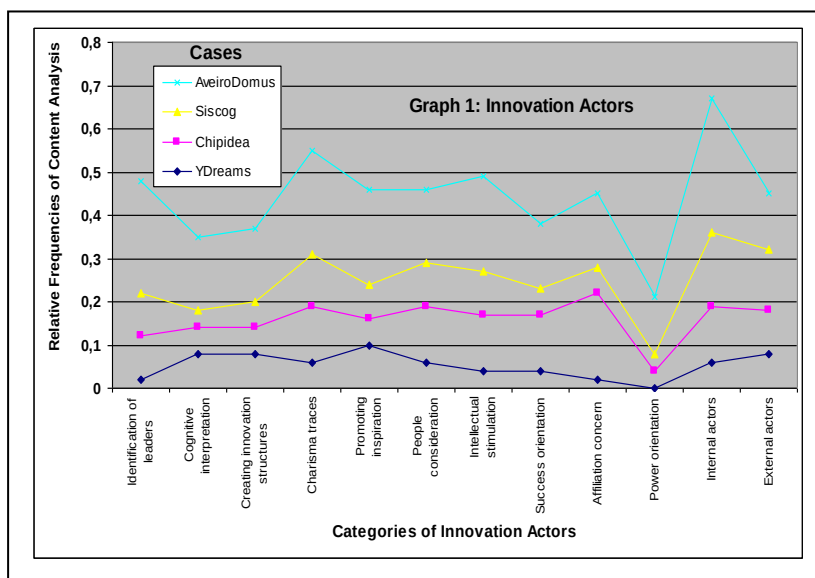
The first empirical step was to identify the most innovative Portuguese firms with international recognition. In this explorative step, key informants from academic and business areas were interviewed, and media and websites were analysed. From these data, several firms were identified as highly innovative, and three of them were chosen, namely: YDreams (computing reality and advertisement market), ChipIdea (microelectronics and chips industry) and Siscog (artificial intelligence/operational research areas), and an association - InovaDomus (development of projects for housing and habitat - “creation of the house of the future”).

The data collection started with observation of the media, over one year. At this time, these Portuguese companies were highly successful in the international markets. The media claim the several international awards due to their revolutionary scientific work and products. In this setting a significant group of TB companies has also emerged, mostly linked to a university culture of applied knowledge.

Findings

The results suggest that internally leaders and leadership, employees with passion for applied knowledge is the innovation key driver. In all the organizations the role of the founders at the beginning of projects was appointed. These organizations are founded upon the visionary capacity to transform ideas and knowledge, in areas dominated by few, resulting in successful projects. At the beginning of the life cycle, the role of the leaders-founders-mentors was a

determining factor. They were the ones who built the vision, defining the mission, setting up principles and founding values. These scientist-leaders were the strategic drivers. Furthermore, they had the sagacity to assess the context for business opportunities - a strong cognitive interpretation of the organizational realities for fostering innovation - by creating structures and gathering resources to sustain

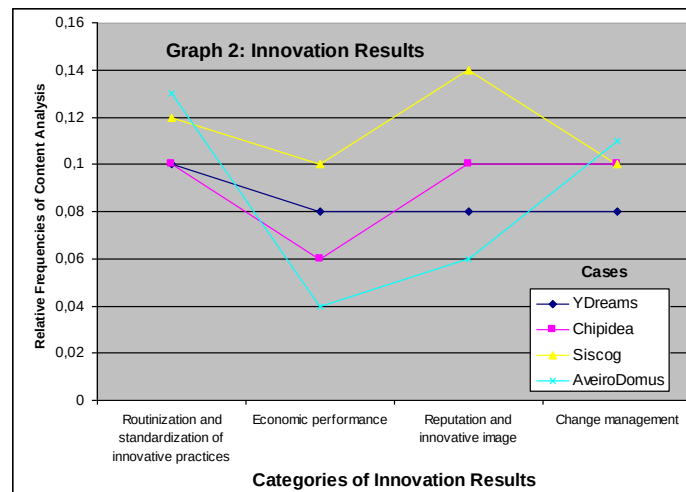


these projects. Graph 1 presents these empirical evidences.

Over time, other organizational elements, such as department directors and team-project managers, took on this role of leadership. After the test for survival and viability of these business projects of innovation, the founders gradually delegated leadership responsibilities, but they are still referred as examples and models (inside and outside of the organizations).

Externally, and related to the commercial purpose, the partners and partnerships emerge as a critical actor. The relationships built with clients-suppliers-partners are the survival factor. The connection with the academic community and research units/groups is a central element of their disruptive products. All these organizational projects are university start-ups. These business projects were born at the academic scenario. The external network developed by the founders assumes a critical role for the innovation process. In parallel, the image and the external reputation as innovative organizations promotes the attraction of talented people, new business and clients. Graph 2 enhances this context.

When inquired why innovation is so important to this organizations, three inter-related reasons can be isolated: 1) it increases economic results; 2) it helps to manage the organization's reputation and external image; and 3) it contributes towards improving the organization's adaptation. In the current study, a fourth reason is added: innovation itself - *i.e.* is also to improve the innovation processes, in a kind of virtuous circle. But all these reasons have a common ground: the companies' internal and the external innovation actors.



Discussion and Implications

Based on the previous results, it is possible confirm our work propositions (table 3, next page).

The above findings confirm the literature propositions: the founders created their groups; and because of their personalities, began to create cultures, bringing meaning to the organizational practices, influencing and, - at the same time -, being influenced by them (Schein, 1989b). Innovative behaviors were an ordinary trace in present cases. In all companies, these behaviors could be identified, as conceptualized by authors' such as Scott and Bruce (1994), and Kivimäki *et al.* (1997). Beyond the innovative behaviors, the leaders' charisma were the innovation base: their capacity to influence, inspire and trigger the intellectual stimulation of their employees; and a propensity to establish affiliative relationships - cooperation, mutual help and creation of friendship ties -, were a success determinant in innovation climates. We are dealing with charismatic and transformational leaders, as prescribed in the literature about leadership (*c.f.* Yukl, 1989; House, 1977; Bass, 1985; 1999).

Table 3. Work propositions and empirical evidence

Proposition	Theoretical Support	Empirical evidences
P1: The actors who play the main role in the processes of innovation in TB organizations are the internal agents who create and apply productively knowledge.		
P1. 1. Founders and leaders are responsible for innovation.	Sharon <i>et al.</i> (1997); Kanter (1991); Schein (1989); Scott & Bruce (1994)... Yukl (1989), House (1977); Bass (1990)	All founders had a critical role in the success of innovation practices; as well the middle managers and project managers. The leaders of innovation are university professors. Recognized scientists and highly skilled in their areas of research. Have transformed their research into successful business projects/companies.
P1. 2. Work teams are the key of innovative organizations.	Kivimäki <i>et al.</i> (1997); Janis, (1989); Nyström (1979); Abbey & Dickson (1983); Holland & Gomes (2000)	The structural design is based on the work team and projects. This way of work design was crucial to the innovation success.
P1. 3. R&D&I departments are the crucial element in the creation and applying knowledge.	Dunegan <i>et al.</i> (1992); Hurley, (1995; Cohen & Bailey (1997); Bolman & Deal (1991)	The innovation departments and research laboratories are the crucial actors of innovation, driving the creation and applied knowledge. Radical products, with focus on the new product development were the flagship of all cases.
P2: The actors who play the main role in the processes of innovation in TB organizations are the external agents. The meanwhile image and reputation established as successful innovative organization is a significant attractor for other innovation actors.		
P2. 1. Knowledge centres', such as research units and universities, are the critical into innovation development.	Eisenhardt & Schoonoven (1996); Powell <i>et al.</i> (1996)	Academic scenarios were the place where these projects began. Building networks with research centres, extending to a variety of partners was the main factor of success. The best students, the best researchers and the outstanding research centres are the main partners of the network.
P2.2. Relationships with suppliers, customers and intermediaries as well as associations, foundations, are important factors which affect innovation and productivity	Erickson & Jacoby (2003); Pittaway <i>et al.</i> (2004)	The survival of organizations due to the attraction by the success of their products. The radical nature of the products created new markets, attracting new customers, suppliers, and investors. The relationships constructed with these agents, based on trust and cooperation, allowed the continuous improvement of products and longevity of projects.

An essential social element was the organization of work into teams and projects. The work teams (which vary between specialization and multidisciplinary) are a factor that promotes the knowledge development. This is in line with the studies, which consider teams as micro-contexts, functioning as important social support in stimulating innovation (*c.f.* West, 1990; Kivimäki *et al.*, 1991). The success factors are, internally, related to the practice of people and talent management. These include: the selection of actors whose characteristics may lead to innovation and excellent performance; who also have the values advocated by the culture of these organizations.

Externally, the strategic relationships established with investors, partners, clients and/or suppliers, as well as how to select them and position themselves in the networks/relationships, are key to the success of innovation.

Lastly, the role of mass media, as diffusion entity and as reputation builders, was a critical determinant in all cases. Mass media loves those companies and their leaders. Often there were news coming out about the awards they won, their radical products, new business development and their visionary leaders. The founders and leaders of these projects know that, and took the opportunity of marketing. This was a mechanism by which attracting talent as a critical workforce, investors and partners.

Conclusion

Despite the critical context of crisis, paradoxically, and according to data from the Community for Innovation surveys, Portugal is considered the fourth country in the European Union with the highest number of innovative companies, behind only Germany, Luxembourg and Belgium; and being above in the European average (Eurostat, 2013). In addition, the Innovation Union Scoreboard (European Commission, 2013) have been rated as a moderate innovator Portugal (between 2011-2013), growing at an annual average of 5%. The main contribution for this position was the growth of the technology industry and the emergence of many TB companies with global orientation.

Portuguese TB organizations assume their founders to be the main reason for success in innovation. It was through their visions and determination that innovation gained consistency. These scientist leaders develop strong entrepreneurial abilities and construct outstanding teams. They have materialised ideas into pioneer products. They activated innovative behaviors, and were followed as an example and source of inspiration. They also have constructed special climates for creativity fostering and learning. Consequently, their followers and teams of young talents (the best students) were another factor in the success of innovation. Finally, the research investment, as well as in cutting-edge technologies, has strengthened this innovative capacity.

Externally, they share a strong connection with the university environment. All their founders are university professors and excellent researchers. This umbilical cord had strong implications at several levels: i) in recruiting young talents; ii) in applying and developing scientific knowledge, the most up-to-date possible; iii) in transferring to the realities of their company/association a unique climate of learning and hunger for knowledge, as well as in the ways of structuring the organizations and interpersonal relationships.

The innovation success, by the achieved reputation (disseminated by mass media), attract renowned customers, investors and top researchers. This promotes new scientific experiences and shared synergies, always into a spirit of applied knowledge.

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Creativity and innovation: Impact on employee performance

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Abstract

The positive relationship between innovation and employee performance is well established, but calls for a thorough investigation. It is yet unclear which mechanisms increase innovation. We suggest that the implementation of employees' knowledge can improve employees' performance; the relationship between creativity and innovation is moderated by knowledge sharing and social climate. More specifically, knowledge sharing facilitates the transformation of creativity into innovation; social climate promotes knowledge sharing by stressing important organizational culture values. This contributes to existing literature by suggesting a theoretical framework that demonstrates the mechanisms through which innovation is created and facilitated. Additionally, the results provide organizations with practical means to improve their innovation capabilities and performance.

Introduction

An organization's survival in an era characterized by rapid economic changes depends to a large extent on its innovative capability (Brennan & Dooley, 2005). Innovation in today's uncertain economic environment is viewed as a means of surviving the competition (Brennan & Dooley, 2005). Nowadays it is common knowledge that innovative firms outperform non-innovative firms in terms of productivity and growth (Hall & Mairesse, 1995). And yet, even after years of research into organizational behavior (OB) key factors, i.e. innovation and performance, much is still unclear. More precisely, the exact mechanisms through which innovation can be fostered are partial at best.

In this regard, two popular concepts are noteworthy: Human capital and social capital. It is well known that in order to innovate, an organization needs a profound and unique knowledge base. Nevertheless, it is a necessary but not sufficient condition. Even if a firm manages to accumulate knowledge, it still has to give it meaning. The social capital of a firm, i.e. the social interactions between employees helps in deciphering that information. Burt (1997) states that "...while human capital is surely necessary to success, it is useless without the social capital of opportunities in which to apply it" (p. 339). In a similar vein, Nahapiet & Ghoshal (1998) state that "...knowledge and meaning are always embedded in a social context – both created and sustained through ongoing relationships in such collectivities" (p. 253). Finally, Subramaniam & Youndt (2005) indicate that "...unless individual knowledge is networked, shared, and channeled through relationships, it provides little benefit to organizations in terms of innovative capabilities" (p. 459).

It is clear that social relationships between employees are important to innovation (Collins & Smith, 2006).

Building on this theme, we suggest that in order to exploit the knowledge base accumulated in a firm, the social environment has to allow it. The social interactions in an organization motivate employees to share their creative knowledge, and by doing so, transform it to implementable asset, i.e. innovation. Numerous studies have shown that a firm's knowledge base gains from employees' new ideas (creativity) to promote innovation (Nonaka & Takeuchi, 1995). In other words, employees' creativity lays the foundation for group-

organization innovation. We propose that it is the social interaction process of knowledge sharing (KS) that facilitates the transformation of creativity (individual characteristic) into innovation (group-organizational consequence).

Furthermore, KS behavior depends to a large extent on employees' willingness to share their knowledge with others. If a social climate consisting of cohesion, trust, team longevity, and organizational support (POS) exists in a firm, it can create the suitable environment to motivate employees to share their knowledge. The end product is an improvement in employee performance.

In the following sections we will present theory and a model that support our arguments. We conclude with theoretical and practical implications of our proposed model.

The Link between Creativity and Innovation

Creativity - definition

Creativity has multiple definitions. Farid-Foad et al. (1993) suggested that creativity "...results in the generation of new and useful ideas or the combination of existing ideas into new and useful concepts to satisfy a need" (p. 11), whereas Brennan & Dooley (2005) claimed that creativity is a combination of elasticity, originality, and thought sensitivity, allowing the individual to think outside of the box. In the field of OB, creativity is defined as the production of novel and useful ideas by an individual (Amabile, 2000).

Innovation - definition

For an idea to be defined as innovative, it needs to be developed and transformed into a product, process or service, and be commercialized (Popadiuk & Choo, 2006). Afuah (1998) classified innovation into three categories: 1. Technological- knowledge of components, linkages between components, methods, processes and techniques that go into a product or service; 2. Market- new knowledge embodied in distribution channels, product, applications, as well as customer expectations, preferences, needs, and wants; 3. Administrative- innovations that pertain to the organizational structure and administrative processes.

Creativity and innovation relationship

Creativity and innovation are related and affect an organization's ability to reach future goals. Empirical support for their relationship can be found in several studies that have employed individual factors as predictors of innovation (Pirola-Merlo & Mann, 2004). Here we hypothesize that:

Proposition 1: Employees' creativity is positively related to innovation.

Differences between creativity and innovation

Even though there are considerable differences between creativity and innovation, some use the terms interchangeably (Man, 2001). The three main differences according to West et al. (2004), Amabile (2000), and Mathisen et al. (2008) are: 1. The nature of the process- West et al. (2004) refer to creativity as an individual's cognitive processes, and innovation as a social process; 2. The element of implementation- Innovation includes an element of implementation, but creativity does not; 3. Unit of analysis- Mathisen et al. (2008), Amabile (2000) and Staw (1990) indicate that creative performance refers to products and ideas at the individual level. Individuals are not defined as innovative, but rather as more or less creative. Innovation is the successful implementation of these products at the organizational level.

Innovation and Performance

Innovation can be valued in terms of its organizational outcomes. Previous studies have shown that innovation that was exploited in an organizational setting can contribute to performance improvement (Shalley, Gilson, & Blum, 2000), and that innovative firms outperform non-innovative firms in terms of productivity and growth (Hall & Mairesse, 1995).

While the team is working on new projects and implementation of creative ideas, the motivational influence on team members can contribute to the performance of the employee (Soda & Bizzi, 2012). Such a state reinforces the benefits of creativity and creates enthusiasm justifies more effort and as a result, leads to more success (Amabile, 2000). Engaging in activities that were never done before creates an intellectual challenge for individuals and they react to the generated stress by increasing the effort exerted to meet the demands (Amabile, 2000). Similarly, team climate perspective (West & Anderson, 1996) further notes that when team members feel they are engaged in the exploration and/or development of new ideas that have not been applied in the past, a positive team climate is developed that motivates efforts by team members to give more. Thus, we hypothesize:

Proposition 2: Innovation relates positively to employees performance.

Moderators of the Link between Creativity and Innovation

Knowledge sharing - definition

There are different definitions of knowledge sharing; here it is defined as a social interaction involving the exchange of employee knowledge, experiences and skills through a department or organization (Lin, 2007). According to Van den Hooff & Van Weenen (2004), knowledge sharing is a bi-dimensional process that involves knowledge collection and knowledge donation. Knowledge collection is a process of consultation with others that is intended to encourage them to share their personal intellectual capital. Knowledge donation is a process in which individuals give their personal intellectual capital to others. Knowledge sharing occurs between employees, at the group or organizational levels.

Types of knowledge

Based on Polanyi (1958, 1966), Nonaka (1994) differentiated explicit from tacit knowledge in the following aspects:

1. Sharing explicit knowledge can be promoted by information technology whereas tacit knowledge is subject to social interaction (Nonaka, 1994).
2. Explicit knowledge is often in documentary form and is transferred by technology, unlike tacit knowledge that is embedded in social ties; its transfer is varied, but is usually done by direct contact and observation of behavior (Nonaka, 1994).
3. Explicit knowledge can be reduced to writing easily. It is impersonal by nature, obtained through education and formal practice, and is usually in the form of reports and documents, etc. (Holste & Fields, 2010). Tacit knowledge is personal (i.e., abilities, developed skills, etc.) and cannot easily be reduced to writing.
4. Tacit knowledge is acquired by learning through life experience, experimentation and learning by doing (Mascitelli, 2000). This knowledge is described as local, and is strongly rooted in the context in which it developed (Holste & Fields, 2010). Explicit knowledge is not acquired by learning or experience, and is not bound to context.

Knowledge sharing as a social exchange

The way to conceptualize the relationship between an organization and its employees is based on the social psychology perspective of Social Exchange Theory (Blau, 1964). Social Exchange theory has been shown to account for non- contractual interactions between people in a vast number of domains ranging from market relations, work relations and love (Blau,

1964) to team knowledge sharing (Cummings, 2004). The theory postulates that people donate to others in a manner commensurate to what others give to them (Reychav & Weisberg, 2010). The theory sees the “donations” people give to an organization as elements in a mutual arrangement (Gouldner, 1960). Mutual agreements take place when an individual performs an act that benefits some other individual, group or organization. This gesture is made without a specific monetary contract guaranteeing that it will be rewarded (King & Marks, 2008). The person who makes the gesture does so because s/he believes that it will be rewarded in the future, although the exact time and nature of the reward is unknown and unimportant (Van der Vegt & Janssen, 2003). In social exchanges, unlike economic ones, the possible outcomes of behavior are based on the belief that the relationship will be conducted according to previous behavior (King & Marks, 2008). Numerous studies have emphasized the link between social exchange and positive outcomes in organizations (King & Marks, 2008).

Knowledge sharing as a mediator between creativity and innovation

There is a general consensus that creativity is a necessary but not sufficient prerequisite for innovation. The innovation process builds upon knowledge sharing and is affected by group dynamics and organizational support (Agrell & Gustafson, 1996).

The process starts with individuals who come up with an idea or recognize an organizational problem (Farr & Ford, 1990). These individuals decide whether or not to share knowledge and suggest their novel ideas to the group for discussion and development (Agrell & Gustafson, 1996). Kogut & Zander (1992), as well as Nahapiet & Ghoshal (1998) argue that process of knowledge sharing helps create valuable knowledge within firms by connecting previously unconnected knowledge and ideas or recombining existing knowledge into novel one. That is to say, for creativity to be exploited for the benefit of the group and the organization, employees need to share their creativity. Thus, we hypothesize:

Proposition 3: Knowledge sharing mediates the relationship between employees' creativity and innovation.

The role of social climate in facilitating knowledge sharing behavior

Collins & Smith (2006) define social climate as "...the collective set of norms, values, and beliefs that express employees' views of how they interact with one another while carrying out tasks for their firm" (p. 547). In other words, social climate of a firm refers to its employees shared beliefs regarding the norms that guide their interactions when they work (Ashkanasy, Wilderom, & Peterson, 2000).

Davenport & Prusak (1998) argue that knowledge is personal and private. As a result, motivating people to share is a difficult task (Caldwell, 2004). In order for exchanges to occur, organizations need to create the right conditions for people to be willing to share their knowledge (Camelo-Ordaz et al., 2011). Social climate can promote knowledge sharing.

Based on Kang et al. (2007), we argue that a social climate characterized by cooperation encourages employees to focus on the best interest of the firm rather than on their own self objectives thus fostering knowledge sharing among employees. Cohesion, for instance, facilitates the formation of strong and close ties between employees which motivate them to share their unique and valuable knowledge with their colleagues and organization (Reagans, Zuckerman, & McEvily, 2004). In addition, a work environment that employs trust and teamwork tends to emphasize a sense of collectivity (Zhou, Hong, & Liu, 2013). This should lead to more knowledge being transferred freely (Moran, 2005). Team longevity assures that in time, team members create communication codes and protocols that improve the

communication between employees and ease the transfer of knowledge (Nahapiet & Ghoshal, 1998). All of the above can facilitate knowledge sharing and by doing so promote innovation.

Social Climate Components

Cohesion

Over the years several definitions have been suggested to the 'elusive' concept of cohesion (Mullen & Cooper, 1994). Despite differing opinions, there is a general agreement among scholars that cohesion is a group level variable (Gully, Devine, & Whitney, 1995) and they have used Festinger's (1968) definition: "...the total field of forces that acts on members to remain in the group" (p. 185).

At first, researchers referred to cohesion as a unidimensional concept (Seashore, 1954), but later on an understanding emerged that cohesion includes both task and social components, marking a shift towards multidimensional conceptualization of cohesion (Cota, Evans, Dion, Kilik, & Longman 1995). The well accepted multidimensional conceptualization of Carron, Brawley, & Widmeyer (1998) includes four dimensions:

1. Individual attraction to group-task: Team members' perceptions of their involvement in a group task.
2. Group integration-task: Team members' perceptions of the similarity, closeness and bonding that exists in the group, in the context of a collective task.
3. Individual attraction to group-social: Team members' perceptions of their acceptance by the group and their social interaction with the group.
4. Group integration-social: Team members' perceptions of closeness and similarity in the group, in a social context.

An organizational climate emphasizing cooperation can facilitate the consolidation of team members' social ties and a sense of belonging (Hulsheger, Anderson, & Salgado, 2009) thus leading to the attainment of the social component of cohesion. It can also strengthen team members' commitment to work together and drive them to focus on team's success and achieving shared goals and objectives rather than individual aspirations as a means to receive desired rewards (DeMatteo, Eby, & Sundstrom, 1998), thus minimizing the occurrence of social loafing (Sheppard, 1993) which leads to the attainment of the task component of cohesion.

Cohesion and knowledge sharing

When cohesion is high, employees are likely to cooperate with one another and to abandon competition thus leading to increase in their tendency to share knowledge (Szulanski, 1996). Also, when cohesion exists, individuals experience a positive psychological state. This state leads to perceiving things in a positive way and to increasing the propensity for pro-social behavior (George & Brief, 1992). Increased cohesion is expected to lead to a greater willingness on the part of team members to help each other and to demonstrate altruistic behavior; i.e., OCB such as knowledge sharing. Thus, we hypothesize:

Proposition 4: Cohesion is positively related to knowledge sharing.

Trust

Trust is a psychological construct, the experiential outcome of interactions between people's values, attitudes, mood and emotions (Jones & George, 1998). It is the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will not misuse this act (Mayer, Davis & Schoorman, 1995). According to Mayer et al. (1995), trust is based on three components: Ability (trustor's belief that the trustee is capable and skilled),

benevolence (the intention to do good for the other), and integrity (trustor's belief that the trustee is guided by values of fairness).

Social climate that values cooperation can facilitate climate of trust between employees by aligning employees' actions with the team's or firm's objectives and thus fostering a mutual dependence on one another, while also insuring that everyone contribute, thus reducing social loafing (Lawler, Mohrman, & Ledford, 1995).

Trust and knowledge sharing

Trust lays the foundation for effective social exchange (Blau, 1964), and can influence knowledge sharing. Social exchange depends to a great extent upon trust, because it involves undefined commitments that cannot be forced (there is no written contract). When trust is high, knowledge sharing should be enhanced because mutual trust between employees enhance a person's belief that current exchange will lead to later reciprocation (Coleman, 1990). Trust finds expression in knowledge sharing because knowledge seekers must let themselves be vulnerable to colleagues, by acknowledging, for instance, their lack of knowledge in a specific domain (Gray, 2001). Further, they need to trust colleagues to supply credible and beneficial information (Gray, 2001). Similarly, knowledge donors need to believe that the information will be used properly. Thus, we hypothesize:

Proposition 5: Trust is positively related to knowledge sharing.

Team longevity

Longevity can be defined as the time period in which firm or group members have worked together (Pelled et al., 1999). After a period of working together, team members become accustomed to the presence of others. Thus, a team/group identity is formed, group members become "my team" (in-group category), while other work teams become "not my team" (out-group category) (Tajfel, 1978). An organizational emphasize on the values of cooperation help in the exposure of employees to their colleagues.

Team longevity and knowledge sharing

As team members work together for some time, they interact. When a group identity is formed, team members feel safe to communicate, and knowledge sharing will occur. Thus, we hypothesize:

Proposition 6: Team longevity is positively related to knowledge sharing.

Perceived organizational support (POS)

According to Organizational Support Theory (OST) (Eisenberger et al., 2001), employees tend to ascribe humanlike characteristics to an organization and see it as a subject with the ability to act. The organization is perceived as responsible for the way organizational jobholders treat employees (Eisenberger et al., 2001). Employees develop high levels of perceived organizational support (POS) when the organization is attentive to their well-being and values their contribution, by giving rewards, better work conditions, maintaining procedural justice, etc.

We believe that when an organization promotes cooperation, it is communicating to employees that they are appreciated and valued, thus causing them to percept the organization in a positive manner and act in ways that benefit the organization.

POS and knowledge sharing

Organizational support indirectly affects employee attitudes and behaviors through the creation of a sense of commitment, which results in reciprocity. When employees feel

supported, they develop a greater global sense of commitment to the organization. Employees feel obligated to 'return the favor' by helping the organization reach its goals (Eisenberger et al., 2001). Organizations depend on the creation of new ideas that arise from sharing, and the application of knowledge in one domain through implementation in another, a process that is facilitated by knowledge sharing (Bartol et al., 2009). Knowledge sharing is usually a choice and is a beneficial behavior that is not a formal job requirement (Bartol et al., 2009). Research supports the notion that organizational support contributes to these kinds of behaviors (Podsakoff et al., 2000). Thus, we hypothesize:

Proposition 7: POS is positively related to knowledge sharing.

Discussion

In the modern economic reality, a firm must demonstrate that it is capable of versatility and ingenuity on a regular basis in order to remain a leading force in the market (Brennan & Dooley, 2005). Despite considerable evidence gathered thus far supporting the existence of a positive relationship between innovation and performance, much is still unknown. The literature does not present a clear picture of the ways to facilitate innovation. We build upon existing OB literature to point out the important role of the social environment of an organization and the power of the social fabric (Burt, 1997). We proposed a conceptual model (Figure 1) that illustrates that knowledge of an individual (creativity) can be transformed into a practical organizational commodity (innovation) which ultimately leads to performance improvement. More specifically, we suggest that a social process of knowledge sharing mediates the link between creativity and innovation and also that social climate promotes knowledge sharing. We argue that an organizational climate emphasizing the value of cooperation (cohesion, trust, team longevity, and POS), helps to drive employees to share their knowledge to the benefit of the organization. We believe that our model answers some fundamental questions regarding the accumulation and use of knowledge in firms, while also providing a foundation for future research on the evolving field of knowledge sharing and the concept of social climate and its constituting elements.

The practical implications of our model are considerable. We provide managers and organizations with the means to improve their innovative capability and performance. Effective implementation of the proposed model can exert an enormous influence over both human capital and social capital, the later being extremely important to firms' innovation (Collins & Smith, 2006). They can improve the exploitation of the existing knowledge base by fostering social interactions and by creating the "right" climate to motivate employees to contribute, thus providing the firm with invaluable tools to succeed in an ongoing struggle to survive in a difficult economic reality (Grant & Berry, 2011).

Although very promising, this is still a conceptual paper. The next step is to test the model empirically. In this regard, it is important to bear in mind that our model may better apply to high tech firms. It is believed that the type of employees that form the backbone of hi tech firms, and therefore are the most important for creating a competitive advantage, are knowledge workers, i.e. scientists, engineers etc. (Grant, 1996). As mentioned above, firms' innovative capability and improved performance are based on employees' knowledge and willingness to share it. Knowledge workers hold the key to this kind of rare, valuable, and inimitable knowledge. In line with this argument, Appelyard & Brown (2001) found that engineers, more than line workers, contributed to the success of semiconductor firms.

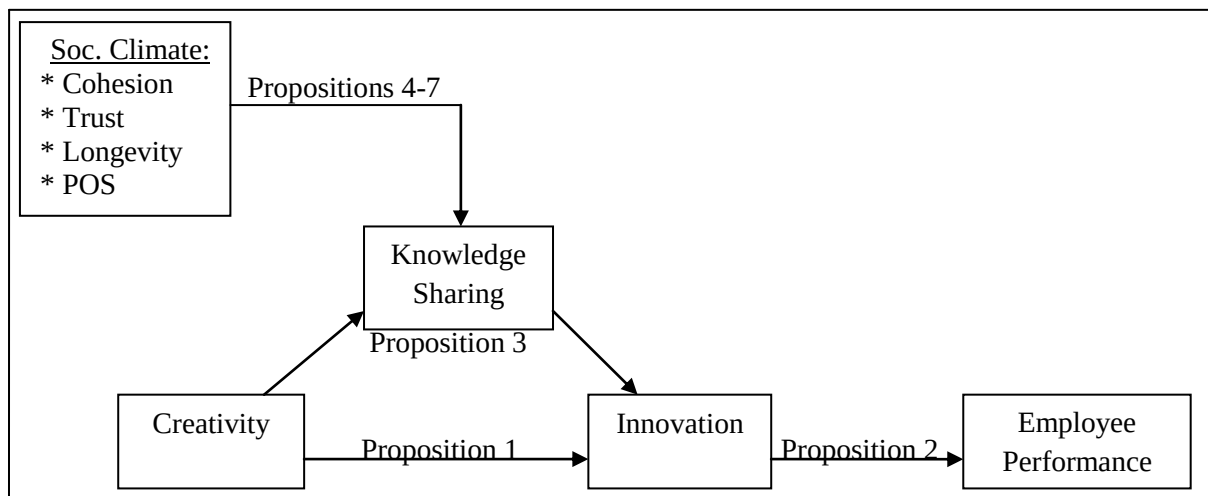


Figure 1. Conceptual model: The link between creativity and innovation and its impact on performance

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How changes in organization behaviour affect outcomes for external sourcing of complex knowledge

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Abstract

There is evidence that firms experience serious problems when they attempt external sourcing of complex knowledge (e.g. Financial Times 2009). Failures in organization behaviour may play a significant and under-researched role in external-sourcing outcomes (e.g. Manning et al., 2008). This paper explores how interdependent changes in organization and job design affect external sourcing for complex new-product development (NPD). The study indicates how individual boundary spanners can effectively support external sourcing for complex knowledge provided their work is in turn supported through project-level organization design interventions.

Introduction

The ability of firms to develop and exploit technological know-how through new-product development (NPD) is an important aspect of competitiveness in many industries. In-house sourcing of know-how has always been viewed as significant to successful NPD (Mowery, 1983). But external sourcing is particularly appealing for organizations developing complex, i.e. multi-technology, products because the high and diverse requirements for knowledge and other resources necessary to developing these products strain the capabilities of even very large firms – for example, jet aircraft or car producers (Hobday et al., 2005; Ro et al., 2008).

External sourcing of know-how relates especially to the upstream activities of NPD (i.e. conceptual development and detail design). For complex NPD, external sourcing of know-how confronts two significant obstacles: the work is characterized by numerous complementary task performances i.e. superior outcomes result from closely coordinating the simultaneous performance of uncertain design tasks (Novak and Stern, 2009; Marengo et al., 2000), and yet the firms involved (i.e. buyer and suppliers) will be formally autonomous of each other.

Though there exists a considerable literature on the outsourcing of parts-production (i.e. down-stream activities), this research is of limited relevance to outsourcing knowledge-intensive design (i.e. upstream) activities: downstream stages of component production are more easily executed as well-structured, interdependency-minimizing modular problems (Baldwin and Clark, 2000; Manning et al., 2008).

In complex NPD, design engineers will typically be part of a cross-functional team working on each subsystem (e.g. “engine” or “electrical system”). While each team will face within-team integration needs, the real integration challenge will be at the team boundary. Each team will need to balance the technical demands from other subsystem teams in addition to performing design tasks specific to their own subsystem. The parties face the challenge of sharing and assessing knowledge at the team boundary without fully knowing what needs to be known nor who needs to know what. Optimal design choices emerge through teams’ executing in parallel and by continuously and reciprocally relying on preliminary information from each other and which they iteratively refine (Sosa et al 2004; Terwiesch, Loch & De Meyer, 2002).

At least three distinct modes of knowledge-boundary management can be associated with these tasks. *Standardized information exchange* reduces incidences of time-consuming ambiguity in technical exchanges, and so greater certainty is experienced and exchanges proceed more efficiently (e.g. Monteverde, 1995). But in the upstream activities for complex NPD sufficient novelty is present to generate differences and dependencies which are unclear and leading to differences in interpretations across the team boundary (Carlile, 2004). *Joint action across the boundary* is necessary to developing the shared meanings by which the parties can represent the differences and dependencies of consequence. Finally, and especially in a context of formally autonomous actors (i.e. buyer and supplier firms), knowledge held by or developed by one party is threatened by that held by or developed by another party because of the time and resources needed to acquire and advance localized bodies of knowledge and practice: the parties therefore will need to be able *negotiate their interests* through mechanisms that allow them to jointly transform their knowledge.

I examine knowledge-boundary management activities using a case study of external sourcing for jet-aircraft NPD. I show how changes in the work design of linking individuals related to organization–design interventions that promoted standardization and teaming. The different modes of knowledge-boundary management targeted the “localizing” of project administration knowledge and technical knowledge (establishing the local usefulness of the administrative and technical knowledge to the work by the subsystem-supplier team) and the “globalizing” of technical knowledge (establishing the design completeness of a given technological subsystem for sharing outside the given subsystem team). Localizing and globalizing were each dual practices of knowledge formation and exchange that ultimately addressed the interests of buyer and supplier firms by continually refreshed how subsystem design work was being expressed administratively.

Overall, I suggest that external sourcing is as much an organization-design problem as it is a governance or knowledge problem. The study indicates that outcomes for external sourcing for complex knowledge depend on deploying organization design to align a changed conception of the role of the firm in its value chain with changed work practices of its knowledge workers.

Method

Survey-based research is too indirect a method to examine knowledge and work practices. But an in-depth case study is well suited to phenomena that require direct study and which appear to be poorly understood (Yin, 2003). The study draws on real-time observation and interviewing. The project was organized into six phases; data collection began prior to Phase 1 and continued through Phase 2, for a period of about fifteen months. These were the two key phases for knowledge formation and exchange: by the end of Phase 2 the designs for the aircraft and all of its subsystems were to be complete. A grounded-theory approach (Strauss and Corbin, 1990) is applied in the analysis of the data.

Results

For complex products such as jet-aircraft the project-organization design is expressed in the allocation of people and other resources into teams on the basis of subsystem-technical expertise inferred from the product architecture (e.g. engine team, wing team, etc.). Each of the fifteen suppliers provided a distinct subsystem (e.g. avionics, wing) and each sent a

portion of their design team on site at the start of Phase 1 (this represented a foreign assignment for almost every supplier).

Phase 1: The design objective of Phase 1 was a first-cut at the architecture for each subsystem, and including indicative interfaces, reliability, maintainability, and weight specifications. This work required each supplier's translating the design envelope for the aircraft (developed internally by an AeroCo "advanced-design" team) into a feasible top-level proposal for each subsystem called the "[Subsystem] Technical Requirements Document" (TRD). In addition to generating the TRD, a related major objective of Phase 1 was to have in place a *harmonized schedule* of tasks across all suppliers.

Standardizing: The TRD and the harmonized schedule were expressed in what was called the [AeroCo] Engineering System (AES). This organized the flow of design outputs (such as schematics, technical reports and digital drawings) into the six phases of the AeroCo NPD process and into twelve milestones demarcating design-evolution reviews for all subsystems for the four years of the project. AeroCo ran workshops to facilitate suppliers' adaptation to the AES, schooling them early in each Phase on design requirements, procedures, and formats to be utilized during that phase.

Scheduling targeted the timely formation and sharing of knowledge. Each supplier had to maintain a detailed subsystem schedule (per an AeroCo template) for its design, procurement, and manufacturing activities, and including all of the AES deliverables. The format of every design deliverable was standardized by AeroCo across all subsystems. All suppliers' digital models had to be executed in a common software. Use of the digital model was governed by a standardized AeroCo methodology composed of one-hundred-and-fifty design standards, across sixteen categories, such as model geometries (tolerances, maximum size etc.), drafting conventions (line thicknesses, text size etc.), and layer conventions (such as on what level of the digital model subsystem elements should be located). Access to the digital model was possible through workstations located both on-site and at suppliers' remote sites.

The digital model was integrated with other databases. A centralized "action items" database (i.e. formal directives from AeroCo to a supplier or vice versa, and also from supplier to supplier) tracked problems of part identification, or problematic interfaces between parts revealed by querying the digital model. The correct identification of every one of the many thousands of parts – vital to coherent decision-making – was assured via AeroCo's assigning a project-specific code to every one via a parts-nomenclature database.

Phase 2: The design objectives of Phase 2 were defining interfaces between all subsystems, advancing digital models through a third formal iteration, and second-stage completion of electrical schematics and certification-compliance reports. This evolution in design detail required an intimate understanding by each subsystem team of how their subsystem related to other subsystems. Therefore, while Phase 1 emphasized the fit of subsystem-to-overall-aircraft specifications, in Phase 2 intensive knowledge sharing about inter-subsystem fit came to the fore. Intensive interaction was necessary to specify how a given subsystem should interact with another in this *particular* aircraft design: past design choices could not be relied upon. The work still had to conform with the AES such that the evolving design could be easily availed of by any other subsystem-team or AeroCo personnel and such that all the design work cumulatively integrated into a stable aircraft design.

Interacting: Each supplier’s team was assigned an AeroCo-staffed liaison position – the “[subsystem] integrator”. This was a review and liaison role with limited formal authority; all integrators were former AeroCo engineers. Each integrator had the specific responsibility of facilitating design compatibility with all other interfacing subsystem designs, and bearing in mind overall aircraft performance needs. The integrator liaised with other suppliers and AeroCo functions to manage the flow of information into and out of the team.

My inferences about the job design of the integrators are presented in Table 1. I identify two broad activities to constitute this job, “localizing” and “globalizing”. These are activities of knowledge-boundary management which are distinguished by their orientation to the team boundary i.e. inward or outward directed, and by the emphases in how they were performed across each of the two Phases.

Role	Core activity	Addresses coordination through...	Knowledge-boundary management by...
PHASE 1			
Localizing: administrative information sharing (inward)	Set out the particular set of “design rules” within which any given supplier should apply their design skills	Administrative alignment: Customize AES to project, and then to each subsystem	Information-sharing (of standardized administrative information i.e. AES)
Localizing: administrative to technical transformation (inward)	Guide supplier work-process adaptation to AES	Administrative alignment: customize supplier work pace to project time frame	Negotiation (of application of harmonized schedule to supplier’s design work: future-phase oriented)
Globalizing: technical to administrative translation (outward)	Populate centralized database to capture flow of (architectural) design information out of the team	Technical alignment (architectural): customize subsystem architecture to project	Joint action (on the basis of standardized administrative information and customized technical information)
PHASE 2			
Localizing: technical to technical translation (inward)	“High resolution feedback” to supplier	Technical alignment (interfaces): customize subsystem to interfacing subsystems	Joint action (on the basis of customized technical information)
Localizing: administrative to technical transformation (inward)	Monitor supplier adaptation to AES	Administrative alignment: maintain supplier work pace to project time frame	Negotiation (of application of AES to the supplier’s design work: present-phase oriented)
Globalizing: technical to administrative translation (outward)	Maintain centralized database to capture flow of (interface) design information out of the team	Administrative alignment: on-going expression of design work in AES terms	Joint action (on the basis of standardized administrative information and customized technical information)

Table 1. The work design of AeroCo integrators

“Localizing” seeks to support the local, or intra-team, application to design tasks of both administrative (i.e. AES-based) information and technical information. In Phase 1 this activity emphasized information sharing (to achieve a common syntax for the expression of work), and negotiation (to realize the common interest of every supplier’s adapting to the AES). In Phase 2, this activity emphasized joint action (to determine the technical specifications to resolve interdependencies between subsystems) and negotiation (to safeguard the common interest by addressing lapses in or modifications to a supplier’s adaptation to the AES).

“Globalizing” seeks to support the project-wide, or extra-team, application to design tasks of both administrative (i.e. AES-based) information and technical information. In Phase 1 this activity emphasized joint action (to determine the technical specifications of the subsystem architecture and to express these in AES-based terms). In Phase 2, this activity similarly emphasized joint action but in order to determine the technical specifications of interdependencies between subsystems and to express these in AES-based terms.

Localizing and globalizing continually re-freshed how subsystem design work was being expressed administratively. Early in the process of knowledge generation and exchange integrators’ activity emphasized sharing administrative knowledge. This is because early in the process integrator and supplier can fully know what needs to be known (AES deliverables) and who (a given supplier) needs to know what. They can therefore adequately share and assess their different knowledge so that differences and dependencies may be well specified. But merely sharing information across knowledge domains leaves unaddressed the significance of shared understanding and shared interests to knowledge management across these domains (Carlile 2004; Levina and Vaast 2005). In Phase 1 integrators negotiated mostly future-oriented adaptation to the AES by suppliers, but increasingly emphasized present-oriented adaptations in Phase 2 as lapses or contingencies were revealed. Suppliers, being vested in their own established ways of working, bore these costs of adaptation. As Phase 2 progressed the work became more intensively defined by inter-subsystem interdependencies. By this time, suppliers were becoming increasingly vested in design decisions already made, compounding the costs of adaptation. Differences and dependencies were more difficult to specify and required much more direct interaction to generate shared understanding of how to do so. On the one hand, the technical needs of any given subsystem needed to be expressed in design choices for an inter-dependent subsystem (“technical-to-technical” translation). On the other hand, having negotiated what these should be and necessary adaptations to achieving them, the outcomes had to be expressed in AES terms so that they could be made definitive i.e. sufficiently stable and certain information that could be made available to the project as a whole. Thus, “globalizing”, is the iterative sharing at the project level of knowledge resulting from joint action and negotiation at the subsystem level.

An organization design for knowledge exchange: The AeroCo project-organization design retained subsystem-based teaming as the basic organizing choice (though populated by supplier personnel). But there were pervasiveness changes in how these decision units linked to each other compared to prior to external sourcing. The linkages from every subsystem team were no longer part of a single organization hierarchy; they were also significantly less engineering-centric than when Phases 1 and 2 were mostly in-house with every team now linking to a variety of functional units, notably AeroCo procurement and AeroCo PP&C (project-planning and control).

The formalization expressed in the AES provided the basis for an expanded role for PP&C, charged principally with managing compliance with the harmonized schedule. This structural differentiation has reinforced the distinction between design as a technical exercise (performed significantly by supplier personnel) and design as an administrative exercise (performed significantly by AeroCo personnel). The role of procurement within AeroCo, charged with managing contract conformity, has significantly expanded also and has resulted in design as a technical exercise being much more sharply distinguished from design as a cost-based exercise.

Not only was this an organization design constituted of many cross-organizational linkages; these same linkages implied that differentiated AeroCo decision units now had significant stakes in the work of the subsystem teams. Within AeroCo, day-to-day design work was now subject to negotiation across procurement, PP&C, and engineering functional boundaries. Cross-functional negotiation was organized through much more extensive cross-functional teaming within AeroCo, and culminating in a director-level cross-functional product-development team's now being the pre-eminent decision-making unit.

Discussion

Recent trends in NPD practice have emphasized external sourcing at the subsystem level i.e. where each of a small number of suppliers is assigned design and procurement choices regarding many (perhaps hundreds) of tightly coupled components, effectively aggregating many individual contracting decisions to the subsystem level (e.g. "entire engine") (Novak & Stern, 2009; Ro et al., 2008).

AeroCo's development process had become significantly more formalized (as the AES); the common syntax for information exchange that such a process presumes targets reduced differentiation (Monteverde, 1995). Each supplier now had to understand and manage task dependencies both internal to their subsystem and across subsystems (e.g. securing mutual authorization of design specifications for shared interfaces). In order for suppliers to reliably apply and exchange their technical knowledge in the project they had to acquire and use this administrative knowledge. AeroCo's project-organization design has become significantly more cross-organizational and cross-functional due to increased external sourcing. The interactive diversity that such a design presumes targets increased integration (Lawrence and Lorsch, 1967).

But both such project-level organization-design interventions were made real for each supplier team through the agency of the integrators. Integrators had to re-conceive their work role as being defined by the changed vertical relationship: much more design management, much less design work. They acted to express in their roles the two broader organization-design interventions which were standardizing-oriented and interaction-oriented. Integrators' activities of localizing and globalizing created a new joint field (Levina and Vaast, 2005) spanning buyer and suppliers that indexed technologically-distinct subsystems (e.g. avionics or wing) and an administratively-common management system to align knowledge needs with task execution.

Conclusion

Changes to work design are intrinsic to changes in organization design (Barley and Kunda, 2001). There is a long research tradition focused on the roles of individuals who act as

boundary spanners across differentiated knowledge domains (e.g. Allen, 1977). But such liaison roles are prone to being undermined by role conflict rooted in cross-domain tensions (Friedman and Podolny, 1992) and to the marginalization of boundary spanners (Galbraith, 1993). This study indicates the significant changes to job design and organization design needed for effective external sourcing for complex NPD. A concerted approach to design intervention at the project (“global”) and subsystem (“local”) levels enables the knowledge-boundary management activities of individual boundary spanners.

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Comparative analysis of funding structure of the sector of high technology in the Baltic States

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Abstract

The present study represents a test of a conceptual model predicting how the structure of funding might influence country's performance developing sector of high technology. Using the framework provided by Triple helix theory and Eurostat suggested methodology, this model assesses whether aspects of the funding structure may have a positive effect on country's performance developing sector of high technology through their influence on sector's, business, national and international levels of evaluation: number of patents, number of innovative enterprises, turnover of high technology trade and share of high technology in national export. The result indicates that the theoretical framework can identify specific leverage points that can increase efficiency of funding structure and, therefore, productivity of the sector of high technology.

Introduction

For over two decades, scientific scholars have highlighted a need for an improved understanding of the processes of high technology development (Bresnakan & Trajtenberg, 1995; Park, 2001; Bozkaya, Romain & Potterie, 2003; Belitz, Edler & Grenzmann, 2006). Unfortunately, while international challenges developing sector of high technology is one of the most frequently discussed topics (Rudzki, 1995; Passera, 2004; Teichler, 2004; McIntyre, 2005; LiPuma, 2006; Solberg & Durrieu, 2006; Marginson & van der Wende, 2007; Ackers, 2008; Mohrman, Ma & Baker 2008; Watt, 2009), it continues to receive only limited attention on national scope. Admittedly, sector of high technology is a difficult concept to define or study (Feinson, 2003; Gornitzka & Langfeldt, 2008; Mayer & Ottaviano, 2008; National Science Foundation, 2009), and no single comprehensive theory of high technology development currently exists. Nevertheless, theoretical advances have been made that can assist the efforts in understanding the specific processes developing sector of high technology. In particular, there is a growing consensus that any model explaining processes of high technology development should be based on cooperation of three elements: academia, providing main knowledge and producing skilled specialists, industry, implementing ideas in practice, and, government, responsible for financial funding and support (Boyer, Arnalble & Barre, 1999; Casas, de Gortari & Santos 2000; Etzkowitz, Gulbrandsen & Levitt, 2000; Viale & Campodall'Orto, 2002; Marton, 2006; Cornford & Navarra, 2008; Wessner, 1999).

The observation regarding financial funding and governmental support due to importance of the sector of high technology, however, is not new. The reasons are following:

- Technology enhances cost optimisation and processes of activity coordination, and decreasing costs increase productivity (Bresnakan & Trajtenberg, 1995);
- Technology allows to offer new products or services to the market, emphasizing easy to use, time saving, quality and other advantages (Vernon, 1966; Sahadev & Jayachandran, 2004; Brynjolfsson, Dick & Smith, 2010);
- Technology leads to positive change not only internally, but also externally (*spillover-effects*), which promotes faster knowledge exchange (Roemer, 1997);

– Technology promotes experience, knowledge and technology exchange between different industries, which increases variety of production (Welfens & Vogelsang, 2008).

The present study contributes to the understanding of importance of funding structure by testing a conceptual model predicting how the goals of expenditure might influence results developing sector of high technology. In particular, using the framework provided by Triple helix theory and Eurostat suggested methodology, this model tests whether characteristics of financial funding, such as overall expenditure on research and development, expenditure of national budget on social and economic needs, share of expenditure on business enterprise sector, share of expenditure on government sector, share of expenditure on higher education sector, size of research and development personnel, size of human resources in science and technology, may have a positive effect on country's performance developing sector of high technology through their influence on three important levels of evaluation: number of patents reflecting sector's capacity, number of innovative enterprises reflecting business capacity, turnover of high technology trade reflecting national capacity and share of high technology in national export representing international level of high technology development. The model was tested on example of the European Union and in the Baltic states in particular. The resulting empirical support for this conceptual model provides a strong theoretical framework for future research on high technology sector development that may identify specific leverage points that can improve country's performance.

Theoretical framework

Michael Porter described perfect location for a new high-tech enterprise as a geographic concentration of related companies, specialized suppliers, service providers, related industry sector companies and associated institutions in a given area, which will compete and cooperate with each other (D'Avenie, 1994). Such concentration of the business groups facilitates the adoption of customer financing and sources of expertise, qualified staff and necessary materials. Recently, the modern economy countries, particularly European Union and the United States, are stimulating cooperation between universities, industry and Government in the way of the Triple helix model.

The Triple helix model of high technology is a spiral model of innovation that captures multiple reciprocal relationships at different points in the process of knowledge capitalization (Etzkowitz, 2002). The model consists of three autonomous helices and determinates processes related to innovation and high technology development by cooperation between academic society, public institutions and the business sector. The first dimension of the Triple helix model is internal transformation in each of the helices, such as the development of lateral ties among companies through strategic alliances or an assumption of an economic development mission by universities. The second is the influence of one helix upon another. The third dimension is the creation of a new overlay of trilateral networks and organizations from the interaction among the three helices, which formats high-technology development. The Triple helix model denotes the university-industry-government relationship as one of relatively equal, yet independent, institutional spheres which overlap and take the role of the other (Wessner, 1999; Etzkowitz, Gulbrandsen & Levitt, 2000; Viale & Campodall'Orto, 2000; Etzkowitz, 2002; Leydesdorf, 2005).

Thus, global, national, regional and local innovation systems (such as cluster of industries) with the support from the side of educational and training system are the main building blocks of the "New growth theory" (OECD 1999). The model of "New growth theory" shows the

relationship between the main actors of knowledge-based economy, i.e. enterprises, universities, government and other public research institutions, and the variety of some specific factors such as the industry structure, the education and training system, the human resources and the labour market, the financial system, etc. Therefore, the education and training system, human resources and the labour market, and the financial system all have a substantial impact on the performance of the chain 'Academia-Government-Industry'.

Summing up, many scientists see many opportunities in transforming national economies into competitive knowledge based system, which assures economic and social welfare. From this perspective, the performance of an economy depends not only on how the individual institutions perform, but also on how they interact with each other as elements of a collective system of knowledge system. Such interactions between various institutions are possible within the well-developed structure of funding, which supports every institution and ensures the inter-connection between all three elements: science, technology and industry. In this case, the Government and Government's abilities to manage all processes are extremely important, especially, designing an appropriate funding structure developing sector of high technology.

Practical application of high technology development in the Baltic States

In order to complete practical application particular indicators expressing different aspects of high technology sector development regarding to the analysed theoretical models were in use conducting correlation analysis. Indicators that may express leading and the most important tendencies of university-government-industry cooperation in sector of high technology are listed as follows: real GDP growth rate (R_1); GDP per capita growth in Purchasing Power Standard (R_2); inflation rate (R_3); total investment as percentage of GDP (R_4); export as percentage of GDP (R_5); unemployment rate (R_6); real unit labour cost growth (R_7); labour productivity pro hour worked (R_8); number of researchers (R_9); expenditure on R&D as percentage of GDP (R_{10}). Correlation analysis has been performed in order to establish dependencies on indicators of four basic approaches characterizing sector of high technology. Three of them are suggested by *Eurostat*: the patent approach (number of patents) (see Table 1, next page); the sector approach (number of enterprises working with high technologies) (see Table 2); the product approach (turnover of trade of high technology production) (see Table 3). Additionally, a share of high technology products in the country's export representing international level of high technology development as the fourth studied element has been investigated (see Table 4). The period of twelve years from 2001 to 2012 was investigated. The data was collected from statistical bureaus of Lithuania, Latvia, Estonia and Eurostat. Results are provided below with noted established correlations between investigated factor.

The correlation analysis revealed the most important indicators generating the largest number of relations with investigated elements in the Baltic countries: GDP per capita growth in Purchasing Power Standard (R_2), labour productivity pro hour worked (R_8), number of researchers (R_9) and expenditure on R&D as percent of GDP (R_{10}). Comparative analysis of the structure of expenditure on the sector of high technology in the Baltic States shows that in 2012 the highest level of expenditure is observed in Estonia – 2.19 percent (380.7 mln. EUR) comparing to 0.90 percent in Lithuania (297.01 mln. EUR) and 0.66 percent in Latvia (145.4 mln. EUR).

Table 1. The result of correlation analysis between the *number of patents* (patent approach) and investigated variables in the Baltic States

Country	R ₁	R ₂	R ₃	R ₄	R ₅	R ₆	R ₇	R ₈	R ₉	R ₁₀
Lithuania	0.1703	0.5243	0.2390	0.5642	0.1919	-0.5239	-0.0354	0.4974	0.4692	0.5169
t-observed	0.4889	1.7414	0.6962	1.9326	0.5531	1.7397	0.1002	1.6217	1.5027	1.7080
Latvia	-0.5259	0.7433	0.4531	0.5434	-0.0711	-0.0413	0.1260	0.7123	0.4952	0.2598
t-observed	1.7489	3.1424	1.4374	1.8307	0.2016	0.1169	0.3591	2.8702	1.6124	0.7609
Estonia	0.4572	0.4297	0.0328	0.6475	0.1890	-0.2281	-0.1087	0.2863	0.2309	0.1890
t-observed	1.4542	1.3460	0.0928	2.4029	0.5443	0.6627	0.3092	0.8452	0.6712	0.5443
t-statistics	2.3060									

Table 2. The result of correlation analysis between the number of innovative enterprises (sector approach) and investigated variables in the Baltic States

Country	R ₁	R ₂	R ₃	R ₄	R ₅	R ₆	R ₇	R ₈	R ₉	R ₁₀
Lithuania	-0.3902	0.9392	0.7993	0.7203	0.5517	-0.4797	-0.2452	0.8672	0.9224	0.8734
t-observed	1.1989	7.7341	3.7616	2.9368	1.8712	1.5463	0.7155	4.9256	6.7536	5.0725
Latvia	-0.3571	0.9634	0.4635	0.8605	0.3276	-0.2912	0.3404	0.8633	0.8277	0.7146
t-observed	1.0812	10.1708	1.4795	4.7779	0.9809	0.8611	1.0241	4.8371	4.1725	2.8892
Estonia	-0.3615	0.9428	0.4253	0.5666	0.0736	-0.5640	0.5822	0.7029	0.7777	0.7022
t-observed	1.0968	8.0004	1.3292	1.9451	0.2088	1.9317	2.0253	2.7948	3.4994	2.7893
t-statistics	2.3060									

Table 3. The result of correlation analysis between the turnover of trade of high technology production (product approach) and investigated variables in the Baltic States

Country	R ₁	R ₂	R ₃	R ₄	R ₅	R ₆	R ₇	R ₈	R ₉	R ₁₀
Lithuania	0.4078	0.1750	0.1179	0.3956	0.2755	0.0168	0.0413	0.1690	0.3653	0.5080
t-observed	1.2631	0.5029	0.3357	1.2185	0.8105	0.0475	0.1169	0.4851	1.1100	1.6680
Latvia	0.0315	0.8029	0.7433	0.4048	0.0093	-0.6806	0.7571	0.4162	0.7219	0.7019
t-observed	0.0892	3.8096	3.1428	1.2520	0.0264	2.6275	3.2775	1.2948	2.9506	2.7871
Estonia	0.2579	0.9055	0.6216	0.9322	0.9512	0.8481	-0.0120	0.8997	0.9180	0.8258
t-observed	0.7550	6.0328	2.2443	7.2861	8.7188	4.5265	0.0340	5.8283	6.5451	4.1418
t-statistics	2.3060									

Table 4. The result of correlation analysis between the share of high technology products in the countries' export (the high technology export approach) and investigated variables in the Baltic States

Country	R ₁	R ₂	R ₃	R ₄	R ₅	R ₆	R ₇	R ₈	R ₉	R ₁₀
Lithuania	-0.4023	0.8642	0.7372	0.7149	0.5215	-0.3812	-0.3249	0.8081	0.8906	0.8410
t-observed	1.2429	4.8584	3.0858	2.8922	1.7285	1.1661	0.9716	3.8797	5.5397	4.3960
Latvia	-0.5493	0.9257	0.3483	0.8853	0.1844	-0.0782	0.1339	0.9413	0.8002	0.5545
t-observed	1.8594	6.9221	1.0510	5.3846	0.5306	0.2218	0.3822	7.8899	3.7739	1.8847
Estonia	0.4993	-0.8019	0.0839	-0.7570	0.3618	-0.0232	-0.0898	-0.8693	-0.8612	-0.8294
t-observed	1.6300	3.7966	0.2382	3.2764	1.0977	0.0657	0.2551	4.9742	4.7921	4.1989
t-statistics	2.3060									

Deeper analysis (see Table 5, next page) shows that in Estonia the absolute majority of expenditure on R&D goes on business sector (57.53 percent in 2012). Notably, the structure of funding faced serious changes during the period of recovery after financial crisis. As a

result in this period the weight of financial support on the sector of high education is gradually decreasing.

Table 5. Structure of expenditure on R&D in the Baltic states (in percent)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Estonia												
Business sector	33.63	30.66	33.88	38.97	45.09	44.44	47.15	43.20	44.68	50.16	67.17	57.53
Government sector	14.09	16.98	15.76	13.26	11.29	13.13	8.66	11.77	10.99	10.55	8.09	9.29
Higher education	50.53	47.87	47.25	45.48	41.43	40.62	41.80	42.94	42.16	38.04	27.83	32.13
Latvia												
Business sector	36.49	41.80	34.30	44.37	40.71	50.38	32.54	25.03	31.00	36.95	27.79	22.63
Government sector	21.33	18.67	23.55	19.61	18.77	15.09	24.23	27.54	25.00	23.00	23.34	27.10
Higher education	42.18	40.25	42.15	36.01	40.51	34.53	43.23	47.44	27.00	66.69	48.94	50.28
Lithuania												
Business sector	29.10	16.86	21.01	21.43	20.39	27.94	28.53	23.75	24.39	29.40	26.22	26.60
Government sector	39.57	33.39	26.43	24.65	24.98	22.85	20.84	23.12	23.41	17.54	19.58	19.67
Higher education	31.33	49.75	52.57	53.92	54.63	49.21	50.63	53.13	52.20	53.06	54.21	53.74

Sources: Statistics Estonia, Central statistical bureau of Latvia, Statistical department of the Republic of Lithuania

Structure of funding of research and development in Lithuania and Latvia are quite similar and rather contrary to the processes in Estonia. Structure of funding of research and development in Lithuania is specific due to attention to the needs of sector of higher education. 53.74 percent of expenditure on R&D is spent in higher education sector in 2012, whereas in business sector it made 26.60 percent, and 19.67 percent in government sector respectively.

Latvia after supporting processes of research and development in business sector in period of 2002-2006, in 2007 has decided to choose the Lithuanian model of expenditure on R&D: in 2012 50.28 percent of spending goes to higher education sector, 27.10 percent goes to sector of government and 22.63 percent – to the business sector.

In order to establish the impact of selected structures of funding on the sector of high technology development many-factor analysis on example of European Union was in use. Resulting matrix facilitates decision making process of choosing appropriate funding structure in order to improve country's performance on different stages of high technology development.

Table 6 (next page) provides the reliability estimates for each of the seven study measures included in the final analysis. As the result, expenditure on R&D, expenditure of national budget on social and economic needs, share of expenditure on government, number of R&D personnel, human resources in science and technology have statistically significant relations with the number of patents (patent approach of high technology sector development) and with the average share of the sector of high technology in the world export (high technology export approach).

Table 6. Estimation of correlation between multiple indicators and attributes of evaluation (prepared by author)

Criteria		Expenditure on R&D	Expenditure of national budget on social and economic needs	Share of expenditure on business enterprise sector (% of GDP)	Share of expenditure on government sector (% of GDP)	Share of expenditure on higher education sector (% of GDP)	R&D personnel	Human resources in science and technology
Number of patents	r	0,9378	0,83093	0,360215	0,465149	0,208442	0,888236	0,850273
	t	13,506	7,467325	1,930685	2,627268	1,065618	9,667599	8,077209
Number of innovative enterprises, %	r	0,1566	0,018847	0,701205	0,056859	0,407077	0,045678	-0,07308
	t	0,7928	0,094253	4,917558	0,284756	2,228376	0,228630	-0,36635
Average turnover of the sector of high technology, % of GDP	r	0,1018	0,04728	0,439899	0,243444	0,290417	0,067754	0,013543
	t	0,5116	0,236662	2,449199	1,254975	1,51749	0,339550	0,067723
Average share of the sector of high technology in the world export, %	r	0,9184	0,853343	0,376821	0,401527	0,269722	0,890322	0,84281
	t	11,606	8,183983	2,034044	2,192108	1,400518	9,776647	7,829729

$t_{stat.} = 2,0595$

Conclusions

On the basis of empirical studies assessing countries performances developing sector of high technology there is suggested to evaluate number of patents reflecting sector's capacity, number of innovative enterprises reflecting business capacity, turnover of high technology trade reflecting national capacity and share of high technology in national export representing international level of high technology development. The Triple helix model, encouraging deeper cooperation between government, business sector and academic society, is being detailed with significant criteria, identified by the results of the many-factor analysis: expenditure on research and development; expenditure of national budget on social and economic needs; share of expenditure on business enterprise sector (percentage of GDP); share of expenditure on government sector (percentage of GDP); share of expenditure on higher education sector (percentage of GDP); research and development personnel; human resources in science and technology. Resulting matrix may be in use in order to design an appropriate funding structure of the sector of high technology depending on country's priorities on different levels of high technology sector development.

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Trust as an enduring organizational value for competitive advantage in a constantly changing business world: Theoretical analysis and empirical findings from two research studies

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Abstract

Trust and its creation is key in creating greater commitment to an organization, which positively affects employees' commitment to organizational goals and changes (Puusa & Tolvanen, 2006). The purpose of this paper is to demonstrate the relationships of organizational values and employee competence utilization with a special focus on trust and product innovation. Herewith, the paper shows how trust is an integral part of values supporting product innovation, which in turn is a major attribute for the usage of employees' competences. Further to an intense literature review, the paper shows the results of two different empirical studies. With this, it gives two perspectives on the topic of trust, which result in a consolidated evaluation on the importance for practitioners.

Introduction

'Why do some organizations perform better than others?' (Scott & Davis, 2007). With respect to the performance target of each company, 'socially complex resources (like people)' are considered to be more durable and less susceptible to imitations than other types of assets (Barney, 1991). In addition, innovation is considered to be a characteristic of healthy organizations and enables companies to change according to market needs and therefore stay competitively advanced (Delbecq & Mills, 1985). This is why this research paper seeks to demonstrate with the help of two empirical studies how competence utilization, especially in the form of innovation, is a key issue. The two studies overlap in that they both see values, particularly trust, as determining factor for organizational outcomes such as competence utilization and innovation. As a consequence, the proposed questions are: 1) Which values do managers evaluate to be important to product innovation? 2) How is the importance of trust seen? 3) What is the general impact of trust on ECU? 4) How is innovation a part of ECU?

Theoretical background and development of a combined model: Organizational values, social capital, trust and product innovation

Values can represent organizational cultures and even if organizations may differ in terms of their dominant values, there are common value dimensions that run through most organizations (Howard, 2008). Most authors agree that corporate culture refers to the set of values, beliefs and behaviour patterns that form the core identity of an organization (Denison, 1984). Therefore, shaping and enhancing values must be of primary concern and relevance to managers and leaders to make a company successful (Deal & Kennedy, 1982). At first sight, the literature on values interrelated with innovation only provides a very inconsistent and diversified picture. Different authors name some topics, such as freedom, trust, or commitment consistently and explicitly whereas other subjects such as result orientation or market orientation mainly need to be interpreted from latent content. In addition to that, there are topics that lack consensus regarding their contribution to innovation. Martins and Terblanche (2003), for example, outline that values like rigidity, control, predictability and stability mostly hinder creativity and innovation (Arad et al., 1997, in Martins & Terblanche,

2003). For others, control values must be seen as an enabling potential for flexibility values such as freedom or empowerment (Khazanchi, Lewis, & Boyer, 2007). As a result of a literature review on 40 academic articles, the following value themes were formed and are stated to be most essential for product innovation: achievement, altruism, authority, debate and discussion, freedom, involvement, market orientation, risk taking, self-direction, social recognition, support, and trust. Accordingly, the main hypothesis for the research on the impact of organizational values on product innovation is phrased as follows:

H₁: The more a company promotes a defined profile of organizational values, the higher the product innovation performance of that organization is.

Across disciplines it is very much the consensus, that trust, as a form of social capital, is critical to our society (Song, 2008). Social capital is an investment in social relations with expected return (Lin, 1999) and describes the resources that derive from relationships (Steinfield, 2009). As Putnam further elaborates social relations are ‘based on shared norms and goals leading to committed and meaningful action’ (Putnam, 1993 in Lin, 1999). Sumilo and Bauman (2007) point out that social capital is the ability that needs to be provided, used and activated based on a framework that promotes a social network, an atmosphere of mutual trust based on reciprocity, and the motivation to cooperate and be involved in beneficial exchanges (Sumilo & Bauman, 2007). With respect to this definition, trust is seen as the basic element of social capital within this research work. Luhmann defines trust as a “risky performance in advance” (Luhmann, 2000). There are different scientific approaches of trust. This research focusses on actions of individuals and social structures and is therefore mainly related to the sociological approach. This research further refers to both interpersonal trust and system-trust: as ‘organizations and systems are mostly represented by humans and therefore a personal trust mechanism has always to be considered’ (Rupf-Schreiber, 2006). With this foundation, the main hypothesis for this research is phrased as follows:

H₂: The higher the creation of mutual trust - the better employee competencies are utilized (ECU).

Both studies are embedded in the frame of organizations. Referring to the elements of organizations described in the Congruence Model of Organizations by Nadler and Tushman (1997), organizational culture and values as well as social capital are part of the informal organization, which relate to the emergent characteristics of the organization that affect its way of operating (Scott & Davis, 2007). Summarizing both approaches, the authors state that their studies are strongly interlinked. While trust highly impacts on innovation outcomes, it is also seen as a form of social capital, which needs to be provided, used and activated based on a framework, and the motivation to cooperate and be involved in beneficial exchanges. The relevance of innovation within the competence field has been touched in different ways, too. Eberl (2009) specifies organizational competencies based on three dimensions: cognitive, practical and affective. The affective dimension refers to ‘creativity and motivation in unsecure environments’. Especially within the affective dimension the knowledge factor plays an important role. It refers to the capability to achieve new cognitive junctions (Eberl, 2009). With this, innovation as part of the competence construct can be positioned in the affective dimension. As a result, the authors developed the following combined model as pictured in Figure 1. Herein, innovation is part of the affective dimension of the utilization of employee competences, which in study 2 are defined as the best possible combination of high willingness to perform and high ability to perform (Bolzen-Konrad & Sumilo, 2014). Moreover, trust is seen as an integral part of the organizational value profile and culture, which relate to the social capital of companies. Thus, both backgrounds provide various

touchpoints for organizations to reach competitive advantage in a constantly changing business world.

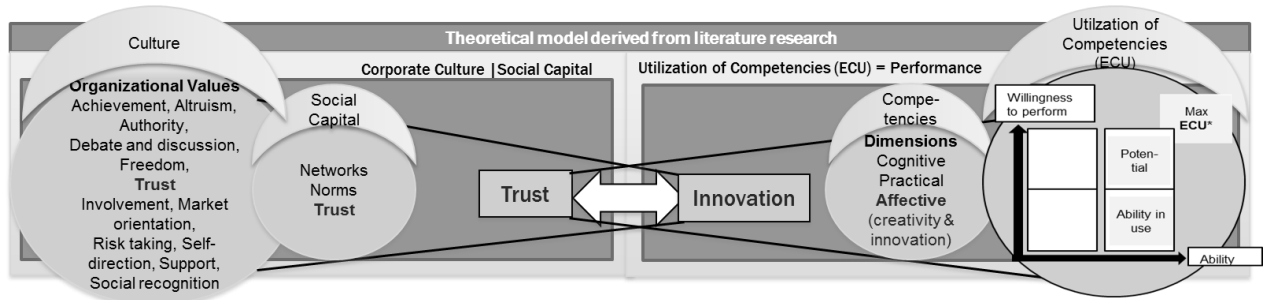


Figure 1. Combined model of trust as an enduring organizational value for competitive advantage
Source: Own figure.

Data and Methods

As outlined, one research introduced here worked on the hypothesis that the more a company promotes a defined profile of organizational values, the higher the product innovation performance of that organization is. In accordance with other value measurement instruments such as the Schwartz' Value Survey (used in Zhang, Austin, Glass & Mills, 2008), the Work Values Survey (used by Cable & Edwards, 2004), the Situational Outlook Questionnaire (provided by Isaksen, Lauer & Ekvall, 1999), the Organizational Dynamics Instrument (introduced by Reynierse & Harker, 1986), or the Rokeach Value Survey (published in Rokeach, 1973), all value themes were operationalized in terms of how much they are characteristic for a chosen organization. For operationalizing product innovations, different indicators were used. One part, used for the results presented in this paper, ensued a recent approach practised by other innovation researchers (Naranjo-Valencia, Jiménez-Jiménez & Sanz-Valle, 2011; Naranjo-Valencia, Valle & Jiménez, 2010; Prajogo & Ahmed, 2006). With specific regards to product innovation, enterprises had to evaluate their innovation performance against industry competitors in the past three years in order to limit industry effects. Indicators included for example the number of new products introduced, financial efforts to develop new products, the speed of new product development and others. For this research design, a written, online self-completion questionnaire mainly consisting of closed questions was the preferable instrument of data collection, which underwent several pre-tests. The company survey took place between February 25th, 2014 and April 25, 2014. All data were analysed with the statistical software of IBM SPSS 21. On the whole, 81 respondents from different German and Austrian industrial companies took part in this research with a focus on Tyrol, Bavaria, and Baden-Wurtemberg and some emphasis on the chemical industry, computer and electronics branch and the machinery industry.

For the other study, hypothesizing that the higher the creation of mutual trust the better employee competencies are utilized (ECU) measurable indicators had to be found. Based on a first pilot study, the anterior literature review and the chosen definitions for trust, a number of trust indicators have been chosen for this research: fairness, transparency, network and delegation. The indicators for the dependent variable ECU have been based on a variety of management literature. In order to define competence utilization, the research relates to the definition of maximal ECU to the situational leadership style of Hersey and Blanchard (Hersey & Blanchard, 1974). In saying that the competence level is an intervening variable (constant basic competencies) the commitment part is of importance in this study. With regard to this, the main indicators chosen for this study are: retention, over obligatory performance, productivity per employee and satisfaction (Bolzern-Konrad & Sumilo, 2014). The empirical

testing was planned and executed in a stepwise approach with quantitative and qualitative methods. The results shown in this paper are based on semi-structured interviews with 10 companies. The involved companies were chosen mainly out of medium and small sized manufacturing companies in Germany with experience in the field of Business Excellence. Branches are distributed in the fields of Medical, Fibers, Metal, Furniture, Telecommunication, Mechanical Engineering and Safety Systems. The Expert Interviews were directed to managing directors or chief executive managers and took place between March 3rd and June 11th. In addition to that, these insights are validated by a quantitative expert survey conducted on an experts conference in order to analyze trust in a Business Excellence (BE) environment.

Results of the two empirical studies

Firstly, the research assessing the impact of organizational values on product innovation is introduced. As assessed by Kolmogorov-Smirnov-Tests and Shapiro-Wilk-Tests ($p < .05$) in addition, no scores in the questions on innovation performance, nor on values are normally distributed in this dataset. Therefore, non-parametric tests are used and detailed evaluations of ratings are outlined, since mean values cannot provide valid results. To start with, the questionnaire made participants evaluate the importance of each of the 12 defined value theme on an ordinal scale ranging from important to unimportant. A comparison of the top two ratings (“important” or “rather important”) of managers’ perceptions regarding the values under research is shown in Table 1.

Table 1. Comparison of the top 2 ratings on importance of values and derived ranking

	Percentage share of respondents’ ratings	
	Important	Rather important
Debate & Discussion	68%	26%
Market orientation	65%	23%
Risk taking	53%	32%
Trust	49%	35%
Support	41%	44%
Self-direction	41%	40%
Achievement	40%	40%
Freedom	37%	42%
Involvement	30%	53%
Social recognition	17%	52%
Authority	6%	12%
Altruism	2%	21%

Source: Own table.

Thus, the value set of debate and discussion, market orientation, risk taking, and trust is considered to be important and therefore earns the highest rating possible in this research by the clear majority of respondents. Ratings for the values of support, self-direction, achievement, and freedom are more or less equally distributed between “important” and “rather important”, which indicates a less unambiguous tendency towards being most important values. Finally, for the last four value themes (involvement, social recognition, authority, altruism), this comparison reveals a definite drift to ratings below “important” or even below “rather important”. Thus, these values have to be considered as less decisive for practitioners, indeed. To explore the dependence between two random variables, Spearman’s rho is the nonparametric measure of choice for the following analysis. The following variables were used for this statistical procedure: participants’ estimated levels of

characteristics of the value themes for their companies and their subjective self-evaluation of innovation performance. This reveals significant findings for the value themes of achievement, altruism, debate and discussion, involvement, risk taking, support, and trust. Interestingly enough, no correlations can be stated for the value themes of authority, freedom, market orientation, self-direction, and social recognition. Generally, a correlation coefficient between 0,2 and 0,4, as in the case of this research, must be considered as a rather weak correlation. However, it is clear that innovation outcomes depend on many different factors – organizational values are just one aspect of that. Therefore, weak correlations must not be seen as confinement. Rather, it is an important result of this analysis that there is a relationship between these variables at all. From this, the hypothesis that there is no connection between these variables in the wider population must be rejected. What this analysis brings to light instead is, for example, that the more companies regard an organizational value of trust as a characteristic of their company, the better they are at the speed of new product development compared to industry competitors ($r_s = .241$). To sum up, up to now, it has to be assumed indeed, that the more a company promotes a defined profile of organizational values, the higher the product innovation performance of that organization is. As determined in this study, trust plays an integral part here.

Secondly, the research assessing the impact of trust on ECU is introduced by showing the results gained from the 10 companies and 35 BE experts. The expert interviews in their semi-structured form allow different analyses. In a first qualitative question the character of the company had to be described. The most significant character to which the managers set value was ‘bonding (of employees) to the organization’, completed by identification with the organization. Secondly, innovation was emphasized as a specific characteristic of the company. However, this included all forms of innovation like product, process/technology, system and organizational innovations. But also care and trust with its aspects of reliability, fairness, integrity and honesty have been accentuated in describing the character of the respective companies. With the intention to picture the importance of trust the following quantitative question has been raised: Which characteristics do you associate with your company? Also, the BE experts in the subsequent survey have been asked to name important characteristics and values being associated with Business Excellence. The corresponding results for both questions are shown in table 2 (next page).

All company managers rate trust and team spirit at highest levels. To this, innovation (6) keeps in line with quality (6), competence (6), the willingness to perform (6) and respect (7). Adjoining the results of the Business Excellence Experts, gathered in step 3, and asked to name the characteristics being important for a Business Excellence system, again trust can be found in the highest ratings. For the experts though the aspect of responsibility taking (32) is ranked at the absolute top. Also quality, team spirit and the willingness to learn are evaluated to be significant within BE Environments. The direct connection to innovation (16) and problem solving ability (17) is seen more cautious but also relevant by these experts. On the ECU side it catches the eye that both, retention time and work place security are very high rated in all participating companies. Although some companies had to undergo some restructuring processes the general feeling of safety has to be seen as a dominant background factor. Nevertheless, the very high average retention time in all respective companies can be seen as a positive indicator as regards to ECU. This can also be underpinned by high values as regards to positive performed projects and the positive fulfillment of target agreements. However, the questions regarding improvement suggestions as well as the establishment of new processes and publishing of new patents rank medium but lower than the other aspects.

Table 2. Associated characteristics with regards to survey companies and Business Excellence experts

*Number of Naming	Characteristic / values associated with the company (10 companies) *	Characteristics / values connected with BE (35 BE Experts) *
Quality	6	28
Innovation	6	16
Responsibility	5	32
Competence	6	25
Willingness to perform	6	22
Integrity	2	13
Team spirit	9	25
Openness	4	14
Respect	7	22
Honesty, frankness	4	16
Fairness	5	17
Trust	9	26
Willingness to learn	3	28
Problem solving ability	1	17

Source: Own table.

Discussion and Outlook

Clearly, both studies focus on Western European countries regarding the sampling. Study 1 is one-off cross-sectional and study 2 focusses on the Business Excellence environment. Both aspects limit them in terms of generalization. However, both studies can be seen in an overall business management context and combine two different perspectives on trust, being shown in a consolidated evaluation, giving various theoretical and practical implications.

To answer the first research question phrased in the introduction of this paper (“Which values do managers evaluate to be important to product innovation?”), it can be stated from the empirical findings shown here that the value themes of debate and discussion, market orientation, risk taking, and trust rank highest. In addition and as an answer to research question two (“How is the importance of trust seen?”), it has to be emphasized that trust plays a very important role for supporting product innovations. Not only does it rank fourth according to managers, it also correlates positively with the speed of new product development compared to industry competitors. Moreover, the empirical findings of study 2 show the importance of trust. The third research question (“What is the general impact of trust on ECU?”) can be answered as follows: Interestingly enough, the results of the first study show the values debate and discussion as well as market orientation are rated to be important. These values are important for change and the creation of knowledge. But also risk taking and trust achieve high ratings. With the definition of trust in study 2 being a ‘risky performance in advance’, trust can be seen as an initiator that allows risk. As also shown in study 2, only after trust is established competent action is possible. At this point and referring to the theoretical positioning of the variable of trust within the frame of social capital the aspects of both bonding and bridging social capital are relevant in organizations (Bolzern-Konrad, 2013). For the fourth research question (“How is innovation a part of ECU?”), it has been theoretically evaluated that innovation can be seen as part of the competence construct positioned in the affective dimension. Nevertheless, as explained before, competent action includes action

relation, self-organization and the relevance of learning (Eberl, 2009). The results of study 2 allow the presumption that both, action relation and self-organization are well noticeable in all 10 companies. With the emphasis on team spirit and trust based on internal bonds, responsible and well-performed action seems to be supported. A strong innovation culture, however, might also require bridging social capital. As Lin (1999) states: for searching and maintaining resources not previously possessed, loose ties, mirrored in bridging social capital (trust) might be of additional importance (Lin, 1999). This is explicitly of value as the results of study 1 show that market orientation is rated generally high. Also the results of study 2 show that innovation with regards to products is important. Naturally, this should include customers' inputs. BE experts support this by stating that the importance of customer orientation is of the same importance as continuous improvement, system thinking and the focus on the employees.

To finalize, in a constantly changing business world trust can be seen as an enduring organizational value for efficiently using and retaining a company's human capital and, with this, creating sustainable competitive advantage, for example in terms of product innovations. Nevertheless the authors still see research questions left open. Future research could address, whether there are situations where trust does not contribute to organizational outcomes and what other values are needed in contrary. Besides, the authors assume an interrelation with national culture indeed, which opens up another very broad research field.

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Chapter 7: Human Resource Management in Practice

Impact of employees' perceived HRM practices and espoused values fit on their performance and job satisfaction

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Abstract

The objective of the article is to examine the influence of the espoused values fit and perceived HRM practices on the performance of the employees (N=307) and their job satisfaction. Adapted methods of Schwartz, Cameron and Quinn, Spector (JSS), with additional questions on perceived HRM practices were used. Collected data were anonymously combined with the employee performance indicators from company databases and analyzed using SPSS 22.0 software.

The findings indicate that perceived HRM practices are positively correlated with espoused values fit and job satisfaction. No significant correlations between the espoused values fit, HRM practices and employees' performance were found. More correlations between the priorities of individual and organizational values have been revealed. Directions for the future research will be discussed.

Theoretical background for the research

Linking HRM practices and strategies to the employees' performance and job satisfaction has obvious benefits for the management of the company strategy and human resources. However the result of such practices is not always as straightforward as it might seem, since as the HRM practices have to be identified and their effectiveness measured.

The advisory proposal for measuring HRM actions could be the introduction of the questionnaire examining employees' perceived HRM practices, with the purpose of measuring the subjective perception of effectiveness of HRM function by the employees. In practice the measurement of such HRM actions should be also associated with company's success variables such as job satisfaction and performance. According to theoretical data obtained from several authors these success factors can be either contradictory or supporting each other.

It is an obligation of every strategist to search for additional tools to boost job satisfaction and performance. One of such tools could be the values fit. The principle in the values fit generally means that there is some kind of compatibility (congruence) between the person and the organization, which has direct or indirect link to company's performance and possible competitive advantage. Such compatibility is also described as being an important tool to achieve organizational goals. Values have been a research object in social and human sciences for a long time. In HRM and organizational context it is described as a glue holding organization together.

There are a lot of different methods to measure the fit between the person and the organization, and between the values of the individual employee and the company. Such fit factors could be the fit between family and work; between personal and organizational goals, and self-realization. Scientific literature often segregates values into individual, organizational (core) and espoused values of the company. Rokeach concluded that it is possible to talk about the organizational or group values the same as the individual values (Rokeach, 1973).

The individual values is a significant factor in revealing what is important to people, the organizational values disclose what is important for the organization. We have concentrated on the topic of the espoused values fit which is a tool chosen by management to facilitate achieving organizational goals. The espoused values are statements and priorities by which management tries to organize company's ideology, often stated near the mission and vision on the front pages of the company's website. However, the espoused values are often criticized to be ineffective and also quite distant from the company's reality. Rokeach and Schwartz view values as enduring belief (Cheng, 2010). Schwartz created the value list of 56 values which were divided into 10 dimensions. The definition of the organizational core values is often described as organizational culture typologies showing the way company is, and the espoused values which reflect the way managers want company to be. The biggest misfit usually is in the notion of organizations core values rooted deep in the organizational culture, and organizational espoused values which are the statements usually introduced by management to facilitate achievement of the organizational goals. The individual and organizational values usually are a part of the larger fit questionnaires. The importance of the fit was revealed by numerous of research yet the angle of the researchers and the research results are often trivial lacking the adaptability and practicality meaning, how the values are fitted in specific company.

High-involvement HRM strategy starts with management philosophies and core values that emphasize the significance of the employees as a source of competitive advantage linking HRM functions to full integrity of the firm (Bae and Lawler, 2000). These goals are often achieved through the espoused values fit. However, despite the effort of HRM department and top management, in order for the strategy to be effective, the research of the espoused values fit and the linkage to the firm's success factors, is needed. The variable producing evidence for integrity could be opinion of the employees regarding the success of the measures of the HRM functioning. The espoused values itself have an impact on managers' performance and beliefs, but in this particular research focuses on employees' perceived opinion and the effect it has on other variables.

HRM practices or functions are a set of rules and procedures followed by HRM department to manage people for achieving organizational goals. The definition could be split into two parts between actual HRM practices, and the way employees' perceive them. The combination (bundle) of the different HRM practices is thought to be more effective than employing a single practice. The study of bundles of HR practices, as opposed to individual HR practices, has been increasingly recognized by researchers (Toh, 2008). The sets of the bundles differ depending on the strategy of the organization, however most include the traits of selection; adaptation and socialization; development and education; compensation and evaluation of the employees.

The list of the espoused values is also present in most organizations. Usually it is put in one system with the vision, mission and values set. By definition it belongs to the strategic management sphere, sometimes it is called philosophy of the company, and is based on the principles declared the by management to facilitated achieving organizational goals. It is popular to communicate the espoused values to the customers and the employees by putting them on the front pages of the company's website.

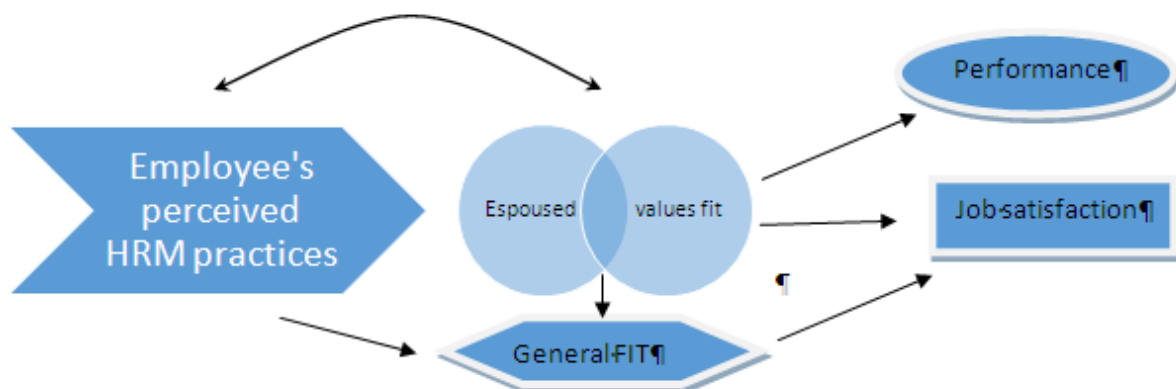
The performance could be defined as the ability of an employee to reach measurable goals and standards effectively and efficiently. The performance is often related to the pay and other benefits received by the employee, and in some cases, can also be related to the job

satisfaction, one of the values often associated with the performance. The manager's task is "converting espoused values into values in use: that the rhetoric becomes reality" (Armstrong, 2006). Indeed, for every manager, it is a challenge to link employees' performance with personal gains of the employee, through the competitive ideology of the company. A lot of companies are trying to increase the level of job satisfaction among their employees, hoping that this will increase their productivity (performance). According to Robbins (2007), the relationship between job satisfaction and productivity shows a rather weak (+ 0.14) correlation. Therefore, we can see that productivity and job satisfaction are two different dimensions of the company's success measurement and should be analyzed separately.

It is generally agreed that job satisfaction expresses the attitude of the employee: job satisfaction shows how people feel about their jobs and different aspects of their jobs (Spector, 1997). Job satisfaction is a general attitude that the employees have towards their job and is directly related to the individual needs regarding, work challenges, equitable rewards, and a supportive work environment and colleagues (Ostroff, 1992). The attitude of the employees towards their job can be measured as high and low. If the employee is unsatisfied with his work, his attitude is negative. If the employee is satisfied with his work, his attitude is positive (Robbins, 2006). Individual and organizational values could provide a source of motivation and increase job satisfaction. The misfit between organizational and individual values of the employees can be a source of cognitive dissonance for the employee and is related to stress and a lower job satisfaction. Demographic characteristics also have an impact on job satisfaction of the employees: age (Jucevičienė, 1996), educational background (Verhofstadt, 2007), the length of work (Oshagbemi, 2003), gender (Van Praag, 2008).

Job satisfaction is a psychological concept linked to employees' performance, lower turnover, loyalty, productivity and other factors of the organizational success. It is also related to demographic factors such as age, gender, and education of the employees. Job satisfaction is related to individual and organizational values (Diskienė and Goštautas, 2010).

Figure 1. Hypothetical Research model



Research instrument and scales construction

The employees surveyed were from a Lithuanian telecommunications company. For data gathering, the internet survey method was used. The survey link was sent by email to the employees of the company. The questionnaire was answered by 307 respondents. The valid

answers to the questionnaire differed per questions. While constructing a survey, the list of espoused values was taken from the company's website, and the adapted methodology of Paul Spector (JSS) measuring, overall job satisfaction built of nine different facets about how employees feel towards different aspects of their job was used. Performance evaluation variables were used, which were related to the sales and quality of employees' job functions. Values orientation evolution using Adapted Cameron and Quinn and Schwartz questionnaires have been used. Statistical methods such as analysis of means and Pearson's correlation were used. Espoused values' fit measuring the relationship with job satisfaction and employees' performance was evaluated using the Pearson correlation statistical method. The questionnaire included items (questions) for a number of different scales.

Construction of scales: All our model research variables presented (Figure 2) are scales:

The Espoused values fit scale is constructed from 4 espoused values (Openness, Responsibility; Activity; Collaboration rated twice - once by the importance to the employees and second time by the importance to the organization. Therefore Espoused values fit scale is the sum of all 8 variables. The factor analysis showed that they all belong to one factor;

The employees' perceived HRM practices scale (HRM context) consist of 8 variables related to selection; adaptation and socialization; development and education and compensation and evaluation of the employees;

The Total Job satisfaction scale is the sum of 9 facets including (Pay; Promotion; Supervision; Fringe benefits; Contingent rewards; Operating procedures; Coworkers; Nature of work and communications);

General fit scale includes 4 questions regarding employee's opinion about the: self-realization fit; fit of individual and organizational values; fit between personal and organizational goals; and the fit between family and work.

The demographics and sample characteristics of respondents

Table 1. Frequencies and percent of the demographics of employees – respondents

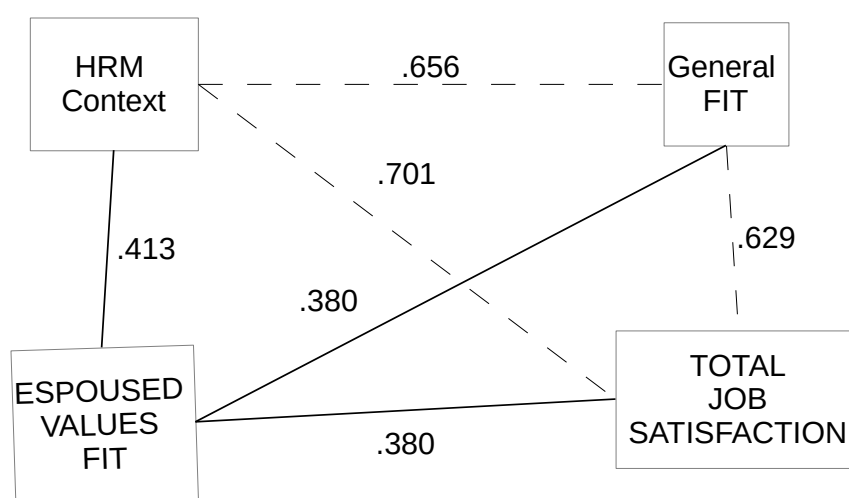
Demographics (N)	Frequency	%
Gender (N=243)		
Male	61	25.1
Female	182	74.9
Age (N=243)		
Under 22	50	20.6
22-25	86	35.4
26-30	56	23.1
31+	51	20.9
Years of service (N=236)		
Under 2	93	39.4
2-4	83	35.2
5+	60	25.4
Education (N=241)		
Secondary school	69	28.6
Collegium	52	21.6
University bachelor	101	41.9
University Master	19	7.9
Family position (N=243)		
Single	180	74.1
Married	63	25.9
Position (N=242)		
Employee	211	87.2
Manager	31	12.8

The (N=243) employees answered the demographic question about their age, the mean of age of the respondents was 27.48 years old. The average of the time employees (N=236) stated they have been working for the company was 3.31 years. The majority of respondents N=307) by gender are female 74.9 % (males 25.1 %).

Employees distributed as follows: finished school: 28.6 %; Collegium (Higher non university) 21.6 %; University bachelor 41.9 %; University master: 7.9 %.

The findings

Figure 2. Espoused Values fit of the employees scale relationship with perceived HRM practices scale, general fit scale and Total job satisfaction scale.



Pearson correlations (2-tailed) (N=238) were significant at a point of 0.001. Reliability analysis results (Cronbach alpha) are: Total job satisfaction (36 items) .920; General fit scale 8 items .705; Espoused values fit scale 8 items .877; HRM context 8 items .901; Source: compiled by authors

Figure 2 shows that Employees perceived HRM practices have a strong relationship with the general fit scale and the total Job satisfaction of the employees. The espoused values fit which includes such items; also has significant correlations with perceived HRM practices; General fit scale and total Job satisfaction of the employees. No significant correlations have been discovered between the scales of the model above and the performance of the employees. However this can be due to the fact that the performance of the employee's variables was not included in the questionnaire, but have been taken from the company's intranet databases.

From the Table 2 you can see the mean differences by gender in values fit scales. Table 2 shows that females have higher ranking of the fit then males. The differences were statistically significant.

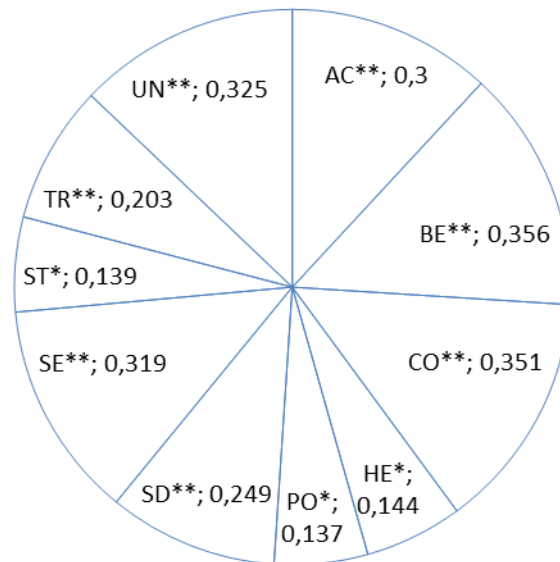
Table 2. Espoused values fit differences between Gender

Scale	Gender	N	Mean	Std. Deviation
Espoused values fit	Male	57	47.12	8.57
	Female	176	50.08	4.122

Differences significance 0.0001; significance (2- tailed). Source: compiled by authors

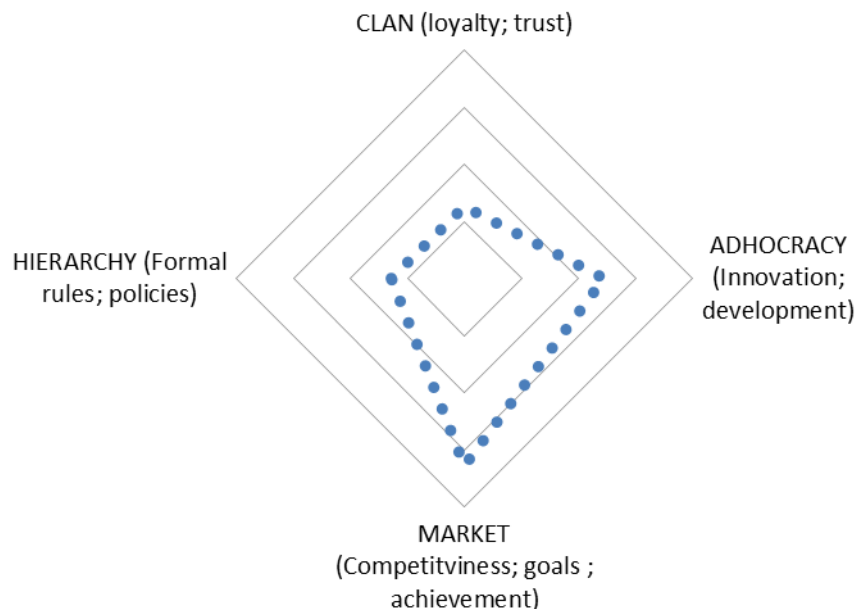
Espoused values fit from all demographical control variables had statistically significant differences between means. Females had a higher values fit then males.

Figure 3. Correlations between adapted Schwartz individual values scales and the fit of espoused values of employees of the company



*. Correlation is significant at the 0.01 level (2-tailed). *. Correlation is significant at the 0.05 level (2-tailed). Methodology adapted (Schwartz value survey, SVS; in Tart, 2000) Source: authors

Figure 4. The distribution between the core values of organizational culture (The glue holding organization together) according to the opinion of the employees.



Values typologies source (Cameron, 2006); compiled by authors.

The organizational core cultural values (Clan) was positively related to the HRM perceived practices scale (Pearson correlation .215; significant at 0.01 level); and negatively related to the market (Pearson correlation-.218; significant at 0.01 level) core values. As in the previous

research (Diskienė, Goštautas 2010) the clan culture typology was associated with higher Job satisfaction (Pearson correlation .222; significant at 0.01 level), as Market culture was associated negatively (Pearson correlation -.266; significant at 0.01 level)

Discussion

The findings indicate that the perceived HRM practices are positively correlated with the espoused values fit and job satisfaction. No significant correlations between the espoused values fit, HRM practices and employees' job performance (Sales & Quantity, data gathered from intranet databases of the company) were found. Females showed higher espoused values fit than males. Other correlations between the priorities of the individual and the organizational values have been revealed. Schwartz values dimensions showed positive correlations with espoused values fit. However no significant correlations have been found between HRM practices, espoused values fit and employees' performance. The question still remains whether the results reflect measurement and situation bias, or they reflect a stable trend for a particular business organization. The relationship model between the employees perceived HRM functions, general fit, espoused values fit and total job satisfaction of the employees of the company was established. Espoused values fit had weaker links with the perceived HRM practices, total job satisfaction and general fit scales. The perceived HRM practices and the espoused values were also linked to the control variables methods (adapted Cameron and Quinn) for the organizations core values and to the job satisfaction and the performance. Two culture types of core values (CLAN; MARKET) were associated with the HRM perceived practices and Job satisfaction.

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Uncommon information about the company offered during e-recruitment and its effect on attractiveness of the company as a workplace

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Abstract

E-recruitment is now one of the most frequent paths for employee recruitment, but there is little knowledge of its rules. The text analyzes the effect of information about cultural and sport sponsorship activities of a company on its being perceived as an attractive employer. Two theories dealing with the effects of image-related information – cultural fit and signal theory – are useful for explaining the effect of information received during e-recruitment on increase in the company's attractiveness. Based on data from a questionnaire study on samples of ca. 80 potential employees the study shows that sponsorship increases the employer attractiveness and that an adequate explanation of candidates' evaluations of the company requires merging the two theories.

Introduction

Online recruitment is the fastest growing sector in contemporary recruitment (Listwan, 2010). Barriers to Internet access in groups of potential employees and employers have decreased, leading to its more widespread use. However, understanding by the managerial sciences and as a consequence, the development of recommendations for efficient management, have been hindered by frequent changes in e-recruitment methods. Lack of competence on the part of employers has also been mentioned as one of the obstacles to its becoming widely used (Woźniak, 2013).

Enterprises are currently advised to strive during recruitment for the position of employer of choice in preselected segments of the labour market. This means that they need to build themselves a positive image in these groups, and select and then manage opinion influencing brand ambassadors. Making full use of the potential of online recruitment also requires turning to online social mechanisms such as crowdsourcing.

Suggestions for creating company employer image and brand ambassadors put forth by the social sciences are still scant. Recommendations concern forms of communicating - such as gamification, blogs, and organizing events with an emotional impact - rather than the content of what is to be communicated. E-recruitment research shows that potential employees are affected in their decisions by two kinds of communication content. Beside information about the package of immediate and palpable benefits (instrumental factors such as remuneration, location, job description, opportunities for development and promotion), also important are the less measurable symbolic benefits (such as adhering to values - environmental, helping disadvantaged groups, benefitting local communities). However, studies of how different types of information influence recipients are inadequate, and the issue of how the appearance of specific website content will affect a company's attractiveness as an employer is still unpredictable.

The goal of this text is to show how information that is untypical for employer branding - e.g. about sponsoring of sports or cultural events, or support for activities related to employee health - can impact the perceived attractiveness of a company as employer. Such information is relatively frequently placed on company websites. However, its effect on the recruitment

process is unclear and this effect is differently interpreted by the two main theories in this field. Our analysis shows how two vying explanations of the mechanisms of assessing image-related information - signalling theory and cultural fit theory - can be treated as supplementary, rather than mutually exclusive.

The text is organized as follows. The first part gives an overview of the specifics of e-recruitment (the interested reader will find more detailed information in my other works). Factors affecting perceived attractiveness of companies as potential employers, as determined by e-recruitment research, are listed. The second part briefly presents two scientific theories that are used to explain the effect on a candidate of the typical kind of information companies use to increase their attractiveness in the recruitment process. Part three describes the premises, methodology and hypotheses of the research reported in this article, and the last part—the results of the study and conclusions.

Factors affecting the attractiveness of a company as potential employer

“Acquiring candidates over the Internet, [i.e.] so-called e-recruitment” is the most rapidly developing group of recruitment methods (Listwan, 2010: 120). Estimates of the scope of online recruitment vary depending on country, sector, type of position being recruited for, and type of organization. In 2010 it was used by three-quarters of large organizations in the United States (Stone et al., 2013: 51), by all the state governments of the United States (Selden and Orenstein, 2011), and by two-thirds of European enterprises (Zajac, 2012).

Poland is not a leader in the use of new technologies (Runiewicz-Wardyn, 2008), but Internet access is no longer an obstacle for employers in their use of online recruitment tools - the Central Statistical Office's data from 2011 shows that over 95% employers are connected to the Internet (see details in Woźniak, 2013). The situation is worse for potential employees - lack of Internet access excludes over one-third of Poles from using online recruitment. Nevertheless, at present, significant Internet exclusion occurs mainly in the group of persons over 60 years of age (80% of Poles in this group do not use the Internet). Internet exclusion levels amount to less than 1/3-1/4 in each of the other age groups. Place of residence and education have also ceased to place severe limitations on Internet access for various social groups (cf. data in: Woźniak, 2013). This belies the popular idea that the Internet can be a recruitment tool only for the youngest and most educated groups of employees in large cities.

If e-recruitment is understood as “a way of implementing [recruitment] strategies, policies, and practices in organizations through a conscious and directed support of and/or with the full use of web-based channels” (Girard and Fallery, 2010:1), it can be said that the Internet has broadened the range of possibilities for reaching potential candidates. It has also changed the scope, and in some cases, the nature, of the tools used to put into effect tasks necessary for an organization's success.

Recruitment has traditionally implemented three functions: informing potential candidates about job openings (information function), motivating them to apply (motivation function) and discouraging persons who do not meet requirements (pre-selection function). Automatized pre-selection based on data provided by forms filled-in on company websites has considerably reduced the importance of the latter. The manner of identifying potentially desirable candidates has changed: Web 2.0 tools (such as Google-type search engines) enable online activity to be monitored for identifying attractive users, and for collecting additional information about potential candidates. Crowdsourcing mechanisms are used to approach

candidates who possess specific qualities and inform them about openings (Woźniak, 2014a). The Internet has therefore provided a range of useful tools for identifying appropriate candidates. What has become essential for the success of recruitment is the second of the three functions, namely motivating appropriate candidates to apply.

In this area, recruitment research struggles with the weaknesses of employer branding theory. Online recruitment can provide financial incentives through crowdsourcing mechanisms, as well as benefit from a community of brand ambassadors the company creates. However, both practises are a precondition for effectively enticing candidates through the building of an attractive employer image in the eyes of the target group (Woźniak, 2014a). The way to achieve this image is still not fully specified by employer branding theory.

The kind of activities that are necessary for building an Internet community around the potential employer are fairly well defined. Dialogue must be initiated with Internet users, not only to encourage them to apply for jobs, but also for the purpose of creating a group that is in various ways connected with the company. Employer branding activities are usually undertaken to construct a group with a positive attitude to the organization, and a familiarity with its problems (brand ambassadors), in the organization's social environment (Woźniak, 2013). Maintaining rich relations between the company and the groups surrounding it requires bilateral communication, which generally occurs online. The Internet also facilitates gamification - the use of entertainment-type games for performing a variety of tasks. A classic example of a game used in recruitment is one developed by the Marriott chain: players can take a virtual part in various functions connected with hotel work.

Recommendations for activities to be chosen go beyond suggestions to use new forms of communicating with the social environment (such as Internet games, competitions, or events with emotional impact); this part of the communication process is fairly well researched. Much less well researched is the problem of what should be selected as the content of the communication. Both recommendations from the personnel marketing sphere as well as research into CSR suggest some content that can be useful for the creation of value for employees, but advice here is far from comprehensive.

As is commonly known, employer brand management means that a company creates value for potential employees basing on the fact that a brand has value beyond its functional benefit. The results of research into consumer brands (brand equity) suggest that in creating benefits, both functional (instrumental) qualities and symbolic qualities connected with the company's brand are important.

However, only some of the symbolic benefits delivered by an employer brand arise from the influence of a company's consumer brand (Keller, 2003; Cable and Turban, 2003; Gomez and Neves, 2010) and some (or most) of them have to be created independently.

Recruitment literature emphasizes that data concerning what the Employee Value Proposition should contain in order to strengthen a company brand is limited (Lievens and Highhouse, 2003). Knowhow transferred from the field of consumer marketing would indicate that the functional benefits of a job - salary, organizational issues (localization, working hours, flexibility and accessories), development and promotion opportunities - should be differentiated from symbolic benefits (e.g. perceived prestige of working for this employer, or the fit between company values and values important for the employee's sense of identity) and that both kinds of benefit are equally important.

Research over a variety of brands consistently shows that the impact of both kinds of benefit is similar in strength. Lievens researched the impact of the Belgian army as employer and found that instrumental (functional) traits⁸ explained around 40% of variance concerning the army's attractiveness in the opinions of possible candidates, while symbolic traits⁹ explained about 30% (Lievens, 2007). Instrumental traits were more important at the stage when candidates were making the decision to apply for work (as opposed to potential candidates and those already employed), while symbolic values were equally strong in all three groups (Lievens, 2007: 62).

Analogous research conducted on a sample of bank employees and students showed the impact of both groups of qualities to be similar (explaining ca. 16% of differentiation in attractiveness in each of the groups (Lievens and Highhouse, 2003). However - in contrast with the army - the most important non-instrumental factor making the bank attractive as an employer was its image as an innovative and competent company (Lievens and Highhouse, 2003).

The company website is the basic tool for transmitting selected content to candidates, and the possibility of publicizing information about the culture and everyday activities of an enterprise is one of the advantages of using it for communication during the recruitment process. If a company's image is positive, then by using standard tools to attract interest in job openings and the help of brand ambassadors, the company can persuade potential candidates to acquaint themselves with its website. The greater capacity of Internet connections means that companies can place more information on their sites and use a richer array of means to transmit them: films, testimonials, blogs, or games. As has been shown in the case of classic recruitment, more information, richer means of transmission and more individualization increase the attractiveness of job openings in the eyes of candidates (Yüce and Highhouse 1998). And since there is almost no limit to the amount of information employers can place on their websites, to motivate candidates appropriately it has become essential to identify the kind of information that creates an attractive company image.

Two theories explaining an organization's attractiveness for candidates during online recruitment

Researching the attractiveness of a company's image for online recruitment is a comparatively recent issue. Findings have shown that candidates' appraisals of the attractiveness of online job openings are affected by both the formal properties of the advertisement (Allen, Mahto and Otondo, 2007), as by the content of the website. In both areas, research has been conducted within two theoretical paradigms (Braddy et al., 2009; Pfieffelmann, Wagner and Libkuman, 2010): cultural fit theory (Kristof-Brown et al., 2005; Edwards and Billsberry, 2010), and signalling theory (Spence, 1974; 2002; Connelly et al., 2011).

8 In this case: salary, additional benefits, job security, travel opportunities, physical activity, teamwork, promotion opportunities and a structured work environment (Lievens, 2007). The most significant factors for applicants and for employees were structured environment, educational opportunities and job security (Lievens, 2007: 61).

9 Researched basing on the 5 factor model described below. The most significant factors for applicants were prestige, challenges and candour, while for those working in the army - competence, candour, and challenges (Lievens, 2007: 61).

These two theories refer to different mechanisms of building an organization's attractiveness, and may thus lead to different predictions. For example, according to cultural fit theory, if information is compatible with a candidate's values, it will increase the attractiveness of the company in his or her eyes, leaving other candidates neutral. In signalling theory, every piece of information about a company reduces information asymmetry, and thus favours appraising the company as attractive. Woźniak (2014, in this volume) shows that each theory adequately describes the influence of different kinds of information: cultural fit theory explains positive phenomena, while signalling theory explains negative phenomena.

Both theories treat of how information influences perception of attractiveness, but do not consider the issue of the intensity of the effect of information. The goal of our research is to show that even not very important information about an organization can significantly increase employer attractiveness for candidates. In particular, low-cost signals were shown to be relatively significant in this respect, which weakens the basic premise of signalling theory that signals need to be costly (otherwise they could be faked). This partially explains why signalling theory is not useful for describing the effect of positive information about an employer.

Research premises and hypotheses

The goal of the study was to determine whether information about sponsoring activities on a company's website increases its attractiveness as an employer. These sponsoring activities did not provide any direct (functional) benefits to employees.

Sponsoring is defined as "a form of communication between businesses and the market, in which the enterprise supports such areas of economic and social life such as sports, culture, science and education, or philanthropy, to showcase its image and achieve marketing objectives" (Datko, 2012: 34). In contrast to patrons (with Maecenas as a classic example), whose aim it is to act in the interests of society and so who do not in principle need to advertise their support, sponsoring requires that this support be made known to the public (or, more precisely, to the company's potential clients). At the same time, everyone is aware that the aim of the company supporting some activity is to improve its image in the eyes of the public, and thus that the support is manipulative (deliberately chosen for the purpose of maximizing the company's own benefit and not the benefit of its social environment). In this sense sponsoring is - despite any apparent similarity - the opposite of activities in the area of Corporate Social Responsibility, where company funds are expended on non-business activities with no business goals intended.

From the perspective of the two theories used by the managerial sciences to explain how information affects employer attractiveness, sponsoring should have different effects on appraisals of attractiveness by candidates (it only relates to symbolic benefits, so functional benefits will not change described patterns). According to signalling theory, symbolic signals will have an equally strong effect on all employees, regardless of candidates' values (just slightly increasing employer attractiveness). According to cultural fit theory, company attractiveness increases only for candidates who are involved in a similar field (e.g. sponsoring of sports for those involved in sports, or a cultural sponsorship for those interested in culture). However, the manipulative nature of the sponsor's investment should significantly weaken this effect - sponsoring does not meet this theory's condition of fit between the values of company and candidate, as the field sponsored is not espoused as a value of high importance for the company. Both these explanations show that information about sponsoring

should at most have a weak effect on increase in company attractiveness. In addition, we should expect that the lower the candidates' confidence in the trustworthiness of capitalist entrepreneurs, the higher their scepticism concerning the values companies purport to support through sponsoring.

This relationship will be significantly modified if employees are offered specific functional benefits connected with a sponsorship. Benefits in this case will have an effect on persons espousing a given value (cultural fit theory), as well as on neutral persons (signalling concern for the welfare of employees).

H0. Information that a company is involved in sponsoring does not strongly increase its attractiveness as an employer for candidates.

H1. Candidates who are sensitive to a value connected with the company's sponsorship will consider the employer more attractive.

H2. The above effect is stronger in candidates who have confidence in capitalism than in candidates who do not.

H3. Offering (functional) benefits connected with a given area of sponsoring will significantly increase candidates' assessments of a company's attractiveness, regardless of the form and material value of the benefit. This increase will occur among both candidates who espouse a given value as those for whom it is neutral.

For this analysis, areas of sponsoring were chosen that are of benefit for society—cultural and sports events—and sponsoring was operationalized as a company's involvement in activities in these areas. Support for employees' health-related activities (an image-building activity not of a sponsoring nature) was the control variable. These activities were chosen as they could be measured for either the purely symbolic benefits they provided (e.g. sponsoring a sports figure), or for a mix of symbolic and functional benefits (e.g. sponsoring a sports figure and providing tickets to his/her matches).

In addition, the company description included examples of sports activities, cultural activities and activities related to employee health, which however were compulsory—e.g. employees are obliged to play a sport, co-finance flu vaccinations, or engage in cultural pursuits. On the one hand, these are participatory benefits and thus advantageous for employees who are interested in them. On the other, the element of coercion (some were highly oppressive, such as covering only half of the cost of weight loss programs for the overweight) should be considered abuse of power and negatively evaluated by employees.

H4. Abuse of power by the company will have a negative effect on an employer's image.

H5. This effect will be greater for candidates who do not espouse values connected with the area in which the abuse occurs.

H6. Among opponents of capitalism, individual values will not modify the influence of mandatory "benefits" partially financed by the employee, i.e., the impact of the latter will be similar regardless of a candidate's values.

According to signalling theory, the strength of the relationships in hypotheses H4-H6 should be modified not by the candidate's values (or at least the influence of values should be small), but by their confidence in the information the company posts about itself. Those candidates who more strongly perceive the company's communication with its social environment as manipulative should be more sensitive to information about company expenses for functional benefits as compared with expenses for symbolic benefits, than candidates who treat such communication as deliberate and sincere. It is assumed that a good operationalization of the lack of confidence in a company - and what follows, treating its communications as

manipulative - is the respondent's belief that 'enterprises always strive solely for their own profit'.

Methodology and research procedure

Our research rests on the assumption that candidates believe companies deliberately, if imperfectly, shape their own image; any information they offer about themselves and job openings (in particular, on their websites) is therefore not necessarily credible. Candidates' general attitude to capitalism modifies assessments of credibility: the more candidates consider companies to be striving solely for their own benefit, the more they will consider information the latter offers as untrustworthy. In particular, information about the company's involvement in areas that correspond with the candidate's values will not increase the attractiveness of company openings, as it will be considered untrustworthy.

In order to eliminate the effect of fear of unemployment on candidates' assessments, respondents were told that they had several equally attractive job openings to choose between, and their task was to select which company they would give first place to when applying. In addition - to prevent respondents focusing on the issue of sponsoring when assessing attractiveness - information about sponsoring activities was only one of several types of information made available about the company (such as higher salaries than the competition's, or activities on behalf of employees or local communities).

The questionnaire-type study took place in a college lecture room; subjects were 81 management and psychology students, ca. 30 years of age. On a 5-point Likert scale they rated their desire to apply for work to a given organization, under the influence of information on its website. All respondents were employed, and their age and studies indicate that they were in the early stages of their professional careers. The choice of respondents was dictated by the universally recognized higher sensitivity of youth to values.

To measure the importance of values from one of the two areas researched - culture or sport - candidates declared how often they engaged in activities related to the given area, by answering such questions as "how often do you go to the cinema?" or "how often do you watch sports events?" Additionally, a distinction was made between active and passive participation in sporting activities, as a measure of sports-oriented personal values: for instance, watching sporting events on TV vs playing games themselves. Attitude to capitalism was determined with the use of two questions: "companies always strive solely for their own benefit" and "everything companies say serves the goal of acquiring consumers".

Research results

The impact of sponsoring a cultural event on employer attractiveness.

The data in table 1 (next page) illustrates the effectiveness of using cultural sponsoring to increase the attractiveness of a company as employer. Contrary to hypothesis 0, sponsoring leads to a growth in company attractiveness. Consistently with hypothesis 1, this impact is stronger, although still fairly weak, for persons who espouse values connected with the sponsored area.

Table 1. The impact of cultural sponsorship (sponsoring a cultural activity) on employer attractiveness among culturally oriented and not culturally oriented (the answers: “very strongly increased” and “strongly increased” are calculated together)

Questionnaire item	Culturally oriented (“I often take part in cultural events”)	Not culturally oriented (“I seldom take part in cultural events” or “I sporadically take part in cultural events”)
1. “The company is a sponsor of some cultural events”	10 (39% from 26 sport oriented)	15 (27% from 55)
2. “The company gives employees free tickets for cultural events that it sponsors”	17 (65% from 26 sport oriented)	28 (51% from 55)
3. “The company sells employees tickets at half price to cultural events that it sponsors”	11 (42% from 26)	19 (35% from 55)
4. “The company organizes a lottery for 5% of its best employees with a trip to the Cannes Film Festival as the prize”	17 (65% from 26)	31 (56% from 55)
5. “The company obliges its employee to participate in cultural activities”	6 (23% from 26)	7 (13% from 55)

Employee benefits connected with a cultural activity (e.g. weekly cinema tickets for free or at half-price) will not change a company’s attractiveness for only 12% of respondents (data for these questions are not included in the tables in this article). For the remaining 78%, company attractiveness will increase, and most strongly for persons who are frequently involved in cultural activities. For over 40% of respondents, company attractiveness will grow strongly or very strongly, while for the remainder such growth was declared by around 30% of respondents. This result confirms hypothesis 3 (compare items 1 and 2).

Similar results were obtained for sponsoring of sports events (see table 2). It is worth noting that sponsoring local events increases (in comparison to Polish football team) the attractiveness of a company for around 50% of candidates, regardless of their involvement in sports (so even more clearly than in the in the table 2 below – data not included in the article).

Table 2. The impact of sport sponsoring on sports-oriented and not sports-oriented on increase of employer attractiveness (“increased” and “strongly increased” are calculated together)

Questionnaire item	Sports-oriented (“I am active in sports – professionally or for pleasure” – agree or partly agree)	Not sports-oriented (disagree or partly disagree)
1. “The company is the main sponsor of a Polish football team”	17 (31% out of 54 sports-oriented)	5 (20% out of 26)
2. “The company financially supports a local sports team (volleyball)”	28 (52% out of 54 sports-oriented)	12 (46% out of 26)
3. “The company support financially sport team and gives free tickets for its’ sport events to employees”	29 (54% out of 54 sports-oriented)	12 (46% out of 26)
4. “The company financially supports a local sports team and distributes tickets for half price for its’ sports events to employees”	17 (31% out of 54 sports-oriented)	12 (46% out of 26)
5. “Employees can draw a free ticket for the company’s sponsored sporting event as a lottery prize”	35 (65% out of 54 sports-oriented)	20 (77% out of 26)
6. “The company obliges its employees to participate in sports”	20 (37% out of 54 sports-oriented)	17 (65% out of 26)

It is worth noticing the data in both which supports hypothesis 4 (table 2, items 4 and 6, and table 1, items 3 and 5), as the increase in attractiveness is much lower than is the case with other types of sponsorship. A stronger abuse of power lowered company attractiveness in the eyes of most respondents. Company attractiveness was decreased both by compulsory sports (in the case of 70% of respondents), and by co-financed weight-loss programs for the overweight (75% respondents). No-one felt that these benefits increase company attractiveness. Deducting 5% from the salaries of smokers brought a slightly different response - 30% of respondents considered that this increased employer attractiveness, and this feeling was stronger among those who do not have confidence in capitalism. 60% of respondents considered that co-financing obligatory flu vaccinations lowered company attractiveness, while only 20% felt that it slightly increased the latter. It is also worth noting that the question: "The company sells its employees tickets at half the price to cultural events that it sponsors" evoked a strong negative reaction - 100% of respondents considered that this lowered the employer's attractiveness.

The problem of trust in the company's intentions is illustrated by two tables below. Table 3 shows that the level of anti-capitalist attitudes changes the strength with which company attractiveness increases. For example, being a sponsor increases attractiveness in ca. 26% of the strongly anti-capitalist group, but in 20% of the pro-capitalist group and 30% of the neutral group. The data from table 3 below gives similar conclusions.

Table 3. The impact of sponsoring sports activities and cultural events on employer attractiveness in groups with different level of trust in capitalism ("everything companies say serves the goal of acquiring consumers")

Attitude towards capitalism	Photo of sponsored sportsman			Sponsor of national team			Sponsor of cultural events			total
	Increased and strongly increased	No change	Decreased	Increased and strongly increased	No change	Decreased	Increased and strongly increased	No change	Decreased	
Strongly agree "anti-capitalists"	7	12	0	5	13	1	17	2	0	19
Rather agree "neutral"	11	27	4	13	26	3	31	10	1	42
Disagree "pro-capitalists"	7	11	2	4	14	2	17	3	0	20

However, as table 4 shows (next page), if they trust in capitalism, the information about sponsoring raises opinions about the company's attractiveness in about 20% of respondents, compared with 24% if they do not trust. But if additionally they are sports-oriented, every second (5 out of 11) respondent who trusts in capitalism considers the company's attractiveness increases if the company sponsors sporting activities, in comparison with respondents who do not trust in capitalism and are active in sports. Only 5 out of 15 of the latter consider sponsoring to increase a company's attractiveness. This data supports hypothesis 2.

Table 4. The impact of sponsoring a sport event (“The company is the main sponsor of a Polish football team”) on employer attractiveness in groups with different levels of trust in capitalism and different levels of sport-orientation

Trust in capitalism	Change in company attractiveness	“I engage in sports activities”			Total
		Frequent sporting activities	Once a month – infrequent sporting activities	Sporadic sporting activities	
Lack of trust “Everything companies say serves the goal of acquiring consumers” – “yes” and “rather yes”	Increased attractiveness	5	3	3	11
	Remainder (mostly unchanged)	10	9	15	34
Trust - “Everything...” – “no” and “rather no”	Increased attractiveness	5	0	2	7
	Remainder (mostly unchanged)	6	16	7	29
	TOTAL	26	28	27	81

It might seem surprising that the study did not confirm either hypothesis 5 or 6. Regardless of respondents' attitudes to capitalism and how involved they were in sporting activities, over two-thirds in each sub-group considered that the obligation to take up sports lessened the attractiveness of the company as an employer (data not included in the tables).

Discussion of the results

The results indicate that we should return to the problem underlying the research: that of the role played by signalling and cultural fit theories in explaining the effect sponsoring has on making a potential employer more attractive. The above data shows that confidence in information published by companies, or in capitalism in general, does not have a modifying effect on negative information - and hence signalling theory would be more relevant for explaining assessments of attractiveness. Respondents - regardless of their confidence in the information companies disseminate in their social environment - assess all kinds of information in a similar way, i.e., each piece of information that could be interpreted as limiting the freedom of employees is a signal that employees are badly treated by the company, and thus that the company is not a desirable employer.

A second important result - disproving hypothesis 0 - is that every form of sponsoring seems to be effective. Regardless of the size of the contribution, information about cultural or sports sponsorship increased the company's attractiveness as an employer. This attractiveness rises if - over and above the symbolic benefits (working for a company that is a sponsor) - employees receive even small functional benefits of material value. Consistently with cultural fit theory, this increase is more pronounced in persons for whom the value is of significance on a daily basis. The latter theory also gives a good explanation of the increase in employer attractiveness in candidates who benefit materially from the sponsoring. However - inconsistently with cultural fit theory - symbolic benefits have a positive influence for all candidates, so sponsoring (an activity by definition manipulative) is an effective method of building a positive employer brand.

Stating that cultural fit theory is more adequate for positive and signalling for negative information, however, fails to take into consideration the situation when employees are to participate in covering the costs of a benefit. The respondents' answers indicate that caution should be observed when informing candidates about this form of benefits - candidates appear to treat them as a form of coercion of employees. A factor influencing respondents' answers may have been the context of the questions about co-financing in the questionnaire. They were posed in a section with others concerning complete financing of benefits and in this context, co-financing could have been treated as obligatory payment for something that should be free. Some of the questions in the study were used for controlling other ways of positive image building. Candidates prefer the company to increase wages or finance additional benefits on their behalf to its making expenditures on benefits of a vague nature, i.e. sponsorship or CSR. This interpretation is supported by the fact that offering a 10% higher salary than its competitors increased a company's attractiveness 'strongly' or 'very strongly' in the eyes of 86% of respondents, as did awarding high bonuses to the 20% of employees with the highest performance appraisals. The specific situation of young employees in Poland, struggling with high financial needs, may be the source of their strong feelings about receiving direct material benefits from their employers.

Summary

This text has attempted to verify which of two theories describing the mechanisms of appraising employer attractiveness is better suited for explaining the impact of information about sponsoring. Its premise (a refutation of H.0) was that even small outlays on various kinds of sponsoring can increase a company's attractiveness not only to acquire consumers, but also to acquire employees.

The questionnaire given to potential candidates confirmed our main premise that almost every piece of information about a company's activities increases its attractiveness as an employer. The goal of sponsoring for a company is to improve its image in the eyes of consumers. However, sponsorship also increases its attractiveness for its employees, and informing candidates about sponsoring activities on the company website plays a motivational function during recruitment.

Analyses of the impact of sponsorship have shown that information about sponsoring which has a positive value for candidates affects them through the cultural fit mechanism. In other words, it increases the attractiveness of a company more strongly in the eyes of candidates who profess values related to the sponsored area. On the other hand, the impact of information valued negatively by candidates can be explained with the use of signalling theory (which is consistent with another of the author's texts, in this volume). It is shown that information suggesting coercion of employees is treated as negative information, independently of whether the 'coercion' concerns co-financing benefits, mandatory participation in weight-loss programs, or compulsory sports. Contrary to our hypotheses, confidence in company communications, or in capitalism as such, does not modify respondents' appraisals; it seems rather that they treat the information on company websites as reliable, regardless of their general beliefs regarding capitalism as such.

The results outlined above are both theoretically significant, and of importance for management practice. From a theoretical perspective, we have shown that the two theories analysed provide complementary explanations for e-recruitment situations. As for management practice, our results indicate that placing easily accessible information about the

company's sponsoring activities on its website is valuable both from the perspective of human resource management, as consumer marketing. At the same time, there is no indication that sponsoring expenses need to be large, particularly if the activities also provide direct benefits to employees (e.g. in the form of tickets to a sponsored event, or contact with celebrities participating in events for employees). The second important recommendation for managerial practice is connected with participatory benefits. The results of the study suggest that companies should exercise caution when informing candidates about mandatory participation in benefits, as respondents appear to value such information negatively.

An obvious limitation on the generalizations formulated here is the small size of the sample and its specific social make up. The sample group was composed of persons who were at the beginning stage of their professional careers and who were active in a labour market that does not provide employees with sufficient financial rewards to satisfy their needs. As the respondents in such a sample group have an increased sensitivity to the financial benefits they could receive as employees, this could affect the manner in which they make appraisals. Such an interpretation is also suggested by the fact that their general opinions on the reliability of company image communications do not appear to influence their interpretation of specific information concerning company activities.

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The effect of a company's involvement in environmental issues on attractiveness for candidates during e-recruitment – two theories

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Abstract

E-recruitment is the fastest growing group of recruitment methods. However scientific theory concerning factors affecting perception of a company as an attractive place of work in e-recruitment, are still poor. Research into corporate social responsibilities (CSR) shows that information that the company is involved in these areas makes its image more positive, including its image as an employer. The text analyzes the effect of positive and negative information concerning a company's environment-related activities, on its employer image. Data from an e-questionnaire filled in by 80 full-time young working adults show that positive information affects candidates according to the cultural fit model, while negative – according to the signaling theory model.

Introduction

At present, e-recruitment is the most rapidly growing fragment of the recruitment field (Listwan, 2010), with candidates and employers having to deal with increasingly fewer barriers of access to the Internet. The variability of its methods however creates difficulties for understanding it in a scientific manner, and for developing effective management directives. This constitutes a barrier to its dissemination, and lack of competence on the part of employers is frequently cited as one of the barriers to its becoming universal.

Recruitment research has shown that candidates are influenced not only by instrumental factors (i.e. the package of direct benefits they will receive as employees, such as salary, localization, kinds of tasks, or development and promotion opportunities). Also significant are the less measurable symbolic or image-related advantages, such as the values the company espouses – related to environment, social consciousness, or care for marginalized groups in the global economy. One of the means that enterprises frequently reach for when using symbolic factors to create a positive image, is to engage in activities from the field of Corporate Social Responsibility (CSR).

The goal of this article is to verify which of two vying theories that describe the e-recruitment process – cultural fit and signaling theory – more adequately explains the changes in how a candidate perceives a company's attractiveness, when given information about its involvement in environment-related activities. This area of CSR-related activities has been chosen as research into how information about it affects candidates has yielded diverse results. Additionally, the effect of environmental values, considering their significance for younger generations, should – from the perspective of one of the above two theories – be on the increase.

The two theories offer different reasoning to explain how image-related information increases a company's recruitment impact. The task of this article is to show that each of them describes the effect of different kinds of information, and so in fact they complement each other rather than compete in explaining the value of symbolic information in the recruitment process.

The text is organized as follows. The first part describes e-recruitment and its potential in Poland. Part two details the four stages in the development of e-recruitment tools, with a summary of their advantages and limitations (a broader description of this problem is to be found in another of my works – Woźniak, 2013). The third part explains how cultural fit and signaling theory are applicable to the recruitment process. Part four is devoted to the premises of two studies conducted, the hypotheses and methodology used. The final part of the text contains the results and conclusions.

Online recruitment – scope and definitions

“Obtaining candidates for employment through the Internet, so-called e-recruitment” is a dynamically developing group of recruitment methods (Listwan, 2010: 120). Although Poland is not a leader in the use of new technologies (Runiewicz-Wardyn, 2008), Internet access has ceased to be a restriction for employers who wish to use the tools of online recruitment. According to the Polish Central Statistical Office, by 2011 over 95% businesses had such access (for further data, cf. Woźniak, 2013). The situation is worse for potential employees: lack of Internet access excludes 1/3 of Poles from taking advantage of online recruitment. However, lack of Internet access is currently significant only for persons over 60 years of age (as many as 80 out of 100 Poles in this age group do not use the Internet). In the remaining age groups, lack of Internet access is fairly similar and affects a little under 1/3 of each group. There is almost complete Internet access among persons with a higher education; slightly less (around 85%) among those with secondary school education; still less among those with a vocational education (46%); and considerably less among persons with only an elementary school education (23%) (Woźniak, 2013). Although these statistics suggest that online recruitment is better suited for hiring persons with a higher education, employers do not limit its use to university graduates or to persons aspiring to work in high-tech professions (considered a leader in this type of recruitment method). Proof of this may be that the most frequently published advertisements on recruitment websites are for employees without higher education (ca. 600,000 advertisements in 2011 were for cashiers, salespersons, and drivers), and an analysis in the terms of the positions offered shows that the most frequently sought employees are drivers and construction workers (Zajac, 2012).

A precise definition of online recruitment cannot simply take use of the Internet as its distinguishing feature. Just as e-learning is not a matter of sending e-mail invitations to trainings, so e-recruitment cannot be equated with sending invitations for interviews or rejecting applications via e-mail. To consider a recruitment activity as e-recruitment, a ‘significant portion’ of the recruitment process must take place online.

Thus e-recruitment is defined as “a way of implementing [recruitment] strategies, policies, and practices in organizations through a conscious and directed support of and/or with the full use of web-based channels” (Girard and Fallery, 2010:1). Such a definition emphasizes the use of the Internet not for peripheral human resource activities, but for core issues. In the case of recruitment, this signifies web-based implementation of recruitment plans which includes locating potential candidates (labor market segmentation), contacting them and collecting information about them that is necessary for the selection process.

Four stages in the development of e-recruitment

In an attempt to categorize e-recruitment into stages, we propose a typology based on the kind of communication that takes place between its participants. This lets us distinguish the four

stages of e-recruitment described below, termed *Web* and given successive numbers, analogously to terminology developed for the stages of Internet communication. At the same time we will show that a good employer image is necessary for recruitment activities to run smoothly at each of these stages. Initially, the Internet was used just like the printed press, to place recruitment ads (Web 1.0). In this period, the only actual difference in comparison with printed media was that employees could search the websites of employment agencies (such as Monster.com, the Polish Jobpilot.pl, or pracuj.pl). These services corresponded to a traditional search through the classified advertisements of the press – the 'help-wanted' section in the case of recruitment.

E-recruitment, however, has significantly modified not only the implementation of tasks in the recruitment sphere, but also the nature of these tasks (Woźniak, 2013). This was already taking place in Web 1.0; currently the greater capacity of Internet connections allows enterprises to place more information on their websites and use a richer variety of methods such as films, testimonials, blogs and games – for transmitting it. Traditional recruitment had already confirmed that more information, richer means of transmitting it and greater individualization increase the attractiveness of job openings in the eyes of candidates (Yüce and Highhouse, 1998).

Web 2.0 recruitment (like everything termed Web 2.0 in Internet terminology) is connected with the use of material created spontaneously by participants in online communities. Along with the emergence of social networking sites and other forums where users can express themselves and place material they have created themselves, the number and scope of such sites is continually growing. By definition¹⁰ the Web 2.0 model differs from Web 1.0 in its elimination of the distinction between privileged broadcaster of information and recipient. In principle, the activity of developers of Web 2.0 sites such as Facebook, Nasza Klasa or Allegro is limited to creating and controlling guidelines for users. The content of the website is created by the users themselves, as they communicate with each other and – in particular – make personal information about themselves available to other members of society.

Hence, we speak of Web 2.0 recruitment when a potential employer actively seeks material – other than job-wanted advertisements – placed on the Internet by other users. Typical tools used in Web 2.0 recruitment are social networking sites of a private (such as Facebook) or professional type (Linked, IN), video platforms such as YouTube, virtual worlds of the Second-Life type, and search engines analyzing data from various areas of the Internet. In this understanding of Web 2.0 recruitment, emphasis is placed on searching for information generated – usually without an open connection with seeking employment – by potential candidates, for the purpose of finding interesting candidates, acquiring pre-selection information and possibly for making contact.

If a main feature of Web 2.0 recruitment is the unilateral nature of communication (recruiters sift through others' communication with the purpose of finding potential candidates), then the active development of Internet communication focused around potential employers (Jeffrey,

¹⁰ The concept of Web 2.0 often seems to be used as a marketing ploy. It is pointed out that social networking sites make use of IT tools that have long been available on the Internet, and its users' activity is overrated. Data shows that "only a small percent of Web 2.0 users generate their own content. According to [...] Hitwise (research from 2007), 16% of YouTube users send films, 2% send photos to Flickr, and 4.6% of Wikipedia visitors publish there." (wikipedia.en, 'Web 2.0', accessed 01.07.2012).

2012:9) naturally becomes the differentiator of Web 3.0 recruitment¹¹. Dialogue with Internet users – either directly encouraging them to apply, or creating groups focused in various ways around the company, with the purpose of using these connections for recruitment – is the characteristic feature of bilateral (or multilateral) Web 3.0 communication.

Usually, employer branding activities are focused on creating a group with a positive attitude toward the organization and a greater acquaintance with its problems (brand ambassadors) (Woźniak 2013), but achieving and maintaining rich relations between a company and groups in its environment ordinarily requires bilateral communication, which in large measure takes place online. In particular, the Internet facilitates the use of tools suitable for gamification. A classic example is the Marriot Corporation's recruitment site, which apart from job openings has a game which involves virtually performing various functions related to hotel work.

The next stage in the development of e-recruitment instruments – Web 4.0 recruitment (Jeffrey 2012: 9, 13) – “automatizes” the search of social networking sites, and puts the search for appropriate candidates and encouraging them to apply in the hands of a crowdsourcing mechanism. The tasks of recruitment are therefore transferred to a group of entities with imprecisely defined boundaries¹². Just as companies ask their employees to recommend potential candidates, so Web 4.0 recruitment gives this task to Internet users, based on the assumption that even small rewards to recommenders whose referrals are hired encourage Internet users to search for and submit many candidates. Automatic online pre-selection tools help deal with the excess of applications, which in previous e-recruitment methods¹³ overburdened recruiters with work. These (including tests filled in on-line and computer programs automatically monitoring the adequacy of formal qualifications) are able to select without cost a small pool of candidates, who will presumably possess a close approximation to the desired qualifications.

A prerequisite for the successful crowdsourcing of recruitment, it should be emphasized, is that the company has a positive image in the eyes of the group to which the information is addressed (both potential recommenders and referrals). This signifies that contact with the target group has to be ongoing, in particular the routine work of developing company image – from running blogs, through moderating discussions on online forums, to activities in communities of practitioners. For this reason, Web 4.0 recruitment decreases the work of the personnel department only in a superficial manner. Additionally, the fact that a company

¹¹ Sometimes Web 2.0 is considered to be every type of multilateral internet communication (Girard and Fallery, 2010), and the real change to Web.3 is brought about by crowdsourcing. The latter, in conjunction with the use of games, allows recruitment departments to be transformed from cost centres to profit centres. Advertisements targeted at users of games, knowledge centres, etc. considerably lowers recruitment costs and adds value. After: www.ere.net/2011/08/10/recruitment-4-0-crowdsourcing-gamification-recruitment-as-a-profit-center-and-the-death-of-recruitment-agencies/ (accessed 01.10.2012).

¹² Well-known examples of crowdsourcing are community activities of the Wiki type (e.g., Wikipedia). An elegant example of the joining of crowdsourcing and gamification was asking Internet users in 2011 to verify the digitalization of the Finnish National Library. The digitalization program made errors in recognizing many words, and finding these errors was part of a game offered by the Library. The game attracted 55,000 persons (after: gryfikacja.pl).

¹³ Listwan (2010:121) and Armstrong (2011:457), among others, point to the excessive number of applications as a drawback of online recruitment. According to data from 2003, 92% of HR managers feel overwhelmed by inappropriate e-applications, and 71% complain that the majority of applicants do not meet the requirements of the position (after Maurer and Cook, 2011: 107). Research into online recruitment has also shown that organizations considered attractive on account of their brand recognizability or their good reputation, receive a higher percentage of applications from candidates who do not meet the prerequisites of the job.

needs to have a positive image in its social environment means that recruitment by these methods may be more difficult for some enterprises than for others.

Corporate Social Responsibility and creating a positive image during e-recruitment

Using new methods of communicating with the environment – such as internet games, competitions or emotionally-laden information – constitutes only a narrow fragment of recommendations for employers on how to build corporate image. Often very specific communication content, accompanied by activities which are to demonstrate its authenticity, are postulated. Personnel marketing as well as CSR research suggest that value for employees is created through both the functional (instrumental) as the symbolic features of the company brand.

Employer brand management signifies creating value for potential employees, with reference to the fact that brand carries value over and above functional benefits and that the value of the employer brand may be affected by the consumer brand (Keller, 2003; Cable and Turban, 2003; Gomez and Neves, 2010). Recruitment literature stresses that defining the content of the Employee Value Proposition so as to strengthen the company brand is not a simple matter, among others because knowledge of the subject is limited¹⁴ (Lievens and Highhouse, 2003). Transposing deliberations from consumer marketing to a product such as the employer requires differentiating the functional features of the job from its symbolic value. The former are salary levels, organizational components (place, times, flexibility, length of working hours, how the workplace is equipped, material benefits, etc.), and potential for growth and promotion. The latter – the prestige of working for a given employer, or the image that a certain job carries for different social groups, or how consistent the job is with the image one has of oneself.

Research into the advantages of each of these two groups brings consistent results across brands, and shows that their influence of both is similar in strength. Lievens, who studied the strength of the employer brand on the example of the Belgian army, ascertained that instrumental (functional)¹⁵ features explain ca. 40% of differentiation in candidates' opinions of the army's attractiveness, while symbolic features¹⁶ – ca. 30% (Lievens 2007). What more, instrumental features were more significant at the stage when the decision to apply for work was being made (as opposed to the stage of being a potential candidate, or when already employed), while symbolic features were equally strong for each of these three groups (Lievens 2007: 62). In an analogous study carried out on a sample of bank employees and students, the influence of instrumental and symbolic factors was also similar in strength (ca. 16% differentiation of attractiveness explained by each; Lievens and Highhouse, 2003: 92, 94), although different symbolic factors were significant. Differently than for the army, the most important non-instrumental feature of the bank as employer was its image as a competent and innovative enterprise (Lievens and Highhouse, 2003: 95).

The choice of image-related information (symbolic advantages) that helps an organization to be considered attractive, is weakly grounded in theory. In the 1950s the concept of Corporate

¹⁴ “Due to the budding state of research into employer branding, it is unclear which features of consumer brands may be transposed to this area” (Maroko and Uncles, 2008: 161). The authors emphasize the difference between consumers and candidates to support their belief that these factors may differ.

¹⁵ In this case: salary, benefits, job stability, travelling possibilities, physical activity, education and development, teamwork, chances for promotion, transparent structure (Lievens, 2007).

¹⁶ The study of a 5-factor model, described further on. Prestige, challenges and honesty were most important for candidates, and competence, honesty and challenges for those already working for the army (Lievens, 2007: 61).

Social Responsibility (CSR) was introduced, and understood as responsibility for an enterprise's impact on the environment in which it functioned, at first personified by the entrepreneur or CEO, but later taken to mean the activities of the enterprise as a whole. This company environment is generally divided into the closest surroundings (local community), own employees, the natural environment, and variously marginalized communities. The discussion whether companies should care for the well-being of their environment, as well as for their impact on it, and for what reason, is ongoing. Extreme positions – that companies should care only for shareholder profit (Friedman), and that they should adhere to the legal and moral norms of all community members “over and above” what is required – are reconciled by showing that respect for such norms (and informing about the significant costs of doing so) is advantageous to shareholders (Berrone and Gomez-Mejia, 2009). In practice organizations use CSR – understood as an umbrella concept describing several unrelated areas of the company's potential involvement – mimetically. In other words, they consider that CSR activities help in creating a positive image because some organizations and the media think this way.

It is currently common knowledge – talked of in the media and taken into consideration by the boards of large enterprises – that CSR-related activity is necessary for improving company image. However, research conducted in Poland shows unequivocally that the activity of enterprises in this field is frequently mere pretense (Leszczynska, 2011). It seems that, influenced by the media, company boards consider that even superficial or purported CSR activities will positively affect their company reputation. Although current research shows that having a good CSR-related reputation has promising effects for economic returns (Godfrey, Merrill and Hansen, 2009; cf. review of research in Woźniak, 2012: 234-237), studies usually assume that CSR investments are significant, and hence that the company will not be suspected of consciously manipulating public opinion. CSR credibility is rarely taken into account as a factor in research, as it is common knowledge that manipulation of this kind has a destructive effect on reputation.

Another difficulty to reaching a uniform position concerning the effectiveness of CSR is the fact that different areas of involvement may have a different impact on company reputation. Specifically, research into e-recruitment has shown that involvement on the part of the company does not directly increase its attractiveness (Behrend, Baker and Thompson, 2009).

Another factor that must be taken into consideration when researching the effectiveness of a company's image-building is communication between Internet users. The latter (including company employees) willingly exchange any information they have about companies, both positive as negative, also with persons they do not know (Woźniak, 2013). Hence a company's brand is never created solely through the information the enterprise shares with the public; it becomes the end result of a multitude of variously reliable messages from different sources.

Two explanations of an organization's attractiveness for candidates

Research into how company branding affects candidates during online recruitment has only just begun. As the Internet has lowered the costs of obtaining information, it has given candidates access to a broader range of information about a company than the latter offers through its intentional branding activities. A series of findings concerning how attractiveness of e-recruitment offers is assessed has shown opinions to be impacted both by the formal properties of the advertisement (Allen, Mahto and Otondo, 2007), as by the company website

itself. In both these areas, essentially two theoretical paradigms (Braddy et al., 2009; Pfieffermann, Wagner and Libkuman, 2010) that describe the mechanisms of candidates' reactions to information acquired online are used: the model of intentional rational action, and specifically Vroom's motivational theory (Lin, 2010), and Simon's theory of bounded rationality (Woźniak, 2013).

In the first paradigm, the most important theory explaining the attractiveness of an organization is the theory of personality fit, specifically Ben Schneider's Attraction-Selection-Attrition theory developed in 1980. According to this theory, fit with the organization's culture will increase its attractiveness in the candidate's eyes, as well as his or her chances of doing well while working for it (Schneider et al., 1998). This is consistent with a management phenomenon studied for about a hundred years, called "one of the most valuable motifs in psychological theorizing" (Kristof-Brown et al., 2005: 281): of how well-matched are the interactions of an individual with his or her environment. It has been confirmed many times that persons who fit in well with the value system of the organization for which they work achieve higher levels of affective variables (indices that describe their morale as employees: work satisfaction, company involvement) and behavioural variables (such as citizenship behaviour, Arthur et al., 2006).

It is increasingly accepted that organizational fit theory should be used as a basis for employee selection (Arthur et al., 2006: 788), in spite of a "lack of empirical evidence [higher productiveness of individuals fitting the organization] to support it" (ibid). In attempting to define the concept of fit, a series of differentiations and partial definitions has been developed, to describe whether an individual matches his or her vocation, job, organization, group, and superior (Kristof-Brown et al., 2005; Edwards and Billsberry, 2010), as well as to distinguish objective, perceived, or subjective fit in each of these areas.

Studies of candidates have demonstrated that they are capable of analysing information about an organization's culture presented online (Braddy, Meade and Kroustalis, 2006). In most cases, fit theory has proved useful for explaining the attractiveness of a given employer brand, though some types of information have a different effect from what the theory predicts. Only for women did a perceived fit with the organization's culture correlate with a perception of the organization as attractive. No such dependence was discovered among men (Pfieffermann, Wagner and Libkuman, 2010).

The second theory used to explain the effect of branding information in online recruitment is signalling theory. This theory assumes that if a social situation requires parties to act when access to information is limited and different for each of the parties, the goal of part of their activities is not so much explicit communication, as signalling certain information that it is difficult for the other party to obtain.

Research in this area has been conducted within the broader framework of economics theory, which stresses the asymmetry of information between partners on the market. Studies have shown two main areas in which this asymmetry appears – information about quality and information about intention – both of which can be found in a the recruitment context. Employers face a fair amount of uncertainty as they assess the qualities of a candidate they intend to employ, but candidates also wonder what working for the company will entail beyond what is revealed and described in the job contract. Neither side knows the intentions of the other – the employer does not know whether the candidate really wants to devote the years to come to the job (as a key step in his or her career), while the candidate does not know

what the employer has in store (in terms of contract length, career development, or specific arrangements for reconcile work and private life).

Michael Spence's signalling theory, the framework for analysing these issues, appeared in 1973. The theory makes it possible to describe why students are prepared to pay the significantly higher tuition fees of famous schools, even though the quality of education between different educational institutions does not vary much. It explains that, from the employer's perspective, a definitive appraisal of a job candidate's value cannot be done *ex ante* (before the candidate has worked for the employer for a significant time). Candidates therefore provide the employer with signals by which they try to convince the latter of their high value. Investing in a degree from an expensive school constitutes such a signal, as it indicates the importance candidates attach to education and thus indirectly indicates the value they attach to work. In contrast to Becker's theory of social capital, Spence considers that the role of expensive education is not to transmit knowledge, but to send signals (lowering the risk caused by information asymmetry, Spence, 2002). The definitional 'signalling' in this theory means the selection by the party sending the signal of an easily verifiable attribute (e.g. a degree from an expensive school) as an instrument of transmitting information about intangible traits that are hard to verify, and can be assessed only with a high degree of uncertainty. For the recipient of the signal, the conclusions reached on the basis of the information transmitted by the signal must be advantageous – the signalling has a strategic effect. In the absence of any such signal, the recipient would have difficulty in engaging in any of the courses of action open to him/her, as uncertainty concerning its consequences would be significant.

This claim – that the sender significantly decreases the recipient's uncertainty concerning the consequences of a possible course of action by sending a specific signal, and that this action is in the interests of the sender – is key to signalling theory. To consider this claim true, we need to accept the premise that the costs incurred in order to send this signal have to be high. The result otherwise would be a mass sending of untrue signals, and any conclusions based on them would be false. For this reason, Spence's theory is sometimes called “the theory of sending expensive signals” (Connelly et al., 2011: 45). Hence credibility of the signal is a significant variable, which needs to be taken into consideration during analysis.

In the case of recruitment, signalling refers to information – available and interpreted by both company and candidate – indicative of other features than those purportedly described. In other words, pro-environmental activity is a signal for high quality of the workplace, and anti-environmental activities – are a signal for low quality of the job. Hence within the framework of signalling theory, positive information about the company will increase its attractiveness, and negative information will decrease its attractiveness for all candidates, irrespective of candidates' environment-related values.

Research methodology and hypotheses

The goal of this study is to understand how the attractiveness of the jobs an organization offers depends on the similarity between company values and those of the candidate.

Assuming the fit between the candidate and company to be otherwise adequate, presenting itself as pro-environmental should increase the company's attractiveness for candidates who declare pro-environmental values, both when these are only of a general nature, as -more

significantly- when candidates declare their actual involvement in pro-environmental activities.

H1. Candidates who declare pro-environmental values should find companies which provide information about their pro-environmental activities more attractive, than candidates who do not declare such values.

This effect should be symmetrical. In other words, providing information about a company's pro-environmental activities should increase its attractiveness, and providing information about its anti-environmental activities should decrease its attractiveness in the group of subjects who are sensitive – on account of the values they profess – to this type of information.

H2. Candidates who declare pro-environmental values should find companies which provide information about their anti-environmental activities less attractive, than candidates who do not declare such values.

Our research also assumes that candidates consider enterprises to use their websites actively, if imperfectly, for the purpose of shaping their own image, and thus that information to be found on company websites about them and the conditions of the jobs offered are variously reliable.

The assessment of a company is also shaped by candidates' general attitudes toward capitalism. The more candidates consider profit to be the only goal of entrepreneurship, the more they will treat the information the company provides as unreliable. So – regardless of other values they espouse – information about the company's involvement in activities that correspond with their values will not increase the attractiveness of a the job opening, as the information will be seen as unreliable.

The reliability of information for a candidate modifies its effect – the less trustworthy the information, the weaker its influence will be. This trustworthiness of information is a result of its nature (e.g. general vs specific) or of the receiver's mind-set (e.g. trusting or mistrustful) - cf. hypothesis 4.

Groups in which specific examples of pro-environmental activities are provided by the company should on the other hand differ from groups which are informed that the company adheres to general 'pro-environmental principles' in its operations. This difference should be stronger in persons with a lower level of trust in capitalism (see below).

H3. Examples of specific pro-environmental activities will increase a company's attractiveness more than information about its general endorsement of pro-environmental principles, particularly among persons who are pro-environmentally involved.

The strength of this correlation will be modified not by the candidates' values, but by their confidence in the reliability of the information the company provides. Candidates who more strongly perceive a company's communication in the terms of manipulative signals, should be more sensitive to information that reflects negatively on the company, than candidates who treat such communication as intentional and straightforward. Assuming that a good operationalization of lack of confidence -and so treating communication from the company as manipulation- is the respondent's belief that 'enterprises are only interested in their own profit' (which can be interpreted as an anti-capitalist attitude), the following hypothesis can be formulated:

H4. Information showing that a company has acted to the detriment of the natural environment decreases the desire to apply for a job more strongly in candidates who have no trust in a company's good will ('anti-capitalists'), than in the remainder.

From the perspective of signalling theory, positive and negative situations will be interpreted differently. Positive information should always increase an organization's attractiveness, but this effect will probably be strongest for persons who are involved in the given area (because greater significance will be given to this information). However, negative information should be interpreted in a similar way by all candidates, regardless of the values they espouse, as this signals that the job opening is unattractive. Signalling theory therefore provides us with the following hypothesis:

H2'. Information proving that a company has engaged in activities harmful for the natural environment should decrease the desire of job-seekers to apply, independently of whether they declare pro-environmental involvement.

H.5. Respondents' gender is inconsequential – the phenomena described in the hypotheses above apply equally to men, as to women.

A factor which could modify candidates' appraisals of a company's job openings is a strong fear of unemployment. In order to limit this effect, subjects were told that several equally attractive job offers were available to them, and they were just making a decision about their first choice. Information about the company's pro- and anti-environmental involvement was only one of several types of information about its activities provided (such as activities on behalf of employees, higher remuneration than the competition's, or activities on behalf of the local community).

The research subjects were 79 management and psychology students in an evening college course; they were around 30 years of age. All were employed, and their age and studies indicate that they were at an early stage in their professional careers. This choice of respondents was dictated by the generally recognized higher value-related sensitivity of young people. Subjects filled out a questionnaire in their lecture hall. On a 5-point Likert scale they marked the strength of their desire to apply for work, after studying the information provided on the employer's website.

Candidates' declared activities on behalf of the natural environment over the previous month were used as a measure of their pro-environmental attitudes; attitude towards capitalism was determined by their answers to two questions on whether 'enterprises always act solely for their own profit'.

Research results

The data used to verify the hypotheses is presented in table 1 (next page).

The data in the table positively verifies hypothesis 1, while no confirmation was found for hypothesis 3. Information concerning casual pro-environmental involvement (subsidizing pro-environmental activities and a declaration of general concern) increased the attractiveness of a given organization the most, while providing specific examples of involvement resulted in a weaker change. However, taking into account the small size of the test group, these differences are not large, and the above data allows us to state only that information about a company's pro-environmental activities has a stronger effect on persons who are involved in pro-environmental activities (hypothesis 1), regardless of how specific the information is (contrary to hypothesis 3). It should be noted that in both groups providing information

concerning pro-environmental activities of any type did not decrease the readiness to apply for a job, and thus the desire to apply of persons not covered in the above table could be expected not to undergo any change as a result of such information.

Table1. Percentages of respondents who will apply to the company as a first choice, based on information on its www (the responses: “strongly increases” and “increases” have been tallied together)

Questionnaire items	Increased desire to apply as a first choice among environmentally-involved respondents (n=24)	Increased desire to apply as a first choice among respondents who are not environmentally involved (n=55)
The company runs pro-environmental projects (waste recycling, reusing printing paper, etc.)	75%	55%
The company organizes group commuting to protect the environment	80%	50%
The company’s business is environment-friendly	83%	65%
The company sponsors some pro-environmental activities	83%	50%

Data verifying hypotheses 2 and 4 is to be found in the table 2.

Table 2. Percentage of respondents who will change their decision to apply to the company as a first choice, on the basis of information about the company’s anti-environmental activities

Type of respondent		The company recently committed an environment-related crime			Total
		Strong decrease	Medium decrease	No change	
Anti-capitalist	Environmental involvement	6 (43%)	7	1	14 (100%)
	Uninvolved	17 (61%)	4	7	28 (100%)
Pro-capitalist	Environmental involvement	3 (30%)	5	2	10 (100%)
	Uninvolved	12 (44%)	6	9	27 (100%)
Total		48%	28%	24%	79 (100%)

The above data confirms hypothesis 4: if a company commits an environment-related crime¹⁷ this negatively affects assessments of a company’s attractiveness only slightly more strongly in job seekers who do not have confidence in the credibility of enterprises (anti-capitalists), than in those who have such confidence (pro-capitalists). In the first group, 19% (1+7 out of 14+28) remained neutral to information about the environment-related crime committed by the company, while in the second group, 30% (2+9 out of 10+27) were neutral.

If the above data is analysed from the perspective of the respondents’ declared environmental involvement, both groups have a negative attitude towards applying to a company that has committed an environmental crime. Contrary to hypothesis 2’, this reaction is slightly more frequent in the environmentally involved group (the desire to apply decreased in 88% of environmentally involved persons – 6+7+3+5 out of 14+10 respondents – and in 71% i.e. 21+18 out of 28+27, of those not involved). However, the strength of this reaction conforms

¹⁷ Activities against the natural environment, valued negatively, were operationalized as an environmental crime.

with hypothesis 2', i.e., the desire to apply decreases much more in the group that is not involved in pro-environmental activities (53% i.e. 17+12 out of 28+27, would definitely not apply to such a company), than in the involved group (37% i.e. 6+3 out of 14+10, would definitely not apply).

This data partially confirms hypothesis 2', which states that negative information about a company would lessen the respondents' desire to apply to that company, regardless of the respondents' values (that is, whether the information contains negative content in terms of the respondents' values). Although, contrary to the hypothesis, this information has a negative impact on a larger percentage of environmentally involved persons, it has a stronger (more negative) influence on persons who are not involved.

Lack of trust in capitalism emerges as a factor increasing the number of persons who would definitely not apply to a company that had committed an environmental crime. The results are similar for both the environmentally involved as the uninvolved groups, thus confirming hypothesis 4.

Hypothesis 5 cannot be decisively verified as the sizes of the groups are too small. However the data in the tables above shows that the trends – though statistically insignificant – are consistent with the hypothesis. This suggests that an explanation of Pfieffermann, Wagner and Libkuman's data (2010) concerning the differences between men and women should be sought in their different attitudes to capitalism, rather than in gender.

Summary and conclusions

It is becoming more and more common for enterprises to use branding to promote job openings during recruitment. However, the kind of information that can have the strongest impact on a company's target group is still the subject of scientific debate. To state that every company should inform about its Employee Value Proposition bypasses the issue that communication between Internet users is taking place beyond the company's control.

Two theories that analyse the interaction of information about a company's activities and candidate's values predict different reactions to negative information. Organizational fit theory states that only information directly connected with a candidate's values will have a strong negative impact, while signalling theory considers that all information typically considered negative will have a negative impact.

The aim of this study was to make an initial analysis of the adequacy of applying the explanations of signalling and cultural fit theories to online recruitment. Respondents were placed in a hypothetical e-recruitment situation, in which they had several equally attractive job openings to choose between. The results of the survey showed that positive information about a company's pro-environmental activities, and negative information in the same area, affect a candidate in a manner that is better explained by, respectively, cultural fit theory and signalling theory. Consistently with cultural fit theory (hypothesis 1), it was found that information about the specific activities and the general pro-environmental attitude (contrary to hypothesis 3) of enterprises increases the desire of persons who declare themselves to be pro-environmentally involved to apply to those companies. A better explanation of respondents' reactions to information about a company's having committed an environment-related crime is provided by signalling theory, which states that all candidates, independently

of their values, are less inclined to apply to a given company under the influence of negative information.

This conclusion further refines the knowledge we have of the different effects of negative and positive information in the recruitment situation. Negative information had previously been found to have a much stronger impact than positive information (see the overview of research in Woźniak 2013). Our research suggests that the mechanisms whereby positive and negative information affects recruitment differ: positive information through the control mechanism of cultural fit, while negative information – through signalling.

Because of the limitations of the study, there is a need to conduct more extensive research in this area. The test group was small and the candidates specific (young, relatively well-educated, and at the start of their careers). It could also be argued that answering questions in a survey sets in motion different decision-making mechanisms than is the case when applying for a job, and thus the results of research on a group outside of the recruitment situation are of limited value for generalizing about recruitment itself.

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Managing and preventing workplace bullying: An HR perspective

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Abstract

Bullying has become increasingly prevalent in the workplace. Much research has been done on defining bullying, however, the definitions are unclear across the board. The purpose of this exploratory study is to examine the definition of bullying among HR professionals in the United States and to uncover the process in which HR professionals manage and prevent bullying incidents in their organizations. Semi-structured interviews were conducted with a total of 18 HR professionals and 5 employees from various industries. The findings suggest that HR professionals should focus on training and the role of coping mechanisms in managing workplace bullying, and should further investigate the benefits of offering work-life balance options to their employees.

Introduction

Although not a recent phenomenon, bullying has become increasingly prevalent in the workplace. With the downturn of the economy and the potential for companies to downsize as a result, employees are becoming more stressed at work, partly from the fear of losing their jobs (Roscigno, Lopez & Hodson, 2009). Much research has been done on defining bullying, although the definitions are unclear. The defined acts and inactions that have been described as bullying behaviors are often more subjective than objective, and are not all of equal severity (Einarsen, 1996; Salin, 2001). This causes a discrepancy between employees and their perception of observed bullying behaviors. The purpose of this exploratory study is to survey Human Resource (HR) professionals in the United States to determine the degree of consensus in defining the term “bullying” and to uncover the process in which HR professionals manage and prevent bullying incidents in their organizations. A second objective includes exploring work-life balance as it affects stress and the prevalence of workplace bullying.

Workplace Bullying

Past research has indicated many varying definitions for workplace bullying. Salin (2001) defines bullying as “repeated and persistent negative acts towards one or several individuals, which involve a victim-perpetrator dimension and create a hostile work environment.” Einarsen, Hoel, Zapf and Copper (2003) define bullying as “harassing, offending, socially excluding someone or negatively affecting someone’s work tasks. In order for the label bullying (or mobbing) to be applied to a particular activity, interaction or process it has to occur repeatedly and regularly (e.g. weekly) and over a period of time (e.g., about six months). Bullying is an escalating process in the course of which the person confronted ends up in an inferior position and becomes the target of systematic negative social acts. A conflict cannot be called bullying if the incident is an isolated event or if two parties of approximately equal ‘strength’ are in conflict”. Although the definitions vary, it is important to note that there are three important aspects of any bullying situation: 1) a power imbalance is involved; 2) the incidents occur on a regular basis over an extended period of time; and 3) the actions or inactions of the perpetrator directly cause the victim unwanted psychological stress.

Incivilities that occur and do not meet these three aspects are not considered bullying incivilities.

The negative behaviors that are considered bullying behaviors are just as varied as the definition of bullying itself. These behaviors include verbal aggression, excessive monitoring of work (micromanaging), social isolation, rumors, depriving responsibility, attacking the victim's private life or attitudes, ridiculing a colleague in front of others, and the withholding of necessary information (Einarsen, 1996; Keashly, 1998; O'Moore, Seigne, McGuire & Smith, 1998; Zapf et al., 1996). The three-factor model of workplace aggression as described by Neuman and Baron (1998) divides negative behaviors in the workplace into three categories, starting from least severe and ranging to the most severe: expressions of hostility (e.g., dirty looks, silent treatment, spreading rumors), obstructionism (e.g., intentional work slowdowns, failure to return calls/respond to memos), and overt aggression (e.g., destroying mail or messages needed by the target, failing to protect the target's welfare or safety). With unclear definitions and so many possible bullying behaviors, it is no wonder that organizations have a hard time determining what is acceptable and what is not.

The Multi-level Approach

Heames and Harvey (2006) believe that bullying can be conceptualized on three different levels: (1) Dyadic level - bullied/victim's physical and mental well-being; (2) Group/meso level - relationship norms, and (3) Organizational/macro level – corporate reputation. Heames and Harvey demonstrate that bullying that occurs between a perpetrator and a victim does not only affect the dyad, but also has an effect on the relationships between the perpetrator/other co-workers and the victim/other co-workers. Peers, subordinates, and immediate supervisors are sometimes frightened of the bully or the retribution they may face if they try to intervene. In addition, being exposed to repetitive bullying without any corrective action can lead to an acceptance of the behavior among the group. At the organizational level, bullying has been shown to result in higher absenteeism, higher turnover, and earlier retirement (Salin, 2001), all of which directly contribute to decreasing the organization's profitability and bottom line. The Heames and Harvey model thus proves that bullying in the workplace effects the whole organization, not just the perpetrator and victim who are directly involved.

Organizations must take preventative measures if wish to see a decline in their risk of the occurrence of bullying behaviors. Formal training for managers can provide them with the skills needed to diffuse and respond to aggression in their respective departments. Training in conflict management and communication has proven to be effective in reducing aggression among employees (Neuman and Baron, 1998). Furthermore, since aggressive tendencies often manifest in bullies at an early age, training in personnel screening techniques, pre-employment testing, and behavioral interviewing strategies can greatly enhance a manager's ability to identify aggressive tendencies before employing the candidate (Neuman and Baron, 1998).

In addition, past research demonstrates that offering work-life balance benefits increases job satisfaction, productivity, commitment, and promotes lower stress levels, yet many organizations do not offer these benefits (Kirchoff, 2006; Giancola, 2010; Miller, 2007). In turn, it is possible that the offering of work-life balance benefits may be related to a reduction of bullying behavior. This research study was conducted with HR professionals to explore the definitions of bullying among HR professionals and to uncover the process in which HR professionals manage and prevent bullying incidents in their organizations. Given the

exploratory nature of our study, a qualitative methodology was used. The methodology of this study is discussed below.

Methodology

Participants

Overall, a total of 18 HR professionals and 5 employees from various industries agreed to participate. The professionals worked in the following industries: Publishing/Printing, Healthcare, Law, Business Consulting, Government, Accounting, Travel, Banking, and Education. The five employees worked in either Law or the Travel industry. Thirty-four percent of the participants were male. The average age of participants was 44 years, and they worked in their position an average of 6.71 years.

Procedure

Semi-structured interview questions were developed and a protocol was followed for all interviews. Respondents were asked to define the term “bullying,” give examples of bullying behaviors, discuss what factors lead to bullying, outline how their organization addresses bullying behaviors, and suggest ideas for possible training techniques. While the protocol was used to maintain standardization across all interviews, follow-up questions were asked to uncover emergent themes. Each initial interview (with the exception of one) was recorded and lasted approximately 40-60 minutes. Second interviews were conducted approximately 8 months later, with questions focusing on work-life balance options. At this time, five employees from two industries were asked to participate in the work-life balance options portion of the research in order to gather a different perspective. All interviews were conducted on a one-to-one basis by the same researcher to ensure consistency among the data. Upon completion of the interviews, participants were debriefed and thanked for their participation.

Analysis

Interview recordings were transcribed word-for-word and coded for analysis. After all interviews were transcribed, the transcripts were analyzed for any recurring themes. The results of the interviews are found in the next section.

Results

There were several interesting themes that emerged from the data analysis. HR professionals generally agreed that workplace bullying encompasses behaviors that intimidate, threaten, degrade, harass, or generally make someone feel uncomfortable. These behaviors can be verbal or non-verbal, direct or indirect, and are often seen occurring through electronic means (e.g. email messages). All participants indicated that bullying can lead to violence in the workplace depending on the circumstances.

The HR professionals were consistent with the impact that bullying has on other co-workers and the organization as a whole. They all agreed that bullying situations can decrease morale, decrease communication, and is destructive to the cohesiveness of the division or department. In addition, all HR professionals agreed that bullying behaviors can become “acceptable” workplace behavior if they are not addressed promptly and effectively. These ideas are consistent with the Heames and Harvey model.

All participants stated that their organizations have clear no-tolerance policies for bullying. The no-tolerance policy is discussed with every new hire during orientation and is also printed in the employee handbook.

The participants were divided almost equally in their response to whether or not they have had any training in conflict management. For those who said they did have training, it was in the form of webinars or teleconferences and was optional rather than mandatory.

With regards to work-life balance options, all participants (both HR professionals and employees) agreed that work-life balance means being able to leave work at work when one goes home for the day. Among employees interviewed, all indicated that flextime is a work-life balance option that is most favored among themselves and co-workers. Work-life balance options were appreciated and were perceived to reduce stress levels, possibility leading to the decrease in bullying behavior.

Discussion

The qualitative findings in this study found a few common themes that exist among HR professionals and their opinions and dealings with workplace bullying. These themes shed light on discovering a clear and uniform definition of bullying and behaviors, and to identify beneficial training techniques.

Several limitations were present in the study. First, only eighteen professionals agreed to participate in the study, and many were from the same industry. Further research should include additional participants in a wider range of positions and industries. Second, our initial findings suggested the importance of work-life balance in bullying. Future research should expand on the link between work-life balance and bullying. Finally, quantitative research should be conducted to identify trends that emerged from this exploratory study.

In conclusion, the purpose of this study was to discuss the inconsistencies in the definition of bullying in the workplace and identify a clear, precise definition of bullying behaviors. In addition, this study examined the need for training in preventing and managing workplace bullying among different organizations. The findings suggest that HR professionals should focus on training and the role of coping mechanisms in managing workplace bullying, and should further investigate the benefits of offering work-life balance options to their employees.

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Workers' skills valued by organizations: A comparative analysis based on data from Portugal and Poland

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Abstract

The present paper aims to answer the question: what kind of skills is more valued by organizations in Portugal and Poland? We analyze the issue of workers' skills by using the typology of soft and hard skills. We distinguish moral competencies from soft skills. To collect a set of skills, in 2013 we carried out a short survey with an open question, using convenience samples of working students from both countries. To categorize the answers we employed a process of phenomenological reduction. The results of the study clearly indicate in both samples the preference of soft skills, a secondary interest in hard skills and a marginal demand for moral competencies. However, the results-based conclusion needs more robust acknowledgments and deeper studies.

Introduction

Although Poland and Portugal are situated on two opposite edges of the common economic area, they share many problems such as high unemployment rate, especially among young people. Apart from general economic conditions, the reason for this phenomenon is the fact that professional competencies are not suited to the needs of the labour market. One of the manifestations of the EU common educational policy and labour market is unification of educational systems. This is beneficial considering employees' mobility. On the other hand, each domestic labour market has its own specific conditions, which influence the kinds of professional competencies that are valued there. Domestic economy specialization may be decisive for requirements regarding hard skills. Yet, social and more importantly cultural environment influence the demands regarding soft skills and moral competencies. The aim of the present paper is a comparative analysis of skills valued by organizations in both countries. Its first part briefly presents the notion of 'competencies/skills' and their division into hard and soft skills and moral competencies. Then we present the results of a comparative study conducted in Poland and Portugal regarding competencies required by employers in both countries in each category. The results obtained were analysed in the context of cultural differences between both societies from the point of view of cultural dimensions according to Hofstede, Hofstede & Minkov (2011).

The concept of skills and competencies and their division into soft, hard and moral

The concept of competency was introduced *inter alia* by McClelland, who examined factors of career success. He claimed that career success does not depend on an IQ or school grades but other factors which McClelland called competencies (McClelland, 1973). A significant contribution to the development of the concept of competencies was on the part of Boyatzis, who coined the definition of competency which is still used today (Boyatzis 1982). In his view, 'a competency is an underlying characteristic of the person that leads to or causes effective or superior performance' (p. 21). There are plenty of classifications of competencies. They are grouped for instance in the work of Garcia-Aracil, Mora & Vila (2004). Most of the classifications cover general skills connected with work or a job title (Garcia-Aracil, Mora &

Vila, 2004). A crucial division of competencies is into soft ones and hard ones. In this classification, 'hard skills', 'technical abilities' are the competencies in the field of technology, especially the ones acquired during professional education, academic education or while gaining experience; but they also include administrative procedures connected with a specific line of business of an organization (Katz, 1974/2009; Leroux & Lafleur, 1995; Cabral-Cardoso et al., 2006; Maniscalco, 2010; Rao, 2012). On the other hand, 'soft skills', 'employability skills', 'critical abilities', 'generic skills', 'transferable skills', 'key qualifications', 'transversal skills', 'non-academic skills', 'people skills', are also called general, critical, universal, human, non-academic skills or skills crucial for finding and keeping a job/employment (Lopes et al., 2000; Cabral-Cardoso et al., 2006; Maniscalco, 2010). According to Kim & Kim (2013), moral competencies are different from the others and mean 'the ability to consistently behave according to accepted ethical principles' (p. 155). Moral competencies are 'a bridge between good moral intentions and moral behaviour' (Lind, 2000, p. 404). In this paper, we understand moral competencies as the ones attributed to people who are viewed as honest and virtuous, who show integrity, respect the rights of others, detest favourism and other forms of immoral conduct that are used in order to achieve one's aims. Such skills are denied to those who misuse power, trade in influence, resort to cronyism, use protection, embezzle, etc., whether it serves the purposes of an organization, a professional group or their personal aims, but also irrespective of their proficiency, mastery, or other instrumental skills. This notion is similarly understood by Ossowska (1970/85), Puga & Martinez (2008) and Naughton & Cornwall (2009).

Objective and methodology of research

The purpose of the empirical study was to find the workers' skills that are valued by organizations in Portugal and in Poland. The research consisted of a brief self-administered survey. Respondents anonymously completed the questionnaire, which in addition to demographic questions contained a free-response and open-ended question about employee skills that are valued (demanded) by the organizations in which they work. The respondents had to list them or describe, without being limited as to the type or number of skills. In the second question, we asked respondents to order the skills listed earlier, from more valued/demanded to the relatively less valued/demanded. The study was conducted in Portugal and in Poland in January/February 2013 on convenience samples.

The Portuguese sample (N=105) consisted of working students of undergraduate and master's programmes from two higher education institutions (one public and one private), one of Setúbal (n=78) and another of Lisbon (n=27). After a primary selection, eight questionnaires were eliminated and excluded from further analysis for failure to answer the question on the skills that are demanded by the organization in which he/she works. The final analysis sample consisted of N=97 cases. The Polish sample (N=85) consisted of working students of undergraduate and master's programmes from two higher education institutions (one public and one private), one of Białystok (n=47) and another of Warsaw (n=38).

The responses which listed or described the skills were subjected to a content analysis, namely a thematic categorization (Mayntz, Hubner & Holm, 1985; Bardin, 1991; Romero, 1991), called by some authors a phenomenological analysis or reduction (Marques & McCall, 2005; Marques, 2013). This is a mixed quantitative-qualitative (interpretive) method, as claimed by Bardin (1991), Lessard-Hérbert, Goyette & Boutin (1994) and Marques & McCall (2005) and Marques (2013).

Description and analysis of results

The average age of the Polish and Portuguese respondents is similar, 27 and 35 respectively. The Polish group is dominated by women (68%), while the Portuguese one by men (87%). The average tenure in the organization of the respondents in Portugal (10 years) is 2.5 times longer than those in Poland (4 years). A vast majority of those surveyed in both countries works for private companies, yet in Poland these are small businesses with no more than 50 employees, while in Portugal they are big companies with 251 and more employees. Most of the students in both countries enjoy job security.

When listing the skills valued by organizations, the respondents gave the minimum of 1 and the maximum of 12 names or descriptions of various competencies. In total, in the Polish sample, they indicated 312 basic categories, and in the Portuguese 318. Such a high number of responses and the possibility of formulating the names of competencies on one's own resulted in the necessity to group them. It was achieved with the use of the two-stage method of phenomenological reduction by three independent people/judges for each national sample; however, one judge who has a fluent command of both languages belonged to both groups. In the first stage, independent judges analysed and grouped basic categories of skills listed by the respondents, eliminated repetitions, assigned them to common semantic categories (shared semantic field) with the use of terms which were closer to the literal meaning of competencies named by the respondents. The second stage aimed to finally allocate them to the reduced number of skills. The final categories belonged to the three types, which are the subject of the analysis contained in this paper. The following operational definitions of the competencies were used: *soft skills*: general/universal, transversal, non-academic skills, which are not related to education or any technical function, personality traits, aims, preferences and motivation, career attributes such as the ability to communicate, to participate in a dialogue, to respond and cooperate with others, to work as part of a team, to solve problems and conflicts, to motivate, boost, encourage, support, and facilitate, the ability to adapt, creativity, initiative, good manners, knowledge of the code of conduct; *hard skills*: technical skills acquired through professional and academic education, from experience, or through practising a profession, also administrative procedures related to the line of business of an organization, e.g. operating machines and devices, knowledge of safety rules, computer literacy, knowledge of software, financial/accounting skills; professional and technical experience; *moral competencies*: the ability to consistently behave according to accepted ethical/moral principles, e.g. honesty, transparency, fairness, respect, courage, yet exclusive of the abilities allocated by Ossowska (1970/85) into practical virtues/predispositions or the so-called protestant ethics.

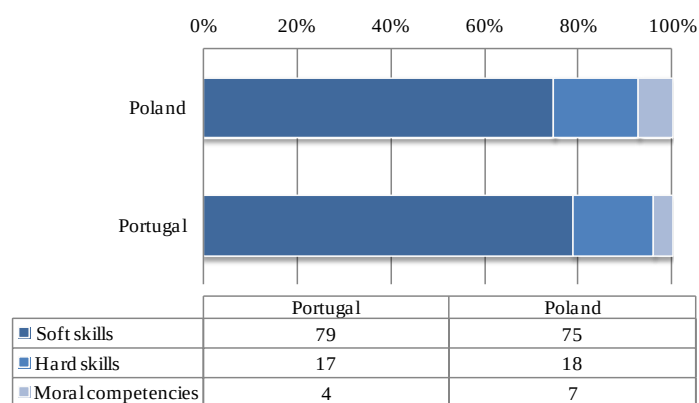


Figure 1. Categories of skills & competencies valued by organizations/employers in the opinion of the Portuguese & Polish employees (%)

In the process of defining the above categories, we identified six respondents' answers which were incomprehensible or unrelated to the notion of competence/skill. They were classified as 'other categories' and were excluded from further analysis.

Among the competencies named in the survey, predominant are soft skills (Figure 1), which account for 75% of the responses in Poland and 79% in Portugal. The second are hard skills, which were indicated by 18% of the Polish respondents and 17% of those from Portugal. Moral competencies were mentioned least frequently, by a mere 7% of the Polish students and 4% of the Portuguese ones.

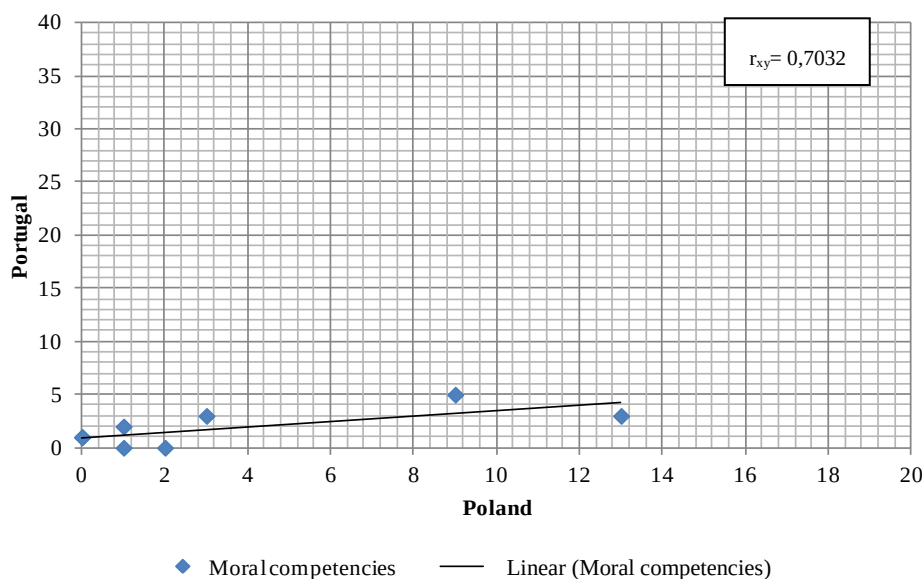


Figure 2. Moral competencies – the relation between the responses in Poland and in Portugal

The analysis of the responses divided into soft and hard skills and moral competencies (including intermediate categories) reveals a certain dispersion of results, yet, not identical within each category. The slightest differences are observed with respect to moral competencies (Figure 2), which results from, among the others, the lowest number of responses in comparison to other categories (44 responses, accounting for 5% of the total). The moral competencies indicated by both the Polish and Portuguese respondents are grouped into the following categories: loyalty, sincerity and trust. Nearly half of the respondents from Poland also pointed to honesty, which was in turn indicated by merely every fifth respondent in Portugal. Such a difference may be a consequence of the size of the organizations where the respondents work. The majority of the students in Poland work for small business, while in Portugal for big companies. In small companies, where people know each other, transparency plays a vital role, which is why there are so many 'honesty' responses. On the other hand, in big organizations employees are more anonymous and although honesty is undoubtedly important there as well, the need to indicate it as a competency valued by an organization is weaker.

The differences between hard skills indicated by the respondents in Poland and in Portugal are also minor and are probably connected with a position or a kind of tasks performed by the respondents rather than country-dependent conditions (Figure 3). The most dramatic dissimilarities were in naming such hard skills as: IT skills, professionalism, formal education

or professional experience. The hard skills that were indicated by the respondents in both countries are: technical knowledge and skills and the command of languages.

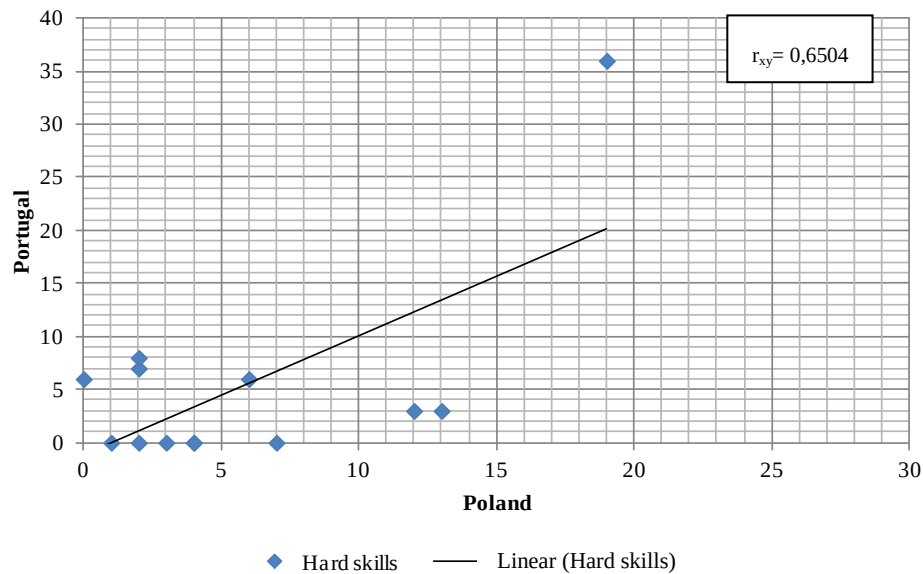


Figure 3. Hard skills – the relation between the responses in Poland and in Portugal

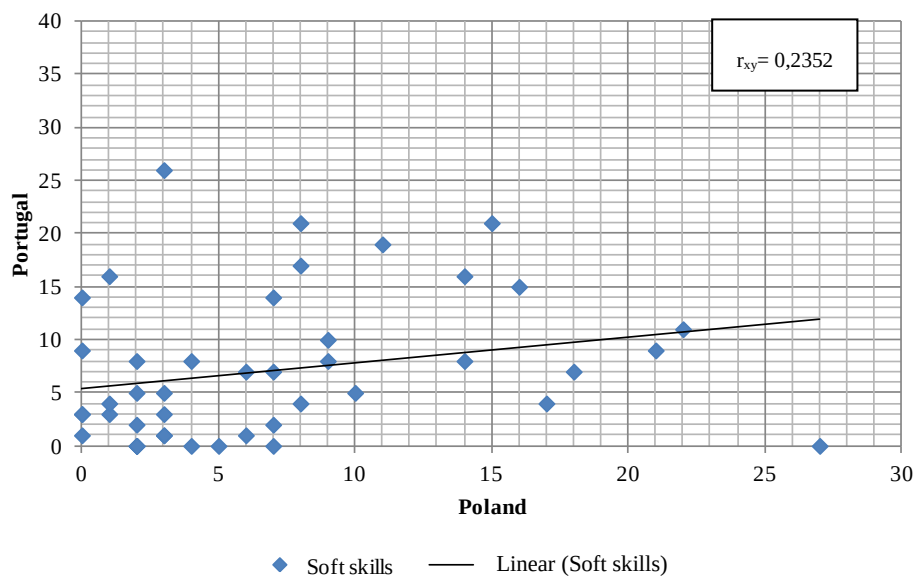


Figure 4. Soft skills – the relation between the responses in Poland and in Portugal

By far widest differences are observable with respect to the soft skills (Figure 4). On one hand, it is a consequence of the most considerable number of responses (312 in Poland and 318 in Portugal). Among the soft skills named by the respondents, the shared ones are: motivation/sacrifice/engagement, punctuality, ability to learn/develop, ability to work as part of a team, positive attitude/assertiveness, timeliness/ability to carry out one's duties and promises, ability to act/make decisions quickly. However, such a noticeable dispersion of responses makes it impossible to carry out a further comparative analysis and draw conclusions. For that purpose, the soft skills were grouped according to the European Skills/Competencies Qualifications and Occupations (ESCO), which define the following competencies: 'language and communication', 'attitude and values at work', 'social skills and

competencies', 'thinking skills and competencies', and 'application of knowledge'. The ESCO is a tool developed within the European Employment Strategy in order to unify skills and competencies for the needs of labour markets. It is accessible at the special European Council portal (ESCO, 2014). The classification was chosen on account of its universality, which will provide comparative data for future research.

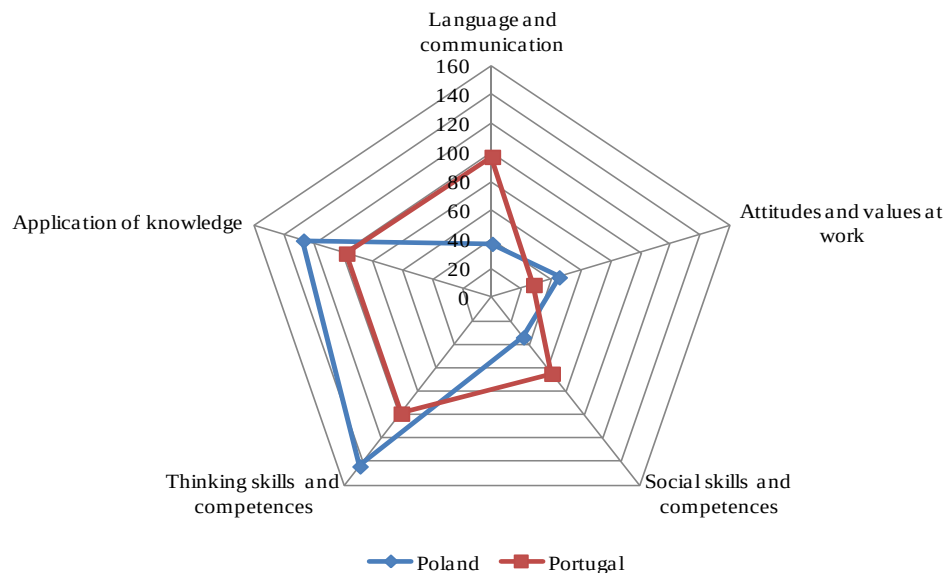


Figure 5. Skills & competencies distribution obtained from the Polish and Portuguese samples according to the ESCO classification

Figure 5 presents the division of soft skills after allocation from both countries. The differences in responses from both countries can stem from the conditions described in the discussion of hard skills above. However, an attempt at explaining them can be made with reference to cultural conditions described by Hofstede, Hofstede & Minkov (2011).

The location of Poland and Portugal was analysed according to the classification of cultural dimensions by Hofstede, Hofstede & Minkov (2011). There are no significant discrepancies between Poland and Portugal with respect to the Power Distance Index (PDI) (Hofstede, Hofstede & Minkov, 2011). From the perspective of this dimension, both countries are situated in the middle of the continuum between the highest PDI and the lowest PDI societies, however, slightly closer to the former ones. The results for the Uncertainty Avoidance Index (UAI) (Hofstede, Hofstede & Minkov, 2011) are also similar. Portugal (together with Greece) ranks first with reference to this index among all the countries analysed by Hofstede, Hofstede & Minkov (2011). Poland is also placed high, in the first ten places. This means that both societies are characterised by a relatively high fear of the unknown. Poland and Portugal hold similar positions considering the Indulgence Versus Restraint (IVR) dimension (Hofstede, Hofstede & Minkov, 2011). Both societies are highly restrictive, the Portuguese one slightly less than the Polish one. Little larger dispersion is observable between Poland and Portugal with respect to Long-term/Short-term Orientation (LTO-WUS) dimension (Hofstede, Hofstede & Minkov, 2011). The Polish society attaches a little more significance to pragmatic features, which are meaningful in the long run; while in Portugal, a little more valued are the features important for the presence. These differences though are not as considerable as is the case with the following two features. Within the Individualism Versus Collectivism (IDV) dimension there are huge differences between the surveyed countries (Hofstede, Hofstede & Minkov, 2011). Regarding this dimension, Portugal is situated closer to the highly collectivist

societies, while Poland is placed a little closer to the middle of the continuum, yet on the side of the individualist societies. Another dimension which differentiates both societies is the Masculinity and Femininity of culture (MAS). The Polish society is more 'masculine', while the Portuguese one more 'feminine' (Hofstede, Hofstede & Minkov, 2011).

As it is presented in Figure 5, the Portuguese respondents indicated more often the competencies from the 'social skills and competencies' and 'language and communication' categories, which are connected with teamwork. This may confirm the collectivism of this society. Greater individualism of the Polish society may be portrayed in the larger number of responses relating to specific competencies including: creativity/entrepreneurship, ability to learn/develop, diligence/efficiency/willingness to make an effort, conscientiousness/thoroughness/meticulousness, and, specifically, autonomy and independence. On the other hand, the collectivism of the Portuguese society may be reflected in more frequent indications to such competencies as: social skills/human relations, availability, flexibility/polyvalence/adaptability as well as cronyism/favoritism/pulling the strings. Yet, it needs to be emphasised that there are responses which seem to defy this thesis.

A noticeable shift towards the masculinity of the Polish culture may be confirmed by more frequent indications to the significance of the competencies which form the category of skills connected with applying knowledge. Among specific competencies, the Poles in the survey more often indicated the features which are rather attributed to 'male' cultures such as: endurance/determination, ability to solve problems, ability to work under pressure/resistance to stress. The 'femininity' of the Portuguese culture may be proven by more common indications to: good manners/politeness, empathy/friendliness/kindness, cooperation/help, physical appearance. This also included examples being exceptions to the rule (more frequently occurring indications to dynamism and leadership in Portugal). However, it needs to be stressed that the Polish respondents indicated to competencies proving the 'masculinity' of culture even though the sample consisted mostly of women (68%). And conversly, the Portuguese respondents reported the 'femininity' of culture although men accounted for 87% of the sample.

Another dimension in the survey was 'Indulgence Versus Restraint'. The Hofstede, Hofstede & Minkov (2011) research showed that the Polish society is more restrictive, while the Portuguese one is more indulgent. This seems to be confirmed by more numerous responses from the Polish respondents which form the 'attitude and values at work' category, as well as more frequent indication to moral competencies, especially honesty and loyalty. It must be admitted though that the analysis of specific social competencies is by no means unequivocal. Greater restraint of the Polish society can be corroborated by recurring indications to the competencies which are absent in the case of the Portuguese responses: regularity as well as conscientiousness/thoroughness/meticulousness. However, the fact that the Portuguese respondents indicated to such competencies as attendance/reliability could be interpreted conversely.

As it has been mentioned above, the surveyed societies are not strikingly different in the 'Uncertainty Avoidance' dimension. The survey fails to give clear results either. The higher 'uncertainty avoidance' among the Portuguese in the survey may be presented in a slightly higher number of indications to such competencies as: organization and management or attendance at work mentioned above. Yet, on the other hand, the Poles in the survey pointed more seldom to flexibility or mobility. It is not insignificant that the majority of the Polish sample consisted of the inhabitants of its Eastern i.e. a more conservative part.

The survey seems to confirm the already-mentioned slight difference between the societies in Poland and in Portugal with respect to the 'Power Distance' dimension. It can be alternatively assumed that the more frequent indications by the Portuguese respondents to managerial skills (organization and management, leadership) prove that the employees in this country are expected to participate more, which is characteristic of lower PDI countries.

Conclusions and limitations of the research

Many papers have been written about competencies and numerous are the results of empirical studies. However, the literature of the subject is still characterized by unequivocality and imprecise terminology. Also, vast is the range of competing typologies. Yet, this diversity does not seem to be a hindrance. Quite to the contrary, it contributes to the development of research on the phenomenon of human competencies viewed from various perspectives.

The supply-demand structure of competencies on labour markets fluctuates and here similarly instead of clear results indicating present or future tendencies we must face phenomena which are not sufficiently researched or thoroughly investigated. And this also creates a welcome opportunity for researchers. As the authors of the latest OECD report on education put it: 'The economies of OECD countries depend upon a sufficient supply of high-level workers. Educational attainment is frequently used as a measure of human capital and the level of an individual's skills. This indicator shows how well the supply of skills matches the demand. For example, high unemployment rates could indicate a mismatch between the educational attainment of the population and labour-markets demands' (OECD, 2013, p. 74).

The fact that the soft skills outnumber the other two surveyed competencies in both sample groups and that they are much more diversified proves their popularity. However, such a significant predominance of soft skills is surprising as 59% of the respondents in the Portuguese sample and 74% in the Polish one did not hold any managerial position; therefore it seems that the technical competencies should be in the lead. On the other hand, we do not know what jobs/tasks the respondents performed for their organizations, and what requires well-developed soft skills are the tasks and functions connected with establishing and cultivating human relations. Unfortunately, this question was not included in the survey. One interesting result is that the responses in both countries concerning soft skills confirmed to a great extent the existence of cultural differences between Poland and Portugal, which were identified in the research conducted by Hofstede, Hofstede & Minkov (2011).

A small number of indications to moral competencies in comparison with the remaining two kinds may prove the lack of interest in these competencies on the part of employers/organizations. But their low number and diversity may also mean that such competencies are regarded as inherent in employees.

The empirical study discussed in this paper was conducted in a non-probabilistic sample of working students, so it is not generalizable to the universe of all organizations in Portugal and in Poland. On the other hand, however, our objective was also a use of data collected in an investigation that had essentially intended to acknowledge the diversity of skills valued by organizations in order to establish a starting point for a more comprehensive and thorough research in the future. The list of competencies collected in this study, using content analysis/phenomenological reduction, will serve the construction of a standardized instrument to be applied in a subsequent research.

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Chapter 8: Religion, Ethics, Morality and Social Responsibility

Values and corporate governance systems

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Abstract

The development of the capitalist socio-economical system depends on its existing corporate governance systems. Values and differences in corporate governance systems across the world are part and partially related. It is obvious that enlightened, competent, professional ultimate owners know what results they want to have from the company in the long run. It's also clear that they can sustain in a competitive environment only if they invest ownership strategy based on values. Therefore, we are crystallising different values, and systems of corporate governance. Success requires a consistent vision, and has an ownership strategy at heart. Ownership strategy is here defined as a series of goal-directed plans and activities that align a business's structure, culture, and resources with the opportunities and threats in its environment.

Introduction

This paper reviews relevant ownership research literature available on values and corporate governance systems. The intention of this paper is to build up a new framework, by focusing fundamental area of several values, and different systems of corporate governance across the world. Corporate governance is a common term in economical and or business languages. While a moderate amount of literature exists on defining corporate governance, but most of the definitions are based on implicit or explicit assumptions about the main objective should be. However, there is no universal agreement how it should be. While a variety of definitions of the term corporate governance have been suggested, this paper will use the definition first suggested by Wahl (2011) who saw, "it is a system concerned with owners' will implementation." In other words, it could be perceived as an ownership strategy by which owners use to control corporations and assure themselves of getting a competitive rate of return on their investment.

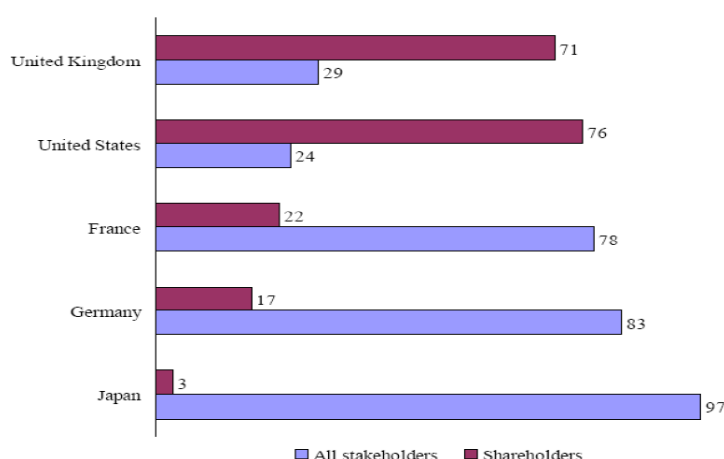


Figure 4. Whose Company is it? (Source: Yoshimori, 1995)

In addition, Shleifer and Vishny (1997) defined corporate governance as "the ways in which suppliers of finance assure themselves of getting a return on their investment." In contrast, Goergen (2012) definition allows for differences across countries in terms of the main

objective of the firm: “A corporate governance system is the combination of mechanisms which ensure that the management ... runs the firm for the benefit of one or several stakeholders ... Such stakeholders may cover shareholders, creditors, suppliers, clients, employees and other parties with whom the firm conducts its business.” Furthermore, the Figure 1 clearly shows that there has been, and is a conflict or difference in systems of corporate governance around the world.

Under the above circumstances the motive of the authors is to focus on the phenomena of several values and different systems of corporate governance by believing new & holistic approach to corporate governance called “New Corporate Governance”, which is based on reversed KISS principle: keep it Situational, Strategic, Integrated and Controlled, adding simultaneous value to shareholders, customers, employees and society (Hilb, 2006).

Positioning the Review in Relation to Existing Ownership Research

Research Methodology

Research philosophies tell us about the philosophic assumptions the author has about the world, the nature of knowledge and knowing, the role of values, and how to go about studying the phenomena. Current work is based on constructionism, interpretive ontological assumptions are that the world is complex and dynamic and is constructed, interpreted and experienced by people in their interactions with each other and with wider social systems. Reality is constructed by people based on beliefs, feelings and experiences; multiple local and specific “constructed” realities exist (Hine & Carson, 2007). An interpretive epistemological assumption is that knowledge is based not only on observable phenomena, but also on subjective beliefs, values, reasons, and understandings. Values are an integral part of social life – no values are wrong, only different (Hine & Carson, 2007). Interpretive research focuses on the full complexity of human sense making as the situation emerges (Kaplan & Maxwell, 1994).

Techniques and procedures are miscellaneous material or data collection and analysis methods. Although a clear distinction between data gathering and data analysis is commonly made in quantitative research, such a distinction is problematic for many qualitative researchers. The data type constrains the presentation, summary and analysis techniques that can be used. The basic information search techniques and procedures were to search through all relevant information sources by relevant key words. It seems that all research on corporate governance is actually related to ownership research. The topic is interdisciplinary; a wide selection of literature was found under different disciplines.

Values in Corporate Governance Systems

Zetterberg (1997) straighten out that the market researcher had contributed management by interpreting many market signals. Among many of those, they had empirically found that, the ultimate driving force of the market may well be the values held by the population. A genuine, market is the one of the system through which, we can realize our values. Consequence, it would be wiser to incorporate market research in value research to demystify values.

Before that, firstly, we must set up a distinguish idea between norms & values. This is properly not done in previous social science value based research. There is long known a great deal about the compliance to norms. We know less about the actualization of values. Norms is a generalised perspective statements, attach them to a position. It could homeowner,

owner of a firm or any sort of role. Whereas, value is generalised evaluative statements, refer to the ways in which we want evolve & grow (Zetterberg, 1997). Zetterberg (1997) considered wealth, order, truth, the sacred, virtue, and beauty are as “Cardinal Values”. All are products of society. The cardinal values are embedded in the major institutional realms, i.e., the economy, polity, science, religion, ethics, and the arts. The economy seeks and produces wealth, the polity order, science truth, religion sacred meanings, ethics virtue, and art beauty. We can learn about the cardinal values by studying economic, political, and juridical history, the history of ideas and learning, the history of religion, of customs, and of art. Most value research is embodied in the humanities, not in anthropology or sociology. Now under the above mentioned concepts and given example one distinguish of values can be made which is “Societal Value”.

Furthermore, the theory of Schwartz’s Basic Human Values (2012) values which are used to characterize cultural groups, societies, and individuals, to trace change over time, and to explain the motivational bases of attitudes and behaviour. He also invent to following Figure 2 to make a conclusion that basic values that people in all cultures recognize. It identifies ten motivationally distinct types of values and specifies the dynamic relations among them. Some values conflict with one another (e.g., benevolence and power) whereas others are compatible (e.g., conformity and security). The “structure” of values refers to these relations of conflict and congruence among values. Values are structured in similar ways across culturally diverse groups. This suggests that there is a universal organization of human motivations. Although the nature of values and their structure may be universal, individuals and groups differ substantially in the relative importance they attribute to the values. That is, individuals and groups have different value “priorities” or “hierarchies.” So, another one distinguishes of values can be made which is “Personal Value”.

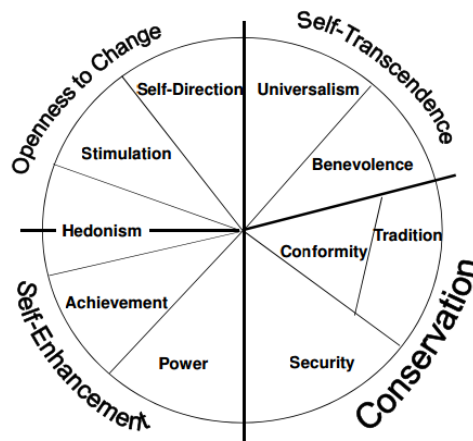


Figure 5. Theoretical model of relations among ten motivational types of value (Source: Schwartz, 2012)

Wahl’s (2011, 2012) ownership typology represents a key stone in the understanding of the interests and the behaviour of stakeholders in capitalist socio-economic systems. In its widest meaning, ownership is a relationship between the subject (the owner) and the object (the owned target). It is not just a legal-economic construct; it has also personal, social, political, and economic value dimensions.

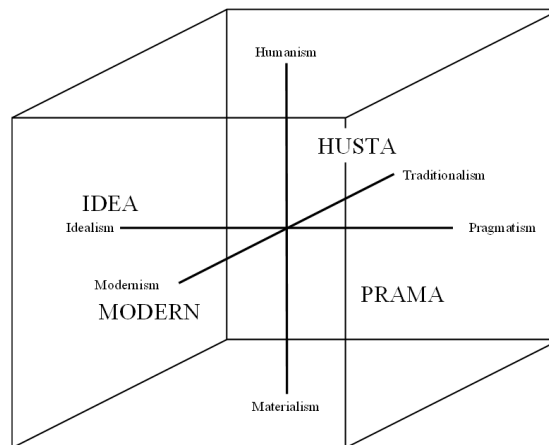


Figure 3. Wahl's Ownership Typology: Ideal Types of Owners in a Three-Dimensional A-Space (Source: Wahl, 2011)

The Ownership Typology (Figure 3) contains four ideal types of owners (explanatory hypotheses): 1. Humanist-Traditional ownership type (HUSTA); 2. Modern ownership type (MODERN); 3. Pragmatist-Materialist ownership type (PRAMA), and 4. Idealist ownership type (IDEA).

The ideal types are placed in a three-dimensional A-space. Axis x: idealism – pragmatism; y: humanism – materialism; z: modernism – traditionalism. The first dimension spans the field from idealism, where “one dramatizes one’s values” to pragmatism and instrumentality, where “one compromises one’s values” (Zetterberg, 1997). The second dimension separates a concern with human beings from a concern with material things, thus bridging the poles of humanism and materialism. The third dimension of the A-space runs from becoming to being. It corresponds to a scale from modernism, where one welcomes change: “becoming”; to traditionalism, where one upholds stability: “being” (Zetterberg, 1997).

The Humanist-Traditional ownership type (HUSTA) carries the motivationally distinct basic value (value type) benevolence; the main characteristics for benevolence are preservation and enhancement of the welfare of people with whom one is in frequent personal contact. Owners’ basic human values – single value items: helpful, honest, forgiving, loyal, responsible, true friendship, a spiritual life, mature love, meaning in life. Here the Schwartz’s (1992) theory of basic human values was used as the theoretical basis. What the owners of the company want to have from the company in the long run is seen as objectives and results of achieving the objectives (personal, social, political, and economic values). The ways the values are created and how the owners’ will is achieved is seen as instrumental tools for the achievement of the objectives (time, risk, and process). The company owner wants to have power by giving bonuses; it refers to positive reinforcement and the ability to award something of value. The owner’s contribution to the realisation of the business idea is strategic and financial. For him return is more important than power; specifically – economic goal, current benefit, dividends. The owner agrees to found a company with a participatory rate of 100% (majority), and take high risk for the achievement of objectives. Goergen (2012) argues that a large shareholder overcomes the free-rider problem and the lack of monitoring. The large shareholder may also expropriate the minority shareholders. Concentrated ownership is suited for activities requiring active monitoring.

The Modern Ownership Type (MODERN) carries the motivationally distinct basic values (value type), such as: hedonism, stimulation, and self-direction. The main characteristics for

hedonism are pleasure and sensuous gratification for oneself – single value items: pleasure, enjoying life, self-indulgent. The main characteristics for stimulation are excitement, novelty, and challenge in life – single value items: daring, a varied life, an exciting life. The main characteristics for self-direction are independent thought and action-choosing, creating, exploring – single value items: creativity, curiosity, freedom, choosing own goals, independent, private life. The company owner wants to have return and power through owner's legitimacy and punishments; punishment is predicated on the fear of losing status, position, bonuses or job. Equally important to owners' economic goals are current benefit, dividends and increasing capital, increasing stock price. The company's market value is very high. The risk spreading owner agrees to take medium high risk for the fast achievement of objectives (short range owners' investment horizon). Owners are working in the company or used to work in the company they own (insiders). Consensus is important.

The Pragmatist-Materialist Ownership Type (PRAMA) carries the motivationally distinct basic values (value type), such as: conformity, security, power, and achievement. The main characteristics for conformity are restraint of actions, inclinations, and impulses likely to upset or harm others and violate social expectations or norms – single value items: politeness, honouring parents and elders, obedient, self-discipline. The main characteristics for security are safety, harmony and stability of society, of relationships, and of oneself – single value items: clean, national security, social order, family security, reciprocation of favours, healthy, sense of belonging. The main characteristics of power are social status and prestige, control or dominance over people and resources – single value items: social power, authority, wealth, preserving my public image, social recognition. The main characteristics for achievement are personal success through demonstrating competence according to social standards – single value items: successful, capable, ambitious, influential, intelligent, self-respect. The company owner wants to have power through personal authority, in a company that rewards stakeholders and has a role in society. For the achievement of objectives the owner agrees to take low risk. Owner's participatory rate is 10 to 50% (minority). They are relatively professional ultimate owners, make compromises, and have an active role in governance and management. An active owner is interested in his property, and might have some emotional connection to it.

The Idealist Ownership Type (IDEA) carries the motivationally distinct basic values (value type) – universalism and tradition. The main characteristics for universalism are understanding, appreciation, tolerance and protection for the welfare of all people and for nature – single value items: protecting the environment, a world of beauty, unity with nature, broad-minded, social justice, wisdom, equality, a world at peace, inner harmony. The main characteristics for tradition are respect, commitment and acceptance of the customs and ideas that traditional culture or religion provides for the self – single value items: devout, accepting portion in life, humble, moderate, respect for tradition. The company owner wants to have power through identification, which refers to the ability to influence others through charisma, personality, and charm. For him the owners are the key stakeholders. Capital is raised ethically, through quality and contributing in strategy. For the achievement of objectives owner agrees to take low risk. Owner's participatory rate, in a high turnover company, is more than 50% (majority). The investment horizon is long range, which means an investment for more than one year. He enters into a coalition agreement, and is ready to work as a management board member (insider) in the company owned by him.

The first attempts to arrive at taxonomies consisted of finding commonalities as well as differences across countries in terms of corporate governance. More recent attempts have

been based on theoretical foundations, generating predictions as to how institutional arrangements come about, and how existing institutional arrangements explain differences in corporate governance and corporate or economic performance. (Goergen, 2012)

It is important to be aware of differences between control and ownership as they determine the types of conflicts of interests that a company and its stakeholders may be subject to. In its widest meaning is ownership a relationship between the subject (the owner) and the object (the owned target). Ownership is defined as ownership of cash flow rights. Cash flow rights give the holder a pro rata right to the firm's assets and earnings. Control is defined as ownership of control rights. The combination of ownership and control determines the main potential conflict of interests. (Goergen, 2012)

Corporate control and ownership in the UK and USA differ markedly from corporate control and ownership in the rest of the world. Whereas in the UK and the USA most stock-exchange listed companies are widely held, in the rest of the world control tends to be concentrated in the hands of one shareholder or a small number of shareholders. In addition, to the differences in the concentration of control, there are also differences in terms of the types of shareholders that prevail in each group of countries. (Goergen, 2012)

So, a more neutral reasons behind the different systems of corporate governance is, its deals with conflicts of interests between: the providers of finance and the managers; the shareholders and the stakeholders; different types of shareholders (mainly the large shareholder and the minority shareholders) and the prevention or mitigation of these conflicts of interests. (Goergen, 2012)

Now the authors of this paper would like to represent by believing corporate governance by believing new & holistic approach to corporate governance called "New Corporate Governance", which is based on reversed KISS principle: keep it Situational, Strategic, Integrated and Controlled, adding simultaneous value to shareholders, customers, employees and society (Hilb, 2006).

Licht, Goldschmidt and Schwartz (2005) argued that theorists, policy-makers, and practitioners share the intuition that corporate governance reflects national culture. Until recently, however, commentators treated culture either anecdotally or as a black box. The challenge for economic analysis is to operationalize culture in ways that permit developing and investigating testable hypotheses. Now, definitions of culture abound. In order to distinguish culture from structural aspects of society that might influence corporate governance, we define culture in subjective terms. Many different value emphases could be chosen to characterize cultures.

A careful exploration of the concept of values, uncovers differences indicating that organizational values adopt a number of forms. Bourne and Jenkins (2013) make the case that there are four distinct forms of organizational values – espoused, attributed, shared and aspirational. These partial, but related, forms encompass variation in temporal orientation and levels of analysis. They use these forms to reveal the dynamic nature of organizational values by delineating the evolution of gaps and overlaps between them. They set out a series of propositions, originating from institutional, organizational and managerial sources to explain the nature of movement between these distinct forms of values and the potential implications for organizational behaviour and performance.

Conclusions and Recommendations

In conclusion it can be stated that the development of the capitalist socio-economical system depends on its existing corporate governance systems. Values and differences in corporate governance systems across the world are part and partially related. It is obvious that enlightened ultimate owners know what results they want to have from the company in the long run – diverse personal, social, political, and economic values. It's also clear that they succeed in a dynamic environment only if they invest those same values. Consequently, it needs to know what the ownership values are for a successful company under different corporate governance systems. The main implication of the current research is better understanding of the research problem. Corporate governance has become a major topic in the world of business, politics, and academia, in Estonia and throughout the world. It has important implications not only for business, but for the wider economy and society.

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Adam Smith and the Ethics of Corporate Social Responsibility

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Abstract

Corporations have adopted various approaches to Corporate Social Responsibility (CSR), whether motivated by corporate or functional strategies or by pure altruism. In this paper, we probe the ethics of contemporary CSR initiatives using an approach inspired by Adam Smith's concept of the impartial spectator to developing an ethical framework for CSR. Our conclusions suggest that the ethical dimension of CSR decisions have been under-emphasized. In the face of conflicting CSR and business ethics theories, managers continue to face difficulties in consistently arriving at ethical decisions. Unless approached from an ethical perspective, CSR will not achieve desired social results.

Introduction

Since the beginning of capitalism, the corporate self-interest that guides our economies has experienced periodic episodes of unrestrained greed. A recent solution to this ethical problem has been CSR, a concept that, despite the abundance of literature, lacks a clear consensus definition (Carroll & Buchholtz, 2003). A variety of theories and models have been proposed including stakeholder theory (Freeman, 1984), shareholder theory (Friedman, 2002), and Carroll's pyramid of CSR (Carroll & Buchholtz, 2003). Most public corporations today have adopted some form of CSR with manager motivations including marketing, branding, increasing barriers to entry, competitive advantage, decreasing costs, and altruism. However, many of the specific intentions and actions of managers could be deemed unethical. Several authors have analyzed CSR in general from an ethical perspective (Masaka, 2008); however little research has been completed in evaluating specific CSR initiatives, motivations, and strategies through this particular lens (Brown & Forster, 2012). This paper will evaluate CSR and its various intentions and initiatives from an ethical perspective. Social responsibility has been widely adopted recently by corporations however it cannot succeed unless these decisions are made from an ethical foundation. Moral philosopher Adam Smith is best recognized for his work *An Inquiry into the Nature and Causes of the Wealth of Nations* (1993) that provided a theory of our economic system. This paper will return to Smith for the solution to our current crisis of values by reviewing his ethical treatise the *Theory of Moral Sentiments*. Building on Smith's concept of the "impartial spectator" we develop an ethical model to evaluate specific CSR initiatives. Following an overview of the history and debate surrounding CSR, we review the conflicting theories of modern business ethics, discuss Adam Smith's concept of the impartial spectator, devise an ethical model managers can use to evaluate CSR decisions, and apply this model to three historical CSR decisions. We conclude that while the ethics of CSR in general are still being debated, managers require a method for evaluating the ethics of specific CSR initiatives.

The CSR Debate

Corporate Social Responsibility (CSR) can be traced back as far as the early 1950s when Bowman (1953) argued that corporations owed a responsibility to the communities in which they operated. This view was initially criticized with the argument that focusing on social issues should be the responsibility of government and that it distracted managers from the

profit objective required for success and sustainability (Carroll & Shabana, 2010). This argument essentially echoes Friedman's (2002) position that the only responsibility of business is to increase profits; corporate support for social causes was in essence imposing taxes on shareholders, employees, and customers (James & Rassekh, 2000). Other critics have argued that CSR and stakeholder theory is unrealistic (Carson, 2003), increases decision making complexity (Sundaram & Inkpen, 2004), reduces manager accountability (Donaldson & Preston, 1995), decreases economic efficiency (Sundaram & Inkpen, 2004), and ultimately is a form of socialism (Kaler, 2003).

For classical proponents of shareholder theory (Friedman, 2002) and its singular focus on profit maximization (Sundaram & Inkpen, 2004), CSR appears to be unethical. Countering this view are three key arguments: shareholders are but one category of stakeholder with a simple economic interest rather than ownership privileges (Stout, 2007); short-termism (Smith 1993) rewards executives for the wrong reasons and promotes unethical behavior (Carson, 2003); when managers are guided solely by the profit motive they cannot make rational socially responsible decisions (Drucker, 2001).

While, the business case for CSR often included ethical correctness (Drucker, 2001); cost minimization (Brown & Forster, 2012), brand value (Garriga & Mele, 2004), and long-term corporate profitability (Carroll & Buchholtz, 2003), stakeholder theory countered the critics of CSR by embracing profits and balancing the needs of all stakeholders. This perspective results in two managerial obligations: to recognize the rights of the stakeholders and to balance their interests. Both sides of the CSR debate have proposed a moral argument to support their case however neither side has offered a method for evaluating the ethics of specific CSR initiatives.

Business Ethics Approaches

The literature reveals three dominant approaches to contemporary business ethics. The virtue approach considers ethics from an internal perspective, focusing on the importance of motivations and intentions, not just actions and consequences, when evaluating behavior. Virtues are ideal character traits such as honesty, temperance, trustworthiness, and are formed by habit. A major limitation of this approach is that developing a manager's character and integrity is a difficult task and takes time. The Kantian approach, with its basis in reason (Abela, 2001) argues that an action is ethical when it is our duty and if we would want the action performed universally (Kant, 2010). The major limitation of Kantianism is that it does help managers to decide between more than one ethical action (Hoffman & Moore, 1990). The utilitarianism approach considers actions ethical if they produce the greatest good for the greatest number of people, i.e., if it increased the overall happiness in society (Mill, 2007). The major critique of the theory is the emphasis on outcomes without adequate consideration to the moral intentions of the agent (Hoffman & Moore, 1990). Combined with justice, ethics acts as a mechanism to constrain greed. Unfortunately none of the approaches discussed are ideal for use by managers on their own since all have their respective limitations. In addition, to assess decisions from the manager's perspective applying any of these three approaches could result in a biased decision. To develop a solution to minimize this limitation, this paper will consider Adam Smith's perspectives on business and ethics as a basis for developing an approach with greater functionality for managers.

Adam Smith and the Impartial Spectator

Smith (1993) sought to determine how society functioned under the emerging market system of the time, recognizing its tendency toward social harmony, while he voiced suspicions of business motives along with skepticism of those who claimed to “do good” for society. He argued that the best good for society would be achieved through efficient markets, (Smith, 1993).

Against this backdrop, Smith (2006) viewed the source of morals as sentiments rather than reason, developing his theory from normal moral judgment based on three categories of cardinal virtues: prudence, justice & benevolence, and self-control (Raphael, 2007). Society’s survival, according depended on justice, while its harmony depended on benevolence. It was justice that drove us to “do no harm”, while benevolence motivated us to “do good” (Bragues, 2009). At the heart of Smith’s theory was the principle of sympathy. Smith (2006) believed that to sympathize with an action or motivation was to approve of it, and if we could not sympathize with it, it was to disapprove. Like justice, sympathy helped moderate the self-interest that drove human nature, i.e., our moral “invisible hand”. These beliefs gave rise to the impartial spectator, Smith’s term integrating “our ability to put ourselves in the position of a third person, an impartial observer, and in this way form a sympathetic notion of the objective (as opposed to the selfish) merits of the case” (Heilbroner, 1986, p.47) and our capacity to distinguish right from wrong (James, 2004), through the principle of sympathy. Sympathy represented approval and was the motive for all ethical actions (Raphael, 2007). As the counter-weight to self-interest, the impartial spectator created a level playing field in business in Smith’s time (Raphael, 2007) and does so today as a practical, socially relevant and normative mechanism for arriving at ethical decisions (Szmigin & Rutherford, 2013). Limitations of the impartial spectator approach include: biases stemming from its social roots (Raphael, 2007); the overwhelming power of personal self-interest (Herbrener, 1987); imperfections in the principle of sympathy (Smith, 2006). The model this paper proposes builds on Smith’s concept of the impartial spectator and addresses its limitations.

The Impartial Spectator Approach

This paper proposes an *Impartial Spectator Approach* to business ethics which integrates the three ethical approaches with Smith’s concept of the impartial spectator. We argue that utilizing all three approaches minimizes their individual limitations. The impartial spectator approach is intended as a tool for managers to assess whether CSR initiatives are ethical.

Figure 1: Impartial Spectator Approach

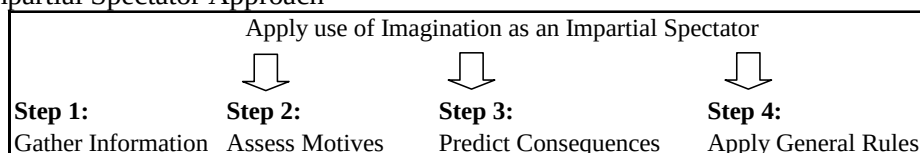


Figure 1 illustrates the impartial spectator approach. The first step requires the decision-maker to gather, for the impartial spectator’s consideration, as much relevant, accurate and unbiased information as possible regarding intentions, actions required, and probable consequences of the initiatives, including how all stakeholders would be affected. The impartial spectator must be well informed (Smith, 2006). At step two, the virtues approach to ethics guides consideration of the decision-maker’s motivations for CSR initiatives through the impartial

spectator's lens. The impartial spectator must critically assess and challenge every motivation. Only honest reflection can ensure intentions are in good faith and would be approved of. In the third step, attention shifts to the impartial spectator's sympathy for those affected by the decision maker. The impartial spectator must consider the likelihood of harm or violations of rights taking a utilitarianism perspective. At the final step, the impartial spectator considers whether the general rules of society were violated by the decision or action. Applying Kant's "categorical imperative" the impartial spectator would consider the desirability of a world where the action was universal.

If after working through the four steps of the *Impartial Spectator Approach* the decision-maker imagines that an impartial spectator would not approve of their initiative, the action must be considered unethical. While this model minimizes the limitations of virtue, Kantian and utilitarian ethics used separately, it is still constrained by the possibility that managers may purposely ignore certain pieces of pertinent information (Guth & MacMillan, 1986) or allow bias to influence their decision (Kahneman, Lovalklo & Sibony, 2011). While these limitations can never be completely eliminated, this approach offers an improvement over the three main existing approaches to business ethics. When managers consider their own motivations, these motivations can be determined through introspection; managers contemplate the reactions of an impartial spectator. As outside observers contemplating the ethics of CSR initiatives, we place ourselves in the role of impartial spectator.

Applying the Impartial Spectator Approach

Most CSR initiatives can be classified as either "do less harm", altruistic (do more good), or strategic. A major driver of "do less harm" CSR has been pressure on companies to reduce, and/or eliminate, the negative externalities they create such as environmental damage, fraud, and monopolistic practices. Drucker (2001) argued that failing to think through and work for an appropriate solution to such externalities violates the "do no harm" principle. However, attempting to eliminate externalities where no legal requirement to do so exists, could violate the rights of some stakeholder groups. Managers may engage in altruistic CSR initiatives to make up for the previous harm they have caused, react to activist pressures, or they may firmly believe they have a responsibility to society. While altruistic CSR may appear to be better for society as a whole, it may not always be ethical. A company that donates money to non-stakeholders, while at the same time freezing employee wages or reducing shareholder dividends, is not acting ethically. While a small amount may be considered ethical for goodwill purposes, an excessive amount of altruistic CSR spending would not be. In addition, any amount spent on altruistic activities while other stakeholders' needs are not being met, would also be considered unethical. Strategic CSR is based on the principle of human self-interest, aligning the corporate purpose of profits with social responsibility. Companies choose to implement strategic CSR initiatives as a competitive advantage (Porter & Kramer, 2011), for uncovering the "Fortune at the Bottom of the Pyramid" (Prahalad & Hart, 2002), and in order to profit from "social innovation" (Drucker, 2001). While strategic CSR appears to offer a solution to the ongoing debate, there is little empirical evidence supporting it. Wulfson (2001) argued that "the long-term consequences of an action must be weighed when reaching a moral decision" and that "corporations must decide if the long-term gains will justify making a contribution to a nonprofit cause" (p.136).

Case Study "Do Less Harm" CSR. In 1994 Interface CEO Ray C. Anderson decided to alter his corporate strategy (Anderson, 2011). His intention to do less harm, was to eliminate the negative externalities his company created, most of the company's products were oil based,

while maintaining his corporate financial goals. Assuming Anderson was able to achieve this goal his initiatives were unlikely to impact any stakeholder negatively, resulting in a positive net utility for society. If we apply Kant's categorical imperative to the decision, we ask whether we would want to live in a world where all companies implemented the same environmental initiatives, would our impartial spectator want to live in this society. An impartial spectator would approve of the decision if it were universal as it reduces harms caused by the company while at the same time not violating any stakeholder rights. Overall Anderson's CSR decision would have been considered ethical as an impartial spectator would have approved of the motivations, actions, and probable consequences of the initiative.

Case Study Altruistic CSR. Following the death of their founder Sam Walton in 1992, Wal-Mart altered their view of altruistic CSR, becoming one of North America's leading corporate donors with roughly 1.5% of income going to charitable causes, most notably to help eliminate hunger. However the company has faced criticism and lawsuits for discrimination, low wages, poor working conditions, and anti-competitive actions. Shareholders, customers, employees, and the local community were indirectly affected as these funds were not used to increase the stock price for shareholders, lower prices for customers, increase compensation for employees, or to invest in the local communities. Duke's motivation is clear. In his introduction to Wal-Mart's *2011 Global Responsibility Report* he admits that his initiative is a result of a genuine desire for sustainability and to be socially responsible. The decision to allocate funds to help eliminate hunger would appear to have increased the overall happiness of society. Food and cash donated to help those who are hungry would be considered a matter of life or death and would have a substantially higher utility than for almost any other alternative use of the money. However, the company would have chosen a non-stakeholder over its many different stakeholders. Finally, using Kant's categorical imperative, we ask if all companies donated 1.5% of their profits to charitable causes would we want to live in this world. This would appear to be a world we would all want to live in however this world would be one where the legal rights of shareholders and moral rights of employees and suppliers would not be respected. While Wal-Mart's actions appear to have been in good faith and had an overall positive utility on society, an impartial spectator would consider funds being used on non-stakeholders before the legal and ethical rights of the company's stakeholders had been addressed as unethical.

Case Study: Strategic CSR. Starbucks CEO Howard Shultz strongly believed not only in the ethics of treating employees fairly, but in the profitability of doing so (Shultz & Lang, 1997). In the late 1980s he expanded health-care coverage to include part-time workers and argued that not only was it the right thing to do, it would reduce turnover, reduce recruiting and training costs, and increase customer loyalty, as higher turnover also weakens customers' connections. Both employees and shareholders would be affected by the decision as the cost of the benefits would impact both the short-term and long-term profitability of the company. Schultz' motivation for this initiative was both ethically and financially based. His decision was made in good faith, an effort to increase both the quality of life of his employees and the profitability of the shareholders. Next, the decision would not have violated shareholder's legal rights, nor would it have violated the ethical rights of other stakeholder. The initiative would also likely increase the happiness of society as employees would be have better off, customers would likely have received better service, and shareholders would in the long-term likely have received higher returns. Finally, applying Kant's categorical imperative to the decision, we imagine whether we would have approved of the decision if it were universal. An impartial spectator would consider a world where all companies offered benefits to part-time employees, and this resulted in stronger brands, stronger levels of customer service and

increased wealth for shareholders one in which we would want to live in. Shultz would have come to the conclusion that an impartial spectator would have approved of the decision as the motives would have been ethical, the probable consequences would have caused no harm and violated no rights, the general rules of society would not have been violated, and ultimately would have increased its overall happiness.

Overall strategic CSR is almost always ethical as the decision-maker is attempting to align the legal rights of shareholders with the ethical rights of other stakeholders. Do less harm CSR will also for the most part be deemed ethical, unless the action places the company at a competitive disadvantage. In this case, Ducker (2001) recommended the decision-maker instead lobby government for a change in legislation to ensure a level playing field. While an impartial spectator would sympathize with most strategic and do less harm initiatives, altruistic CSR is more complex and requires extra consideration since these initiatives involve non-stakeholders. Any altruistic CSR directed towards non-stakeholders would likely be considered unethical if coming before the rights of corporate stakeholders have been addressed. In the case discussed, Wal-Mart's altruistic CSR initiatives would be considered unethical as the company had not addressed the ethical and legal rights of stakeholders first.

Conclusions

Corporate social responsibility has been society's solution to the crisis of values that has developed in modern business. However CSR is an externally motivated response, one that may not always be ethical. What is required instead is internally motivated action based on moral values. We can no longer trust that managers will simultaneously pursue the profit motive and do what is right. We therefore need a structural mechanism in place to guide managers consciously since they no longer are doing so subconsciously. We have proposed expanding on Adam Smith's impartial spectator, and have developed an Impartial Spectator Approach. This approach allows managers to analyze not only CSR decisions, but all decisions from an ethical perspective. As there is no agreed upon theory of ethics, the Impartial Spectator Approach integrates the most prevalent ones and considers the ethics of the manager's motivations, actions and the probable consequences. It provides a practical tool that requires a manager's habitual practice. The Impartial Spectator Approach also offers fewer limitations than other ethical management decision making models, in particular for questions surrounding CSR initiatives. The main limitation of analyzing cases from the perspective of a third party is that motivations are based on available information and only the decision-maker knows their true intentions. Future research could involve the assessment of CSR motivations through the acquisition of primary information from the decision-maker. In the *Wealth of Nations*, Smith (1993) provided a theory of our economic system however he also offered a solution to the current crisis of values in his *Theory of Moral Sentiments*. While we can only speculate what Smith would have opined on the modern corporation, he likely would have had severe ethical concerns for both it and for the current CSR movement.

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Do religious paradigms exist in the workplace?

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Abstract

The purpose of this study was to compare the attitudes, job ranks, and salaries of religious, traditional, and secular employees.

Subjects were 2,576 employees that were employed by 11 business organizations.

The study found that the some traditional stereotypes of gender roles in work place still prevail, especially among religious men and women. Moreover, the findings reveal that religion influences work norms and some work attitudes, mainly on women. Surprisingly, the traditional women have significant differences in attitudes toward work compared to religious or secular women. Religious and traditional employees have lower job ranks and lower salaries as compared to secular ones.

Introduction

Religion and work

An important trend in business in the twenty-first century is a focus on employee spirituality and religion in the workplace. Work and religion and their interrelationship are part of the foundation of the human society. The work ethics is a focus of the Old Testament and the New (Richardson, 1952). Work plays a fundamental role in the life of the individual who makes an absolute commitment to it in terms of time. Work has notable social and economic consequences in organizations and society (Harpaz, 1998). For most people, the meaning of work has generally been expounded by three propositions (Harpaz, 1990a), of which the most prominent is economic or instrumental, the second concerns commitment to work as part of human nature and human needs, and the third is socio-psychological.

Similar to work, religion plays an important role, having had an impact on world events for millennia (present day examples include the Middle East, Iran, and Northern Ireland) and on individual perceptions and attitudes. In various nations, religion is a pivotal institution of culture; consciously or unconsciously, religious beliefs and practices affect individual attitudes on important facets of life (Harpaz, 1998). The effects of religion on behavior can be subtle and direct. Faith provides a way of dealing with societal expectations in the face of individual wishes, expressions, and activities (Terpstra & David, 1991) and profoundly affects the practical level of organizational and business procedures.

There is a growing body of literature on workplace spirituality and religion that offers a number of insights, but it also has been criticized for lacking rigor or critical thinking (Gibbons, 2000). Max Weber (1905) was the first to identify the significant role that religion plays in social change. He went as far as to state that the Protestant Reformation triggered mental revolution that made possible the advent of modern capitalism.

Guiso, Sapienzad, & Zingalese (2003) found that religion is positively associated with attitudes that are conducive to free markets and better institutions. Religious people trust others more, trust the government and the legal system more, are less willing to break the law, and are more likely to believe that markets' outcomes are fair. The relation between religiosity and market mechanisms (incentives, competition, and private property) is more

mixed. On the negative side, religious people are more intolerant and less sympathetic to women's rights. The aspect of religion that is associated with economic attitudes is different across the intensity of religious beliefs. For example, more religious people are less sympathetic to women's rights.

A comprehensive research examining recruitment, promotion and advances at work based on religion or belief was performed by Bond, Hollywood & Colgan (2009) in the United Kingdom. Clear differences in employment rates were found according to race and religion; and certain religious groups also tend to be concentrated in particular industries. Muslims are more likely to be disadvantaged compared to the other religions. They have lower rates of labor market participation, and the highest male unemployment rate. Pay gap was found based on religion. They show that there is adverse pay gap for Muslims and a beneficial pay gap for Jews.

The relationship between religiosity and job satisfaction had mixed results in the research. Potential explanations for the mixed findings are offered by King & Williamson (2005). They found that religiosity influences what employees want from a job environment and their job satisfaction, but only when organizational context was controlled. By introducing and exploring the concepts of workplace acceptance of religious expression by organizations and individuals, they found that the interaction between an organization's stance and an employee's desire pertaining to the acceptance of workplace religious expression had the most significant influence on job satisfaction.

Empirical examination of the relationship between workplace spirituality and five prevalent employee job attitudinal variables was conducted by Milliman, Czaplewski & Ferguson (2003). The results indicate that each of the three dimensions of spirituality used has a significant relationship with two or more of the five job attitude variables examined. Employee spiritual values and practices, as well as workplace acceptance of such practices, appear to promote mental well-being and attenuate stress (Arnetz, Ventimiglia, Beech, DeMarinis, Lokk, & Arnetz, 2013). The findings showed that spiritual values in the workplace scale was positively associated with mental well-being and low occupational stress, and that the spiritual practices at work scale was positively associated with low work-related exhaustion. Spirituality that is tantamount to a secularized and falsely universalized form of Christianity, and a spirituality that silences religious and cultural difference will be short lived. However, workplace spirituality and religiosity research that acknowledges the unique labor histories of diverse marginalized groups of workers, and that looks to religion and secular culture for humanistic principles that can promote social justice, dignity, and mutual respect to all members of the workforce could prove very useful.

Religion, gender and work

Work plays an important role in the life of women and men in the modern world. The past several decades resulted in notable changes in women's labor force activities. Women's participation in the labor force significantly increased, particularly among women with children. More women work full time and year round than in past decades. Women's earnings as a proportion of men's earnings have grown over time from 62% in 1979 to 80% in 2008 among full time workers in the U.S. (Solis, & Hall, 2009). According to the Israeli Central Bureau of Statistics, in 1960, women accounted for 25.6% of total employed and reached 46.8% in 2013, compared to a 50.5% female share of the total Israeli population. The average weekly work hours per woman in 2011 were 36.2, as compared to 45.5 per men.

Even in the 21st century, women face many challenges. Many national cultures discriminate against women in the work environment. Women are constrained by obsolete organizational cultures and norms.

There are key differences between Feminine and Masculine Societies regarding general norms, family importance and work attitudes. More religious societies are expected to be more masculine and lagging behind the trend of increasing equality of women and men at the workplace. In those societies, women are more limited by attitudes and policies within their subcultures (Guiso et al., 2003).

The Israeli society is heterogeneous one, composed of different layers of groups, designated by ethnic affiliation, tradition and religious practices. The Jewish population in Israel can be divided into three segments according to religiosity level: seculars that are the majority, traditional people that practice some commandments, and religious people that practice almost all the commandments. The traditional and especially the religious groups are part of hierarchical, patriarchal societies which generate ideological differentiation between women and men concerning their roles and responsibilities at home and at working places. The masculine group is the dominant one, establishing the norms and attitudes, and strengthening existing stereotypes.

The aim of this study was to examine the influence of religious identity along the spectrum of intensity of religious beliefs on these related work subjects, according to gender classification. The Jewish population in Israel acted as a case study in this paper. This population can be divided into three segments according to religiosity level: seculars that are the majority, traditional people that practice some commandments, and religious people that practice almost all the commandments.

Method

Sample Characteristics

A total of 2,576 female and male employees participated in the study. They were employed by 11 big business organizations in Israel from all major industries: commerce, banking, services and telecommunication. The employees represent all positions and ranks in these organizations. The external validity of the sample was confirmed by comparing it to the socio-demographic traits of the total employees in Israel. The sampling method was a stratified sampling, strata defined by gender. Seventy-three percent of the respondents were female (1,883) and 27% (693) males. Sixty two percent of the women were seculars compared to 64% of men, 31% of women were traditional against 25% of men and 7% of women (127 employees) were religious compared to 12% of men (81 employees).

The family status of the participants was: 17% singles, 8% leaving with spouse, 67% married, 1% one parent family, 6% divorced, and 1% widower. Forty five percent of the employees had 12 or less years of education, 15% had 13-14 equivalent years, and 40% had over 15 years of education.

Research Procedure

The respondents were approached at their places of employment. Instructions were given to the responsible persons of the research in the organizations to select participants randomly in each rank (strata of ranks). The respondents were asked to complete the questionnaires, to seal the questionnaire in an empty envelope, and put it in a designated box in order to ensure

anonymity. All the respondents were informed that the questionnaires would be scanned optically by a computer.

Measures

The following variables were included in the questionnaire:

Working details: Seniority in the organization and in the current job, rank, working hours per week, part/full time job, number of subordinates, history of promotions, and participation in training programs.

Attitudes toward current work place: Importance and satisfaction attached to the following work attributes: job security, salary, promotion opportunities, interest, independence, flexibility in working hours, interrelationship with superiors, and relationships with other employees in the organization. (Guiso et al., 2003; Harpaz, 1998).

For these measures the respondents were provided alternatives along an equal-appearing scale ranging 1-5 (1= not very important or not very satisfied, and 5= very important or very satisfied).

The role of working domain in the employee life: Traditional stereotypes about occupational gender roles and family duties (Guiso et al., 2003). For these items the respondents were provided alternatives along a Likert scale (1= strongly disagree, 2= disagree, 3= neutral, 4= agree, 5= strongly agree).

The questionnaire also included the following background data: Gender, age, religious identity, marital status, children information, education, region of residence, and occupational payments like salary and various benefits.

Data Analysis

The statistical package used in this study was SPSS. First, descriptive statistics and One way ANOVA Test procedure comparing means for the two X three samples (defined by gender and religion) were applied in order to find the impact of religion by gender on work attitudes and work characteristics. Then, linear regressions for women and men were performed in order to find the relative impacts of the study variables and especially religion on the dependent variable: Current job's rank of the employee.

Results

Descriptive Statistics

Table 1 (next page) presents the frequencies of some work characteristics by gender and religion.

It can be seen that there is a big difference between women and men regarding work related factors: Men have higher education levels, are generally the main breadwinners have higher ranks at work, have more supervisory roles, earn more, have less part time jobs and work more hours.

Regarding the religious sector, it can be observed that religious women are relatively higher in being main provider of the family, while religious men have relatively more part time jobs. These differences emerge from the different role of women and men in religious society, where men are supposed to dedicate themselves to “Tora learning”. Usually also secular women and men are better off than the traditional or the religious ones.

Table 1. Frequencies and means of work characteristics for women (N=1,883), and men (N=693) by religion

	Women	Men
Education (average years):		
Secular	14.2	14.2
Traditional	13.2	13.0
Religious	13.4	13.2
Main breadwinner:		
Secular	26.4	57.6
Traditional	22.8	64.2
Religious	30.6	59.7
Ranks at work:		
<u>The lowest:</u>		
Secular	22.6	10.7
Traditional	29.6	16.9
Religious	33.9	14.8
<u>The highest:</u>		
Secular	5.8	13.4
Traditional	1.0	5.2
Religious	1.6	7.4
Subordinates -None:		
Secular	26.0	49.9
Traditional	25.6	50.6
Religious	27.0	26.3
Average salary (000 NIS):		
Secular	5.7	7.7
Traditional	4.6	6.1
Religious	5.0	6.8
Part time job:		
Secular	22.4	5.9
Traditional	22.7	6.3
Religious	30.6	5.5

Comparing Means- One way ANOVA Test

Table 2 (next page) presents attitudes toward work by gender and by religious identity.

As table 2 indicates, women attached higher importance to job security, flexible work hours and interrelationships with superiors. No significant gender differences were found regarding the importance of other attributes, particularly importance of appropriate salary. No gender differences were found regarding overall job satisfaction. However in three components, the satisfaction levels of men were higher: The job interest, the opportunity for self-development and job security.

Table 2 shows that the employees, both women and men, were relatively satisfied with interrelationships with superiors, job interest, flexible work hours, and job independence. They were relatively less satisfied regarding their salary and promotions opportunities, but their main dissatisfaction was with job security. Job interest and promotion opportunities satisfactions were significantly higher for men, while job security satisfaction was significantly less for women. Table 2 shows that the differences explained by the religious identity are usually not significant for men referring to the importance and satisfaction attached to work life conflict, apart from the importance of job security and interrelationships with superiors of secular men.

Table 2. Means of work related attitudes for women (N=1,948), and men (N=718)

	Importance ** attached to:		Satisfaction*** Regarding;	
	women	men	women	men
Salary:	4.68 Tra.- more	4.64 N.D.	3.25 N.D.	3.29 N.D.
Promotion opportunities:	4.38 Tra. more than Rel.	4.40 N.D.	3.09 Rel. more than Sec.	3.14 Sec. less
Job interest	4.70 N.D.	4.67 N.D.	3.86* Sec. less	3.96* Sec. less
Opportunity of development			3.45* N.D.	3.61* N.D.
Job independence	4.50 Tra .more than Sec.	4.46 N.D	3.71 N.D.	3.72 N.D.
Interrelationships with superiors	4.79* Tra .more than Sec.	4.65* Sec. less	4.16 N.D.	4.11 Sec. less than Tra.
Job security	4.62* Sec. less	4.49* Sec. less	2.61* Sec. less	2.77* N.D.
Flexible work hours	4.06* Tra. more than Sec.	3.80* Sec. less	3.75 N.D.	3.74 N.D.

*Means difference significant at the 0.01 level (2-tailed)

** Scale: 1=not very Important, 5= very important

*** Scale: 1= very much dissatisfied, 5= very satisfied

**** Sec. = secular, Tra.=traditional, Rel. = religious.

The picture is different for women, where there are significant differences between traditional women from either secular or religious women.

Table 3 presents results concerning traditional stereotypes factors about gender roles and lifestyle

Table 3. Means for agreement with traditional stereotypes for women (N=1,883), and men (N=693)

Agreement with the statement****	women	men
A man should be the main breadwinner of the family	1.90*	2.11*
Secular	1.84**	1.98**
Traditional	1.92**	2.28
Religious	2.27**	2.47
Men and women have equal roles in work life	3.80	3.86
Secular	3.83	3.91
Traditional	3.79	3.76
Religious	3.55**	3.73

*Means difference significant at the 0.05 level (2-tailed), between men and women

** Means difference significant at the 0.05 level (2-tailed), between difference in religious, in the group of men or women.

***Likert scale (1= strongly disagree, 5= strongly agree)

The results in table 3 show that there is partially an agreement about the role of work between women and men. Men still consider themselves the main breadwinner of the family. Yet, not significant differences were found between men and women about the issue of equality of man and women in their roles in work.

We can observe that religious women have higher stereotypes views and think that men have more central role in works.

Linear stepwise regression with rank of job as the dependent variable (Method=enter)

Tables 4a and 4b summarizes the linear regressions results for women and men with rank of job as the dependent variable.

Table 4a. Linear regression analysis for the job rank as the dependent variable for women (N=1883).

	Beta	t	Sig.
Working hours	.304	12.149	.000
Education	.302	11.258	.000
Man should be the main breadwinner	-.059	-2.337	.020
Traditional woman	-.057	-2.092	.037
Religious woman	-.041	-1.617	.106
Age	-.019	.759	.448
Men and women have equal roles in work life	.018	.704	.481

Total $R^2 = 0.222$

Table 4b. Linear regression analysis for the job rank as the dependent variable for men (N=693).

	Beta	t	Sig.
Education	.345	7.582	.000
Working hours	.230	5.336	.000
Man should be the main breadwinner	-.085	1.928	.055
Age	.053	1.218	.224
Traditional man	-.027	-.575	.566
Men and women have equal roles in work life	-.022	-.498	.619
Religious man	-.010	-.229	.819

Total $R^2 = 0.210$

The regressions results show that there are some different variables in explaining variations of jobs ranks of women and men. Some variables are the same but have different weights (betas). Working hours is the most significant factor for women, and the second one in significant for men. Education is the most significant factor for men, and the second one in significant for women. Norms concerning attitude toward family life combined with work life, represented by stereotype "Man should be the main breadwinner", is the third important factor, more significant for women, represented by negative number (see discussion). Regarding the main variable of this study, it can be seen, that both religious and traditional women and men have lower ranks in work, but the result is only significant for traditional women.

Discussion

The purpose of this study was to compare the attitudes, job ranks, and salaries of religious, traditional, and secular employees. Subjects were 2,576 employees that were employed by 11 business organizations. The study found that the some traditional stereotypes of gender roles in work place still prevail, especially among religious men and women. Moreover, the findings reveal that religion influences work norms and some work attitudes, mainly referring to women. Women in the religious society usually have more children and more duties at home. In many of the ultra-orthodox families only women are working while their husbands are learning religious studies for many years. Therefore, religious women usually have a greater work-family conflict as compared to men.

Surprisingly, the traditional women have significant differences in attitudes toward work compared to religious or secular women. We assume that these differences emerge from the dual belonging of the traditional women, they still adhere to norms and attitudes common in the religious society, and yet they are more exposed to the demands of the secular society.

Religious and traditional employees have lower job ranks and lower salaries as compared to secular ones. It can be caused by the importance they assign to their other duties outside the work, such as family raising and religious duties that include religious learning and prayers. The lower job ranks and salaries of religious and traditional employees may have two main reasons: the first, their difficulty to combine their roles in family life and at work belonging to different worlds, and the second may be caused by discrimination. The secular employees are less satisfied in their workplace in spite of their higher job ranks and salaries. It may be explained by lacking spiritual meaning in life. Weller and Tavori (1972) found that religious workers had stronger intrinsic orientations to their work than their nonreligious counterparts. Martinson and Wilkening (1983) concluded that religion affected intrinsic (but not extrinsic) job satisfaction.

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Assessing the risk of MNC interventions in employees' nonverbal holy wars: A cultural intelligence model

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Abstract

The wearing of religious symbols in the workplace has met with political controversy worldwide. Yet, international management researchers have been silent. Researchers have a responsibility to guide international managers how to mitigate polarization risk. Accordingly, this paper develops a model for MNCs to consider interventions. It uses social categorization theory to explain how the learned salience of religion-based value conflict over societal resources might trigger social categorizations processes that impede motivational cultural intelligence (CQ), and how religious attire might moderate that relationship. It then uses social learning theory to identify specific individual and societal variables that contribute to learned salience of religion-based value conflict. Finally, it uses these insights to consider diverse approaches to interventions related to religious symbols.

Introduction

Style of dress (clothing and/or accessories) and religious differences both represent potential sources of noise in cross-cultural communication (George, 2003; Hargie, Dickson, Nelson, 2003). When these noise factors are combined via the wearing of religious symbols (in clothing and/or accessories), one might expect the potential for noise to be magnified, along with magnified risks for interpersonal relations in the workplace. Indeed, due to both changing immigration patterns (Wayland, 1997) and globalization (Cash et al., 2000), the wearing of religious symbols in the workplace has been accompanied by considerable controversy, as evidenced by legal challenges and extensive media coverage about such workplace conflicts (e.g., Cash et al., 2000; Chai, 2013; Fregosi & Kosulu, 2013; Sibley, 2013).

Although much of the media attention has arisen in relation to the growing variety of "manifestation requests" (i.e., requests to permit the wearing of religious dress and symbols) (Cash et al., 2000) made for religious accommodation by immigrants in Western societies, it seems unlikely that this challenge is faced exclusively by managers of domestic organizations operating in the West. In an international workplace, expatriate managers will encounter many novel religious expressions. Religious differences may potentially arise not only among the host country national (and third country national) employees whom expatriates are expected to manage, but also between expatriate managers and their host country national employees (or colleagues). Expatriate managers may face challenges not only if they wear religious attire in secular contexts, but also if they wear religious attire in contexts that are religious but are hostile to the expatriate's religion, or if they are secularists who balk at wearing religious attire when it might be strategically more effective for the organization if they did so.

Although religions differ in regard to whether it is men or women who are expected to wear religious attire, it is particularly interesting that reviews of the literature on expatriate women (e.g., Altman & Shortland, 2008) have never addressed these issues, given that in many contexts, religious differences are intricately connected to views about gender equality (Raday, 2009). In their recommendations of themes for future research on female expatriates,

Altman & Shorthand (2008, p.210) did not mention religious issues, but they did identify “environmental geographies” as an important theme, noting as well that “We know next to nothing about the experiences and preferences of non-Western women in the international assignment arena”. Indeed, even the United Nations has acknowledged there is a lack of practical guidelines for assessing the risk of religious accommodation in international workplaces (UN Global Compact, 2013).

When the issue of overt symbols of religiosity in the workplace has been explicitly addressed, it has primarily been addressed through a legalistic lens, and/or in an exclusively domestic (i.e., non international) organizational contexts. There are two reasons that this has been insufficient:

First, the predominantly legalistic approach – which advocates that managers should learn what legislation prescribes or prohibits, and then proactively conduct themselves and their organizations accordingly (Cash & Gray, 2000) – is insufficient because multinational organizations have a duty to proactively deal with this aspect of diversity before it becomes a question of legality. Once a legal claim has been filed, the organizational climate has likely already been damaged, potentially along with the organization’s reputation, its productivity, and its ability to attract and retain top talent (Cash & Gray, 2000). A vivid illustration of this point is the immediate, creative, and successful recruitment campaign launched by an Ontario hospital in Canada. In the midst of heated controversy over religious symbols in the workplace in the neighbouring province of Quebec, this Ontario hospital placed recruitment ads in Quebec media for health workers who were in short supply in Ontario, along with the slogan “We don’t care what’s on your head. We care what’s in it” (Chai, 2013).

Second, even in countries which have democratic judicial systems, legal opinion is still evolving in regard to the boundary between one kind of human right (i.e., the right to wear religious symbols as a means of religious freedom) and another (e.g., the right to an environment free from religious harassment) (Cash & Gray, 2000; Scheef & Stone, 2013). Multinationals increasingly operate in countries which may have weak legislative protections for religious diversity (or insufficient enforcement of it, as described in Hargie et al.’s (2003) study of Northern Ireland workplaces). In such contexts, the law may offer limited incentive or guidance for proactive intervention.

Although King and colleagues’ research broadened the analysis beyond the legal frame and thus contributed significantly to theoretical development on the matter (e.g., Gebert, et al., 2013; King, 2008) their groundbreaking research has nonetheless been exclusively American in context. Consequently, it lacks consideration of societal variables that would be relevant to a multinational. Moreover, their focus on the criterion of relational conflict leaves unanswered questions about the implications of religious expression for informational/decision-making outcomes (e.g., knowledge exchange) (Williams & O’Reilly, 1998). Motivational Cultural Intelligence (CQ) would seem to be a more immediately pertinent criterion of interest in the international realm, because it has been defined as an individual’s willingness to “direct attention and energy toward learning about, and functioning in, situations characterized by cultural differences” which characterize the international workplace. Trust and openness are critical to knowledge sharing for global competitiveness (Cabrera, Collins, & Salgado, 2006). Research on religion in the workplace may have been neglected due to politically correct inclinations. Insofar as this is true, political correctness offers a false economy (Hargie et al, 2003; King, 2008) Nancy Adler (2008, p.101) similarly recognized the inclination to adopt a “culture-blind approach”, but emphasized that it confuses “the recognition of culturally based differences with the judging of those same differences, and that, as such, it “precludes our

ability to minimize the problems caused by cultural diversity and to maximize the potential advantages it offers”.

Accordingly, this paper departs from previous research by arguing that research is needed to evaluate the risks that religious expression (and interventions to address it) may pose to employees’ motivational CQ in international contexts. Without both a psychologically grounded and socially contextualized understanding of these risks, the choice of accommodation (or non-accommodation) may be construed as uneven ingratiation (or, conversely, indulgence of discrimination) rather than sustainable, culturally intelligent integration. Insofar as this occurs, it may not only fail to achieve the intended organizational results, it may also risk exacerbating broader societal tensions.

Therefore, the three key questions driving this paper are: First, how might the wearing of religious symbols impact the relationship between a learned perception of scarce societal resources and motivational CQ? Second, how might social learning about scarce societal resources impact motivational CQ? And third, how might a close analysis of such variables inform the creation of a ‘safe space’ in which managers may explore possible interventions to reduce dysfunctional polarization on the basis of religious differences?

The Effect of Learned Salience of Religion-Driven Conflict on Motivational CQ

This section uses social categorization theory to predict that the salience of negative categorizations of cultural outgroups would increase the likelihood of further attention to negative stimuli about cultural outgroups. That is, the salience of religiously driven conflict over societal resources may be a biographical information difference that will adversely affect motivational CQ. It draws on research from De Jong, et al (1976); Kunovich & Hodson, 1999; Welch, Sikkink, Loveland, 2007; and Almond, Sivan, & Appleby, 1995) to define “the learned salience of religion-driven conflict” and to justify its relationship to motivational CQ.

The Moderating Effect of Religious Symbols on the Relationship between Salience & Motivational CQ

In Ang & Van Dyne’s (2008) conceptualization of CQ, they positioned situational factors as moderators of the relationship between CQ and the outcomes of cultural adaptation and performance, rather than as moderators of the relationship between antecedent individual differences (e.g., biographical information) and CQ. However, this section argues that situational factors may also moderate the relationship between certain antecedent individual differences (e.g., biographical information) and motivational CQ. In particular, it focuses on how, through social categorization process (Williams & O’Reilly, 1998), the introduction of religious symbols can aggravate the relationship between prior biographical information (i.e., learned salience about religiously-driven societal conflicts over scarce resources) and motivational CQ.

Antecedents of the Salience of Religion-Driven Conflict over Societal Resources

This section argues that a deeper understanding of the content of the societal and individual variables that contribute to the salience of religion-driven conflict is important. For example, although multinationals may have limited leverage for influencing broader social conflict, a thorough understanding of the societal variables that contribute to such conflict may be helpful for diagnosing the level of religiosity risk posed by diverse societal contexts, as well as for developing greater insight into how diverse approaches to managing religious conflicts are likely to be received. Therefore, a variety of societal social learning sources are

considered here (including both direct experience and less direct vicarious experiences) (Bandura, 1986).

Vicarious Learning

This section discusses the role of vicarious learning in regard to the relative strength of institutional support for religious plurality (Muller & Neundorf, 2012; Wayland, 1997; Hargie et al., 2003) versus for gender equality (Norris & Inglehart, 2004; Fregosi & Kosolu, 2013), and how this may contribute to an increased salience of religious-based conflict. It concludes by discussing how public knowledge may contribute to the salience of religion-based conflict by promoting vicarious learning about the relative strength of these two kinds of institutionalized support (Heinrich, 2008; Evans, 2011). Throughout, it uses various national examples derived from accounts in Israel, France, and Quebec.

Enactive Mastery

In addition to prior vicarious learning experiences, employees may have had direct interactions with individuals who have different religious identities (even within the same religion, or of a secular background), and these, too, may have raised their salience about religious-based conflict. This section draws from Kunovich & Hodson (1999) Gebert et al. (2013) Norris & Inglehart (2004b), and Woods, 2013 to suggest that personal experiences are likely to be more convincing at developing salience than any attempts at verbally persuasion.

Implications for the use of Interventions in Relation to Religious symbols

How multinationals may transform identity abrasions (Ely, Myerson, & Davidson, 2006) into an organizational pearl that respects mutual interests is less than obvious. For many faiths, wearing religious symbols is not considered entirely volitional. At the same time, for many women (and men), both religious and secular, the values of gender equality and liberty are highly prized as well. Behavioural CQ suggests that it is useful to underscore the imperative for each individual to move outside of his or her comfort zone in order to forge the common ground that is at the very heart of coexistence. If common ground is to be a sustainable basis for the promotion of coexistence, a line must be painted in the middle of that ground, to signify both respect for boundaries and the two-way nature of the street. The question, however, is how to negotiate that line when the nature of such conflicts, may not only be pervasively salient, they may also be longstanding, involve zero-sum conceptualizations, and be aggravated by simplified stereotypes and mutual disidentification with the 'other'. In other words, the problems of social categorization under conditions of religious conflict fit many of the challenging characteristics of an intractable identity conflict (Fiol, Pratt & O'Connor, 2009). As Fiol et al. (2009) noted, intractable conflicts based on identity (in this case, religious identity and the accompanying social consequences of religiosity) are very difficult to resolve.

Fiol et al. (2009) compellingly argue that the components of an intractable problem must be represented in the components of the solution. Accordingly, they recommend a multiphase model for intractable conflict resolution, which is hierarchical (but potentially bidirectional) in nature. Therefore, the remainder of this section draws from their model, from the preceding analysis (about the individual and societal sources of salience about religion-based value conflict), and from categorizations of multicultural conflict resolution (cultural avoidance, cultural dominance, cultural accommodation, and cultural integration) to explore how enable multinationals may assess interventions on this issue in a way that is more supportive of sustainable, culturally intelligent integration rather than of uneven ingratiation (or indulgence of discrimination), and by extension, more supportive of motivational CQ.

Discussion

Theoretical Contributions

Although there may be legitimate grounds for fear in such situations, fearful people can make for a frightful world. The risks of broader social cleavages over religious values entering into the workplace are very real, and employers have a duty to recognize this, and care for it. Despite this, surprisingly little attention has been devoted to the religious issue in academia. This paper has contributed by applying social categorization theory, social learning theory, and research on CQ to illustrate the underlying individual and societal variables that can contribute to motivational CQ. Future research could explore these issues more systematically by looking at diverse contexts and empirically documenting the nature of the influence on motivational CQ. Future research might also explore duty of care on religious matters in regard to interactions with external stakeholders (e.g., customers).

Practical Contributions

From a practical perspective, this paper has also offered suggestions for how these variables might inform decisions as to what constitutes culturally synergistic accommodation (versus discrimination or uneven ingratiation). It has underscored that multinational organizations have a decision to make about how smoothly they will enable the broader cultural negotiation process to proceed within their workplace, and has suggested a variety of potentially bridging activities, which represent enactive mastery experiences that may reduce the salience of religious-based conflict by broadening differentiated perceptions of the outgroup, and, ultimately, raising motivational CQ.

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Values based organisational development in the South Pacific: A case study from the Samoa Ministry of Health

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Abstract

The objective of the research was to assess the efficacy of values based, culturally specific trans-national organisational development. The setting for this research was an organisational development program conducted for the Samoan Health Sector in Samoa. A qualitative case study methodology was adopted, using two main sources of data. The first source of data consisted of a written qualitative survey by all participants at the conclusion of each training module. The second form of data was an independent review of the program using in depth semi-structured interviews (by the second author). Further program perceptions are provided by the first author. The research findings identified that the strong impact of the program was achieved through an alignment of the program objectives with national and individual values, engaged learning, program relevance and strong organisational support.

Introduction

Organisational development training is too often treated as just 'another commodity' that can be applied universally across different organisations or even different countries, with little or no regard for the individual needs of participants and the organisation (Porod, 2010). However, there is growing acknowledgement of the importance and need for organisational development to be not only technically appropriate but also contextually and culturally specific (Friedman et al., 2013). The role of culture and values in the understanding and design of organisational development training deserves more attention and research (McKnight, 2012).

During 2013 the Australian based lead author conducted a year-long organisational development program for 52 selected individuals working in senior positions of the Samoan Health Sector. The health sector includes the Ministry of Health (MOH), the National Health Service (NHS) the National Kidney Foundation (NKF) and covers the full range of health services provided to the Samoan people. The program was conducted in Samoa and was funded through aid programs from Australia and New Zealand. The goal of the program, termed the Health Management Development Program (HMDP), was to enhance the management expertise and leader effectiveness of senior health clinicians and bureaucrats, and in so doing, act as a catalyst for positive cultural change within the Samoan Health Sector. To achieve these goals the program was designed and delivered with a focus on practice based leadership and management skill acquisition, within the context of individual, organisational and national values. The program has provided a unique opportunity to assess the efficacy of contextually and culturally specific values based organisational development. The program was previously conducted in Samoa for the Health sector by the first author during 2006/ 2007.

This paper commences with the research aim and methodology. An overview of the HMDP and the context in which it was conducted is provided. Key findings from two data sources as

well as observations by the first author, of other factors impacting program efficacy are then presented. The paper concludes with a brief discussion.

Research Aim and Methodology

The research aims to explore the efficacy of the HMDP. This paper assesses the impact of the program and the reasons why it achieved the influence that it did. This practice based research is constructed on individual perceptions by program participants and some key stakeholders. It is interpretive in nature. This interpretive epistemological stance, with the belief that the world is socially constructed and subjective, leads to a greater focus on meaning and allows for a richer and deeper understanding of how and why people think and react (Crotty, 1998; Easterby-Smith, Thorpe, & Lowe, 1991). Consistent with this epistemological approach, perceptions of the program by the first author have been included in the findings.

The qualitative case study methodology used two main sources of data. The first source of data consisted of a written qualitative survey of all participants at the conclusion of each training module. The second form of data was an independent review of the program by the second author. The independent review (conducted by the second author) was used to provide balance to the findings; as well as to mitigate against potential accusations of bias caused by the first author's role of program architect and co-facilitator. The use of an independent review is an accepted methodological approach (Harrell, McClenaghan, & Johnston, 2001) to assess this form of organisational development.

HMDP Structure and Context

The HMDP was designed to be more than a skills training program. As stated above, it was designed to enhance key managerial skill levels and in so doing to act as a catalyst for positive cultural change across the Samoan Health Sector. The participants were drawn from all pillars of the Health sector including clinical staff from the National Health Service and public servants from the Ministry of Health. As part of the program, the HMDP required participants to complete a Diploma of Management that provided direct credits into an Australian University Bachelor of Business (B.Bus).

The program was designed and conducted by two Australian based facilitators. The first author as well as being one of the two facilitators was the project manager for the program. The facilitators attended in Samoa for each component of the program. The Australian based facilitators have been visiting Samoa since 2003. They had previously conducted a program for the health sector of Samoa in 2006/2007 and other Samoan public and private sector organisations between 2003 and 2006.

Fifty two participants enrolled in the program. They were divided into two groups of twenty six so that each formal workshop component of the program was conducted twice. For cost reasons these were always conducted back to back. Participants were required to attend and participate in the workshops, then between workshop sessions work in small study teams (action learning set groups), reflect on workshop experiences, complete individual assignments based on the specific management competencies covered in the program and, progress a major workplace improvement project.

A formal steering committee, made up of key Samoan stakeholders and chaired by the Director General of Health, oversaw the program. Both facilitators worked closely with the

steering committee. On each visit to Samoa the facilitators met both formally and informally with the steering committee to discuss participant progress, program content and any problems or issues that might arise during the program. The components of the program structure are briefly summarised below.

Orientation: The program commenced with an orientation week. The purpose of the week was to allow the facilitators to meet with key stakeholders and review and refine the program design, conduct a one day workshop to prepare participants for the program, and to participate in a formal Samoan program launch.

Formal teaching modules: There were three intensive in-country workshops, one of three days duration and two of five days duration. Formal subject areas covered included: project management, workplace planning, personal development, continuous improvement, operational planning, public sector service delivery, workplace safety, leadership and teamwork, performance management and effective communication and public speaking.

Assessment: All subject areas were individually assessed against specific competencies of the Diploma of Management awarded under the Australian Skills Quality Authority (ASQA). Participants were required to work on assignments between the formal modules and submit the assignments at the subsequent modules.

Workplace improvement project: It was a key program requirement that clinicians, administrators and policy analysts from across the health sector collaborated in small teams to progress a significant improvement project on an aspect of the health sector. There were a total of ten study/project teams. The teams formally presented their project findings at the conclusion of the HMDP in September 2013. A volunteer graduate of a previous program was allocated to each project team to act as mentor.

Graduation week: The final week of the program consisted of finalisation of assessments and most significantly two formal presentation day. During these days each study team formally presented their project findings and report in a public forum to invited guests from the health sector. The week concluded with a formal graduation ceremony and celebration.

Samoan Values and Culture

The physical description of the program outlined above, would be incomplete without also focusing on the important role that respect for Samoan values and culture played in the program design and implementation. Samoan culture as with any national culture is complex, diverse and difficult for outsiders to fully comprehend. Fa'a Samoa or 'the Samoan way' is a high power distance (Hofstede, 2001; G. Hofstede & Hofstede, 2005) all-encompassing traditional system that spells out relationships, status and modes of behavior. The Samoan culture is a strong culture with a clear emphasis on the Christian faith and family values (Lui, 2003).

It is a fine balancing act to take the national values and culture of a country into consideration when designing an organisational development program. The key is treating the culture with respect and including cultural issues in the program without overdoing it or offending. Whilst program design included a number of culturally specific case studies and activities, the key issue was ensuring that both facilitators understood the Samoan values and culture well

enough to be able to use this knowledge in the facilitation process during workplace discussions.

Findings from the Post Workshop Survey

The post workshop questionnaires were not specifically designed for this research project. The purpose of the surveys was to assess the perception by participants of program efficacy. They were completed by all participants at the end of each workshop, summarised and presented in regular updates to the HMDP steering Committee. Whilst acknowledging the potential limitations of post workshop evaluations (Black & Earnest, 2009; Patton, 2008, 2011), when taken into account in conjunction with the independent review below, they assist in understanding the program's impact. Three key areas from the surveys are relevant to this research. These are: The relevance of the program content; how this content was applied into the workplace by participants; and, the quality and relevance of program delivery.

Program content: Overall there was an extremely positive response to the program content. In particular the practical nature of the content was emphasised. Two typical responses were *"I found it very helpful and best thing is I can apply it to my daily work"* and *"All three [topics covered in module two], I suppose. But I believe Continuous Improvement is useful to me as this is something new to me... it is crucial in the health sector"*.

How the content was applied: The initial responses at the end of the workshop were usually quite general, for example *"Yes, I can apply to where I work and it is very useful for me in the future and also my title as a Clinical Nurse Consultant"*. However, the program assessment process included assignments where participants were required (forced) to apply learning from the workshop. Therefore, submitted assignments handed in at subsequent modules provided solid evidence that tools learnt in the workshop were being applied.

The quality and relevance of program delivery: The program participants were extremely positive towards the facilitation style and content. The three following examples are typical of responses. *"Facilitation-Excellent, clear, precise, interesting, relevant, knowledgeable"*, *"The delivery of the course was always clear and spot on to the type of working environment we are working in"* and *"So lively, interesting. Excellent examples used"*. Of more interest were the comments on cultural appropriateness, for example, *"You guys look the part and write the enviro/culture appropriate with your cool attitudes and great shirts and lava lava"*.

It is worth noting that not all comments were favourable. However, the very small number of comments that were negative tended to focus on the intensity of the workshops and requested more time rather than any concerns with the content or style of program.

Findings from Independent Review

The second author spent two days undertaking in-depth interviews (Kvale, 1996) in August 2013 during module three of the program. There were 11 interviews with participants from the 2013 HMDP and 2 with 2007 HMDP graduates who are now both key stakeholders in the implementation of the 2013 HMDP (n=13). All interviews were digitally recorded and transcribed under standardised guidelines for accuracy purposes.

The interview process clearly identified that participants and the other key stakeholders perceived that the program achieved its stated aims. The four strongest themes in relation to this are briefly outlined below.

Program impact and viral learning: An interesting aspect of the program impact is the spread of ideas from the program through to other areas of the health sector and beyond. The authors refer to this spread of ideas as ‘viral learning’.

This theme has emerged as a major impact of the program and relates to issues of empowerment, networking and culture change. A significant number of participants commented on the HMDP’s influence throughout the health sector and in some instance to other government organisations. Part of the reason for this is simply that the program design has forced key influencers from across the sector to work together as part of the program. As one interviewee notes *“I mean I always work at managerial level and I wouldn’t have met all these other colleagues and now we say, “Can you help me out? How do I do this?” Now I have certain contacts in this division and the hospital, in this NGO”*. A number of respondents noted the significantly improved networking opportunities and outcomes arising from their participation in the HMDP. There are a number of characteristics of these observations. Many participants have noted how empowered they have felt as a consequence of their learning and how this has enabled them to utilise a wider range of contacts to further build on their learning and professional practice. As one notes *“Yes. ...It’s all part of networking too... it’s a good programme where you will meet all these different people because everybody is different, and they have all their different personalities”*.

It is worth noting that the major improvement projects were significant in encouraging networking as their successful completion, in most cases required sector wide collaboration. A useful example was provided by an interviewee who stated, *“So some of the health sectors are agencies so we are working together with partnerships... before I came to this course, I didn’t know ... about the partnerships, about the health sectors, but ..I know [now] there are a lot of people that should be involved...a medical engineer for the machines, the people for the building ... and also the ...Ministry of Natural Resources and Environment, so those are people we need to involve a bit more in the planning process”*. This interviewee went on to discuss how the proactive sharing of information with other stakeholders was a much more conscious activity as a result of the applied nature of the HMDP and the necessity for projects designed within the program to draw in other agencies previously not as clearly integrated

Finally, there was a sense of excitement which spread with the program. One interviewee reported that other departmental personnel have expressed envy that they had not been able to participate in the program due to lack of available donor funding in their areas. This excitement appears to have led to public sector professionals who were not part of the program to be willing to be influenced by the learning. HMDP participants acknowledged that they have been influencing learning in those other departments through their increased networking (as a result partly of the confidence gained) and sharing their learning experiences.

One participant from the 2007 program explained that this sense of excitement was partly generated by the perceived success of the program conducted in 2006/2007. Firstly, many participants from the earlier HMDP have moved to higher levels of seniority within the MOH and other government departments and secondly, some of the projects from the 2007 program led to significant improvements. As one previous graduate of the earlier program stated (of their 2007 project) *“...our project...reviewing the paediatric services and infrastructure. After the HMDP program ...they revamped the paediatrics for the children...we presented at the NHS board... and they took up most of our recommendations”*.

Values and Cultural Alignment: A consistent theme throughout the interview process concerned the fact that the program was appropriately respectful and aligned with Samoan culture. This point was continually referred to in interviews with comments such as “*they get us*” and “*it was meaningful*”. Key issues continually identified during the interview process included facilitator cultural awareness, alignment of facilitator activity and participant values, facilitator empathy towards Samoan cultural values, and program design reflecting real life and contemporary workshop and program activities.

It was significant to note how participants valued the effort of the facilitators in adopting a culturally empathetic approach. For example, “*It was really like a friendly atmosphere in terms of a learning environment for us in the Pacific situation*”. Examples of the facilitators engaging culturally included their frequent adoption of Samoan traditional dress for in class activities, frequent (and sometimes amusing) adoption of basic Samoan language in their presentations and just general cultural awareness displayed by the facilitators.

Engaged Learning Culture: One of the most common experiences cited by interviewees, concerned the emphasis the facilitators placed on engagement and fun during the learning process. This might, at first, seem trivial; however, encouraging a more engaged and fun environment during the program appeared to help break down traditional Samoan status barriers. The facilitators used their knowledge of Samoan values to create an environment that allowed participants to feel comfortable. A typical interviewee response, “*it’s their skills of teaching... there’s a to and fro type of communication... their expertise and their experience comes out in what they teach us... And being friendly and always being tolerant*”.

The second author had the opportunity to informally observe a group based problem solving activity during the program. With both facilitators attired in Samoan dress, and the room divided into project teams, a problem solving task was undertaken that required creativity, lateral thinking and effective use of group expertise. During this activity the room was filled with laughter and shared joy as each team found success in the task. During informal discussions with the participants after the activity had concluded, it was expressed to the second author that the level of energy in the room and the obvious sense of engagement and fun was typical of the style of the facilitation throughout the program.

Relevant and Appropriate Program Content: It should also be noted that the engagement process was not just about the use of classroom activities and fun. Participants frequently expressed satisfaction in the relevance and applicability of the program content. As one respondent noted, “*So we did that exercise yesterday and we were taught how to identify risks and what types of hazards and ... we actually went and did it instead of sitting in the classroom and reading about it, so I think there was much more learning doing it that way*”.

Given the diversity of the participant backgrounds and roles, program relevance was a significant achievement. Participants from the clinical side of the Health sector (for example Doctors, Dentists, Nurses, and Physiotherapists) were required to work and study with participants from different layers of management in the various departments within the Ministry of Health. As one participant commented, “*it’s very realistic and applicable to my level of job but the way they deliver it makes it more realistic, makes it enjoyable*”.

Observation by First Author

The program evaluation process and the independent review were both very flattering to the facilitators. However, the first author as one of the two facilitators involved with the program acknowledges that there were numerous other factors that were not consistently identified by the participants in the post program review or the independent interviews that contributed to program efficacy. These factors provided an environment and structure that enabled the facilitators to be seen in a positive light. These included:

A Samoan steering committee: It is important to note that a program of this nature needs a strong driving committee. The facilitators, based in Australia, have limited control over the behaviour of the Samoan participants between workshops. Furthermore, as the facilitators were outside the Samoan health system it was inappropriate for them to take any enforcing role (other than academic assessment). The HMDP steering committee commanded the respect of the program participants and provided invaluable support and guidance to participants during the program.

Program structure: The action learning approach adopted as part of the HMDP is a proven learning paradigm that allows for effective transfer of learning. Furthermore, the workplace focused Diploma of Management qualification offered a far more practical approach to organisational development than the potentially more theoretical qualifications provided by Universities. The assignment structure between workshops ensured that the participants were continually working on program content between formal workshops.

Participant selection: Whilst, there was an understandable variance in experience amongst the group, they were all of sufficiently high a standard and motivated to successfully complete the program. Positions on the HMDP were competitive and it is fair to say that it was considered a privilege and great opportunity to attend.

Departmental support and encouragement: The general support provided by departments in the health sector to allow the participants time off work to attend modules was invaluable. Furthermore, there was a support person allocated for the program. This not only allowed for smooth administration and liaison between the facilitators and the HMDP participants, the steering committee and other key stakeholders but also provided the facilitators with a resource to assess whether proposed workshop activities were relevant and appropriate.

Mentors: The use of mentors from the previous HMDP in 2006/2007 and the Executive Development Programs (EDP) conducted by the facilitators in Samoa between 2003 and 2006 was an invaluable participant support mechanism.

The physical learning environment: The physical environment in which the training takes place should never be ignored. The use of a large, modern, air conditioned facility (particularly in tropical Samoa) had a positive impact on the training.

Discussion, Recommendations and Conclusion

This brief discussion focuses on a number of key issues that have emerged from the research project and concludes with the limitations of the methodology and recommendations for further research.

Values, culture and engaged learning: The findings from this project reinforce previous research that has demonstrated the critical importance of understanding and integrating values into leadership behaviour and development (Bruno & Lay, 2008; Dolan, Garcia, & Richley, 2006). The research has clearly illustrated that values and cultural alignment can assist in the development of a powerful model for leadership development. Furthermore, there is little doubt from all sources of data that facilitator experience and skill, and an engaged learning culture were significant factors in the overall positive outcome.

Collaboration: Whilst not commonly identified by program participants, the critical role of the steering committee and organisational departmental support in the program outcome were emphasised by previous HMDP graduates and the first author.

Viral learning: There was consistent evidence presented through the survey and interview data that knowledge from the HMDP has extended further than to HMDP participants alone. Learning has been shared within the Health sector and beyond. Whilst this may be partly due to the relatively small size of Samoa and its integrated village structure, it can also be inferred that equipping program participants with the skills and self-belief to move beyond their own areas of responsibility has been a significant program outcome.

Limitations of methodology an opportunistic research approach: This research project was opportunistic in nature and based on perceptions of program participants and key stakeholders during the time the program was conducted. Further post program reviews using a wider selection of stakeholders would add significant depth to the research findings. Subject to approval from key stakeholders in Samoa, this expansion of the research project is intended by the authors.

Finally, this paper has described outstanding results arising from a values based, culturally and contextually specific organisational development program conducted in Samoa. The combination of factors involved in the programs impact and the apparent spread of the learning beyond the program participants alone, offer a base-line methodology in training design that warrants further research.

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It's all in interpersonal interactions: Empowerment, organizational cynicism, and perception of organizational politics

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Abstract

Organizational cynicism has been found to an impediment in making successful change efforts in the organization. Perception of organizational politics (POPS) has been posited to be linked to cynicism but empirical proof is limited. This paper conceptualizes and tests a path model to counter cynicism. Empowerment is hypothesized to reduce cynicism which in turn would influence POPS. These would together result in higher satisfaction with work and manager. Interpersonal interactions moderated the relationship between cynicism and POPS. Structural equation modeling was used to test data collected from 340 participants in IT Service industry. Design involved control for various conditions. Implications for theory and practice improvements have emerged.

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Introduction

“Change is the only constant in this world” (Heraclitus, 540 BC-480 BC), has come to become a cliché in present times. If this is indeed so believable, organizations around the world are replete with stories where change management is resisted on some pretext (Kanter & Mirvis, 1989; Kouzes & Posner, 1993). Cynicism in organizations, especially against organizational change has been argued to be an impeding force against efforts directed towards creating future ready organizations (Reichers, Wanous, & Austin, 1997).

Cynicism as a concept could be studied from a variety of standpoints (Dean Jr., Brandes, & Dharwadkar, 1998). The approach could vary from studying cynicism as a trait (Wrightman, 1974); cynicism against society or its institutions (e.g., Kanter & Mirvis, 1989); being cynical about/against an occupation (e.g., Niederhoffer, 1967); or cynicism against organizations in general or its decision makers or some objects within the organization (Andersson, 1996; Andersson & Bateman, 1997; Riechers et al., 1997). It often appears that while the first few forms are protagonists' evaluations of systems or individuals, the last one (against change) evaluation of a particular form of action.

Nonetheless, Dean et al. (1997) have termed cynicism as an attitude following the theory of attitude formation (Ajzen, 2001; Ajzen & Fishbein, 1980). From various strands mentioned above, one needs to be chosen. This study is situated within the territory of organizational behavior, with system, individuals, and their interactions being the targets. It is therefore the last category of organizational cynicism that is relevant for this study. Specifically, the relevance emanates from the ability to use to its focus on – (i) organization as the context, (ii) possibility to delineate individuals and systems, and (iii) relevance for the target. Organizational cynicism (in the organizational form) could be defined as: “... a negative attitude toward one's employing organization, comprising three dimensions: (1) a belief that the organization lacks integrity, (2) negative affect toward the organization, and (3)

tendencies to disparaging and critical behaviors toward the organization that are consistent with this belief and affect (Dean et al., 1997: 345).”

As per this definition, cynics in the organization shall engage in shunning the organizational agenda and perhaps actively dissociate themselves from the organization. Cynicism leads to strong denial against the environmental forces that demand change be undertaken. Managers often struggle with countering the cynicism amongst people, and often resorts to strong coercive action against action groups. While the construct has been in existence for a long time, efforts have largely been concentrated to conceptual refinement. From another perspective, the time is now ripe to surpass conceptual boundaries of theorization and move to practice context in order to aid theory development and refinement in due course.

Conditions for cynicism

Reviews on cynicism have pinned the antecedents on individual traits, breach of social contracts, and negative evaluation of top management actions and organization change decisions (Abraham, 2000). This position has largely culminated in treating cynicism as a trait in previous research (Hochwarter & Byrne, 2005) thereby declaring it to have a stable dispositional quality related to high neuroticism, high trait anxiety and low leadership potential (Guastello, Rieke, Guastello, & Billings, 1992). Executive education also finds a large number of takers for dealing with “resistance to change”. Often such resistance to change is a product of loss of faith of leadership, reinforced by a deeply held belief that the change attempt is not going to be successful. Such attitudes impede efforts directed towards creating a future ready organization (Recihers, Wanous, & Austin, 1997).

Most conceptualizations argue that cynicism is largely an individual based phenomenon, with little understanding of systemic influencers that shall promote or alleviate organizational cynicism. Consequently, there is little understanding of the impact management practices may have in promoting or alleviating cynicism from organizational systems. This paper argues that using tenets of Theory of Planned Behavior, if individuals make choices that further feed in to their attitude formation, there has to be a larger influence of the context of an individual in which choices are made. If the situation around an individual reinforces ambiguity around a situation, people get more confused and find it all the more difficult to accept anything that challenges the norm. Thus, it builds into a negative spiral of cynicism manifesting through previous learning from failed attempts, ineffective leadership practices, lack of participation in decisions, and lack of procedural justice (Bernerth, Armenakis, Feild, & Walker, 2007; Wanous et al., 2000).

There is another missing link between individual traits and their evaluation – the impact of the situation around an individual. Cynicism against change has been argued to result in job dissatisfaction, lower citizenship behaviors, poorer perceptions of justice, and lower commitment to the organization (Abraham, 2000; Bernerth et al., 2007). Literature has thus far ignored the impact of organizational environment, specifically of organizational politics on creation of such cynical evaluations. Byrne and Hochwarter (2008) reported that individuals with lower cynicism showed almost no change in performance even by increasing organizational support, and high cynics doubted or countered high support conditions by exhibiting lower task performance. They draw upon Andersson’s (1996) conjecture of cynicism cultivating in environments fraught with broken promises, making conditions ripe for higher perception of organizational politics.

Perception of Organizational Politics and Organizational Cynicism – Solving

Perception of Organizational politics (POPS) has been posited to be open to interpretation by individual agencies. While some behaviors may appear as leadership actions in one context, they appear as political behaviors in another. Ferris and colleagues have established the utility of POPS in explaining increasing anxiety at workplace, reduced job satisfaction, turnover intent, and increased stress at workplace (*e.g.*, Cropanzano, Howes, Grandey, & Toth, 1997; Ferris & Kacmar, 1992; Ferris, Perrewé, Anthony, & Gilmore, 2000; Ferris, Russ, & Fendt, 1989). Among the organizational factor influencers of POPS, nature of the job, advancement opportunities, and interactions with coworkers and supervisors are prominent (Ferris & Kacmar, 1992; Ferris, Bhawuk, Fedor, & Judge, 1995; Valle & Perrewé, 2000). These are conjectured to work via leader-member exchanges resulting in differential evaluations of work place (Davis & Gardner, 2004). The overall context within the organization thus becomes a potent determinant driven largely by previous conditions at work, interactions between actor and perceiver. Despite Davis and Gardener's (2004) call for understanding of process of development of cynicism has not received due attention in management literature.

The extant literature is silent on what comes first – is it the politics that influences cynicism or whether cynicism against organization's ways and means, change efforts, and management practices results in a heightened perception of organizational politics. While it is difficult to deny that POPS and cynicism would be related, it is also important to know what would precede what. Lack of clarity here precludes any attempt to correct these in the workplace.

If one were to assume that a running organization will have such difficulties, and it would be worth the while to correct them, it would be better to take an approach that promotes work, change efforts, reduces POPS, and increases satisfaction with the conditions. Moreover, POPS is largely an environmental variable that gets interpreted or made as per choices and actions of individuals. Thus, individual remains the agency where primary attitudes would result in evaluations of the environment. Theoretically, cynicism is closer to being an attitude, hence it is argued that cynicism of people would influence POPS in the organization. Logically, higher the cynicism, higher POPS should be reported. It is therefore hypothesized that:

H1: Organizational cynicism will have an impact on perception of organizational politics.

Role of Empowerment

Empowerment of employees comprises of improvement of their confidence levels, providing opportunities for growth and autonomy to make choices especially about how the work should be done (Fernandez & Moldogaziev, 2012). It also results in reduced POPS via increased employee autonomy, opportunities to grow on the job, and improvements in self-confidence of employees (Valle & Perrewé, 2000; Vredenburg & Maurer, 1984). A large body of practitioner literature (in turn based on empirical findings) has presented arguments in favor of giving extra freedom, developing a deeper understanding of the organization, improving self-belief of team members, being fair to employees/team-members in the interaction – somehow improve internal commitment. It has also been identified to be “an endless journey” (Randolph, 2000: 99) that takes time to achieve. More recently empowering leadership actions have been linked to improved creativity and draw superior sustained performance from employees, who are more positive towards future outlook; *i.e.*, are not cynical towards change (Zhang & Bartol, 2010). Interestingly empowerment climate has been found to be conceptually distinct from psychological empowerment, as it predicts superior work-unit performance at the unit level (Seibert, Silver, & Randolph, 2004).

Empowered employees in knowledge industry (IT and marketing) have been labeled to be source of inspiration for others in the organization because of their superior performance in understanding customer needs, application of technology to solve issues, and maintain standards of operation (Bernoff & Schadler, 2010). Empowerment is also found useful in creating stronger teams, improved information sharing, and providing clarity; that together work at alleviating perceptions of (bad) organizational politics (Ji-Eun, 2012), promote innovation (Fernandez & Moldogaziev, 2012); and result in higher satisfaction with the workplace (Goffee & Jones, 2013). Empowerment of subordinates has been found to be an important leadership skill in Indian context. Such leaders were able to keep the organization on track for performance and create critical mass to drive organizational change (Cappelli, Singh, Singh, & Useem, 2010).

A climate of empowerment therefore will reinforce supportive conditions. If organizations resort to empowering their employees, cynicism arising out of non supportive leadership, uncared for personnel would go down. This in turn should bring down POPS. Thus, it is argued that empowerment would negatively influence cynicism that should in turn bring down POPS in the organization.

H2: Empowerment will be negatively related to organizational cynicism.

Interpersonal interactions

A good quality interaction is a must for alleviating fears of negativity in the organization. Mere presence of empowerment policies and practices will not yield fruit unless interpersonal interactions also reinforce the relationship. It is argued that to bring in the practice of empowerment, the quality of interaction must go up. The interactional component is also helpful in creating an environment of trustworthiness and contribute towards building perceptions of justice. It has been found that if employees perceive interactions with superior to be reinforcing dignity, concern and respect they report far less retaliation and lesser negative citizenship behaviors (Cropanzano, Prehar, & Chen, 2002; Jones, 2007; Roch & Shanock, 2006; Sakrilicki & Folger, 1997). If the superior interacts in a just manner it would also make the subordinate see the good points and also enable her to improve on shortcomings. Such enabling interaction is therefore likely to improve self-efficacy belief (Bandura, 1988). Together these would weaken the linkage between cynicism of an individual and the POPS. Thus it can be hypothesized that:

H3: *Quality of interpersonal interaction will moderate the relationship between organizational cynicism and perception of organizational politics.*

Outcome variables

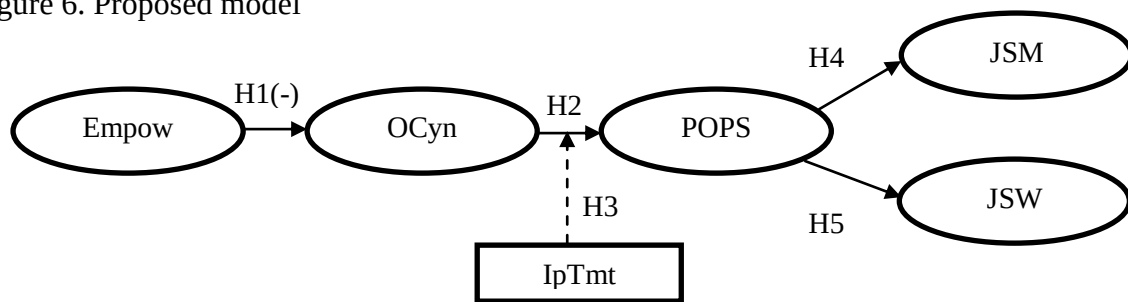
If the above hypotheses were true, empowered employees would report lower POPS, and higher satisfaction. This satisfaction will also be an indicator of their satisfaction with work, good quality interpersonal interactions with their managers. Job satisfaction with work and manager will therefore be tested with the following hypotheses:

H4: *Empowerment would result in lower cynicism, POPS, and higher job satisfaction with manager.*

H5: *Empowerment would result in lower cynicism, POPS, and higher job satisfaction with work.*

Proposed model is shown in Figure 1.

Figure 6. Proposed model



Data and Analysis

Due to its environmental nature, it is difficult to isolate POPS statistically after the data has been collected. The best control could be had only at the design stage. It was decided to focus on one large department of a very large IT services organization (>150,000 employees) to control for effects of organizational context,. Care was taken to collect data from multiple geographic locations within India from within the same department. This allowed controlling for unit level factors that could influence the context (Denison, Haaland, & Goelzer, 2003). Administration of questionnaires was done through a web based interface to minimize human influence in sensitive matters such as POPS and cynicism. The introduction mail about neutrality and confidentiality was given by the head of the department. This also allowed the exercise to be seen as a legitimate attempt to understand the organization. Standardized questionnaires for the scales were while items were randomized in the questionnaire. A total of 340 responses were collected from nine difference locations. The sample was spread across five different management bands that could be combined to form two levels – superiors and subordinates. Out of 340, 86 employees were manager or above (minimum 12 years of work experience). The remaining 254 had at least 16 years of formal education with at least four years of tenure in the organization that made them well-versed with the culture and intricacies of the organizational life. 11.9% respondents were female which is slightly higher than average Indian workplace, but representative of IT industry employment rates in India (Budhwar, Saini, & Bhatnagar, 2005). Average age of a respondent was 31.8 years.

Scales were checked for factor structure and reliability. Table 1 presents the details. Confirmatory factor analysis was used to check if the structure of the scales. Common method variance was statistically checked using methods outlined in Bande-Vilela, Fernandez-Ferrin, Varela-Gonzalez, and Salas (2012), Krosgaard & Roberson (1995), and Podsakoff, Mackenzie, Podsakoff, & Lee (2003).

Table 1. Scale reliability

Construct	Scale	Cronbach's alpha
Empowerment	Denison et al., 2003	.723
Organization Cynicism	Wanous, Reicher, & Austin, 2000	.839
Perception of org politics	Ferris & Kacmar, 1992	.685
Job satisfaction with work	Smith et al., 1969, modified by Roznowski, 1989	.841
Job satisfaction with manager		.900
Interpersonal treatment	Donovan, Drasgow & Munson, 1998	.911

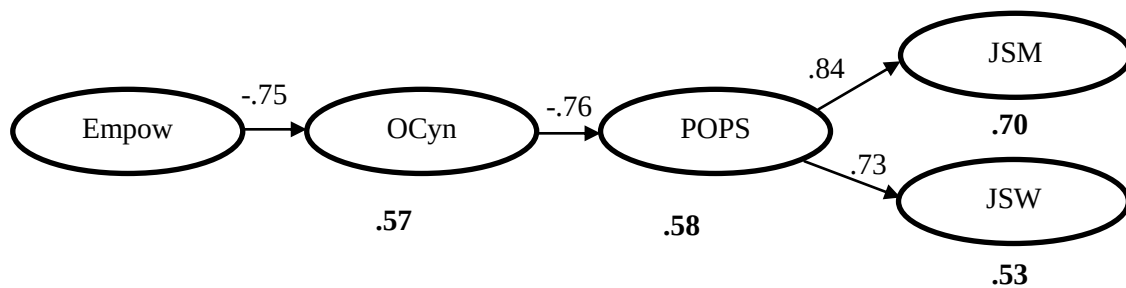
Structural Equation Modeling was performed on the model using AMOS 21 alongwith SPSS 21. Measurement model was tested first followed by the structural model. The following were the results for measurement model and structural model respectively -
 $\chi^2 = 328.684$; d.f. = 170; $p < 0.01$; $\chi^2/df = 1.933$; RMSEA=0.052; GFI=0.920; TLI = 0.945;

CFI = 0.955; IFI = 0.956.

$\chi^2 = 456.059$; d.f. = 176; $p < 0.01$; $\chi^2/\text{df} = 1.46$; RMSEA=0.069; GFI=0.892; TLI = 0.906; CFI = 0.921; IFI = 0.922

They indicate a good fit for the model to be accepted (Byrne, 2010, Hair, Black, Babin, & Anderson, 2010) Structural estimates along with squared multiple correlations are shown in figure 2. All squared multiple correlations were significant at $p < .01$. Thus Hypotheses 1 and 2 were supported, i.e. cynicism does have an effect on POPS, and empowerment seems to reduce cynicism. With this finding one of the untested propositions and the main premise in Davis and Gardner (2004) also stands tested.

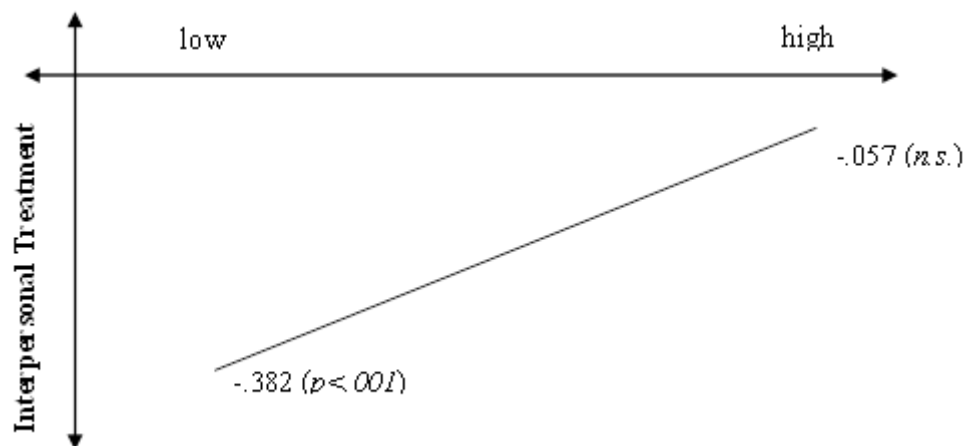
Figure 7. Structural estimates, regression weights and square correlations (larger)



Test of Moderation

Two groups were made in the data set named – low and high. Median score on interpersonal treatment and empowerment was chosen as the divider. This has been identified as a stricter test for moderation compared to ± 1 s.d. from mean (Bande-Vilela et al., 2012). Multigroup analysis process was used in SEM to test for moderation effects. On pairwise parameter comparisons *z-score* and *chi-square* differences were significant for one degree of freedom – indicating a strong moderating influence. Effect size changed from -0.382 ($p < .001$) to -0.057 (*ns*), thereby supporting hypothesis 3. Figure 3 depicts the moderating effect.

Figure 8. Moderating influence of interpersonal treatment



Estimates for job satisfaction, however, were different. Higher job satisfaction with manager

was reported by people in better interpersonal interactions. Job satisfaction with work surprisingly reduced for better interpersonal treatment and higher empowerment. The data therefore supported H4 but not H5. Table 2 gives the values. All values are significant at $p < .001$.

Table 2. Standardized regression weights

	Interaction	
	Low (N=165)	High (N=175)
JS – Work	.732	.480
JS-Mgr	.179	.519

Discussion and implications for practice

The study presents a working model for tackling the problem of cynicism in organizations, while advancing theoretical understanding of the organizations a little bit further. It seems prevalent cynicism does have an impact on POPS in the organization. The nature of cynicism is such that once the environment is perceived to be negative, it will fuel cynicism further by giving rise to illegitimate political behaviors that flout the accepted norms of the game. There is more evidence in favor of good interpersonal interaction and empowering people because they seem to alleviate the cynicism that would exist in the organization against change. For practice, this is good news because empowering cultures, and faith in leadership is here to stay. It also points toward thoughtfulness needed on part of the leader before he or she gives feedback while trying to develop skills/empower subordinates. A word of caution could be useful here. Earlier research in Indian context had indicated that Indian leaders are not comfortable giving or receiving negative feedback (Gupta & Virmani, 1991). It may be useful to interact in a manner that maintains dignity, independence and future oriented action for the subordinate. This could also be the key for higher job satisfaction with manager.

Satisfaction with manager is largely dependent on empowerment provided and good interpersonal interaction with the subordinate. It is also clear now that empowerment and good interpersonal treatment are expectations amongst knowledge workers. The organizations in such industries have to work towards creating systems that empower people. Mere lip service or policy making may not be helpful. Strong visible action may be necessary. In current regime of 360-degree feedback to leaders, there is strong, direct, and fruitful outcome if a manager engages in good leadership tenets with her subordinates.

The negative relationship between cynicism and POPS was quite intriguing. It highlighted our assumption throughout that politics is bad, and that it is something that we could do away with. There seems to be an indication that in knowledge industry or modern industries with knowledge workers where people have been working for a longer number of years, it seems that employees are comfortable with the idea that politics is going to stay. This essentially begs the question - are our notions of politics of being neutral, good enough? In modern organizations, it seems to be moving towards an accepted norm in order to garner resources. . It seems clearly that while model is statistically and conceptually sound, theory development to suit the changing context needs to be gather pace. While the current insights are quite useful, they ought to be tested further in larger context.

Limitations

While context had been tightly controlled for this data set, it may also be the biggest limitation. The sample comprised of employees who were very well versed with the organization and had been working together for a long period of time. This could have resulted in learned patterns about working of the system and superior. In such a scenario the relationship could observe a heightened influence in either direction. It may be a better idea to look at more data sets from different organizational contexts.

Second big limitation could be our existing theory and understanding of phenomena itself. Politics is largely believed to be negative in our literature. However, professionals/practitioners may have a surprise in store for us. The organizational context in some manner puts demands on people that they are “smart” – meaning they are able to garner resources, use organizational policies, teams, and other paraphernalia to their advantage, persuade, impress, get their work done – all in order to be successful. Since statistical techniques have advanced quite a lot, it may be a good idea to explore the model further. Process studies could reveal new insights into how these constructs work on the ground. Thus the paradigm of this study could be another limitation. It may therefore be very useful to explore these relationships further in post-hoc fashion, and use mixed methods to arrive at somewhat more informed conclusion.

Conclusion

Politics does influence cynicism in organization. It may be a good idea for managers to watch how they interact with their subordinates. Empowerment of people could be a necessary to be demonstrated. For an exploration, we have some idea of how this is working on the ground, but it also seems too early for academics to catch up with ground reality – at least in the field of cynicism and politics.

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Chapter 9: Methodology, Measurement, and Consulting Practice

Does the Likert scale fit the information age?

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Abstract

The purpose of this study is to compare the effect of using different measurement scales to identify attitude change caused by an intervention, by applying two types of attitude measurement scales. One is the 7 point Likert scale, and the other is the PolliMeter color scale yielding a 0 to 100 continuous scale.

There were 500 respondents. The sample was randomly divided into two groups: 250 received the Likert questionnaire and 250 received the PolliMeter questionnaire.

While the attitudes change measured by the two scales were in the same direction, the PolliMeter scale measured a much higher attitude change compared to the Likert scale. The results showed that the PolliMeter scale was able to improve the prediction of the attitude change by 2-3 times the prediction done by the Likert scale.

Introduction

Measurement scales and the study purpose

Measurement scales are used to categorize and/or quantify variables. Statisticians have grouped data collected from questionnaires into four levels of measurement:

1. Nominal scale: The weakest level of measurement representing categories without numerical representation.
2. Ordinal scale: Data in which an ordering or ranking of responses is possible but no measure of distance is possible.
3. Interval scale: Generally integer data in which ordering and distance measurement are possible.
4. Ratio scale: Data in which meaningful ordering, distance and fractions between variables are possible, and there is an absolute zero.

Data analyses using nominal, interval and ratio data are generally straightforward and transparent. Analyses of ordinal data, particularly as it relates to Likert or other rating scales in surveys, are not. However, the ordinal scale is the most commonly used in social sciences research, using frequently the Likert scale.

The adequacy of treating ordinal data as interval data continues to be controversial in survey analyses in a variety of applied fields. Although Likert-scale data can be analyzed by nonparametric procedures, applying parametric procedures to Likert-scale data analysis is still commonly adopted by researchers in social sciences. Yet, the application of parametric procedures to data analysis requires that the data set concerned should conform to some statistical assumptions which are not fulfilled by the Likert scale (Wu, 2007).

Responses to Likert scales are also subject to cultural differences. These differences were identified and researched by Lee, Jones, Mineyama, & Zhang (2002) and were divided into 5 categories: (a) Members of some cultural groups might report more difficulty in responding to the range of choices in a Likert scale or leave more questions unanswered. (b) While in some cultural groups might be more likely to provide answers outside the range of responses included in a Likert scale. (c) Members of some cultures might be less willing to select extreme responses. (d) Scores from Likert scales might be less reliable in some cultures. (e)

Theoretically posited relationships among variables measured by Likert scales might show different patterns of association across cultures. In other words, the construct validity of a Likert-measured variable might be restricted to specific cultures.

New measurement scales were developed in the recent years using new technologies that do not have the shortcomings of the Likert scale. One of them is PolliMeter which is an interval scale without cultural differences.

A comparison of two methods of measurement is quite common in research. For example, a research of visual analogue vs. Likert scale was performed and found that males and females, as well as subjects of different ages, responded to the two scales in different ways (Brunier, 1996).

The purpose of this study is to compare the effect of using different measurement scales to identify attitude change caused by an intervention, by applying two types of attitude measurement scales. One is the 7 point Likert scale, and the other is the PolliMeter color scale yielding a 0 to 100 continuous scale.

Measuring attitudes change

Attitudes are the core of social psychology and a pervasive concept throughout the social sciences. Attitudes commonly refer to people's evaluations of a wide variety of objects, issues, and people, including the self. Attitudes are assumed to have an evaluative component (Petty, Brinol and DeMarree, 2007). An attitude can be associated with both positive and negative evaluations. Attitude strength is the extent to which attitudes are durable (persist over time and resist change) and impactful (affect other judgments and behavior).

In many social sciences studies there is a need to assess the effect of an intervention on a population's attitude change. This is done by measuring attitudes before and after the intervention. Quite often the analysis yields non-significant results. This raises the question whether the intervention really did not have any impact, or was the measurement too crude to detect a change.

Likert scale

The most commonly used scale for attitude measurement is the Likert scale. The Likert scale was developed in 1932 as the familiar five-point bipolar response. These scales range from a group of categories from least to most, asking people to indicate how much they agree or disagree, approve or disapprove, or believe to be true or false. The answer scale has usually a 5 or 7 point answering scale. Scales are sometimes truncated to an even number of categories to eliminate the "neutral" option in a "forced choice" survey scale (Allen and Seaman, 2007). In any case, data derived from Likert scales are ordinal scales; therefore data analysis is rather limited. Nonetheless, for comparison purposes it is fairly common to treat Likert scale as if it is an interval scale.

PolliMeter scale

The PolliMeter is an innovative measurement method for obtaining information from respondents about their opinions, attitudes, intentions, feelings, emotions etc. PolliMeter is a dynamic and interactive method which permits one to examine respondents' reactions to stimuli, through questions or statements, using computerized and communication devices via the Internet, Intranet, as well as on stand-alone computerized devices.

The use of PolliMeter is very simple and can be easily operated even by young children. The method is flexible and can be modified and supplemented with images, logos, cartoons figures, filmed promos, etc.

The respondent indicates his/her reaction to a certain statement or question, with or without additional stimuli, by moving one's position on a colored bar divided equally between two colored areas: One representing one type of reaction e.g. agreement, and the other, representing another type of reaction e.g. disagreement. The answer is indicated by expanding or by narrowing one of the colored areas which causes the proportion between the agreement and disagreement zones to vary.

The PolliMeter method has two unique features: It separates between the respondent's reaction to a stimulus presentation which consists of an unnumbered analog scale using color proportions, and the numerical scale provided to the researcher (not seen by the respondent), representing an interval scale based on the color proportions that were chosen. The second feature is that it provides a complete trace of the reaction process. Thus, the PolliMeter method allows the researcher to follow the complete trace of the respondent's reactions from exposure and until the final response is made. The fact that the PolliMeter includes both features provides more accurate and enables more in-depth analyses of respondents' reactions. Since the Pollimeter provides a complete trace of the response process, we strongly believe that the rich information regarding the answering process is one of the most important added values offered by the PolliMeter, which is not available today in any existing method. Thus, we argue that some of these process measures could help in bridging the gap that often exists between the measured response and the real actual feeling of the respondents.

The psychological literature has emphasized that the common measurement of one's attitude does not necessarily gives us the whole picture; thus, it is also necessary to include measures of attitude strength before drawing any conclusions (Fazio et al., 2000). Although there is no clear conceptual definition of this construct, researchers concur that *strong* attitudes have important behavioral consequences (Pomerantz et al., 1995; Van Birgelen et al., 2001): i.e. strong attitudes are more resistant to change, are more persistent over time, are more predictive of behavior, and may lead to selective information processing (e.g., Abelson, 1988; Chaikan et al., 1995; Olson & Zanna, 1993).

Several different indicators of attitude strength have been suggested in the literature. Usually, most of these indicators are operationalized as self-report measures (e.g., Pomerantz et al., 1995; Van Birgelen et al., 2001) also termed as *meta-attitudinal* measures of strength that are based on respondents' reflections of their attitudes (Bassili, 1996). However, these types of measures suffer from several serious limitations, such as: It depends on stored information that is not necessarily available or accessible for scrutiny (Bassili, 1996). As a result, it is subjective and prone to biases (such as social desirability concerns), or to contextual influences (Bassili, 1996), and therefore may not serve as a reliable and valid measures of strength.

There is a second category of strength measures that focuses on *implicit-operative* indicators. Operative measures are defined as indicators of judgment processes responsible for attitude responses (Bassili, 1996). They are implicit in the sense that they are estimated indirectly, without the respondent's awareness as to what variable is actually being measured (Fazio & Olson, 2003). There are relatively few measures of attitude strength belonging to this second category that are widely accepted or applied (Bassili, 1996; Krosnick et al., 1993).

Market and product research are widely employed around the world in an effort to gain insight into customer opinions, understanding emerging customer needs, determining market attitudes, revealing competitor intentions, and preparing for new product launches. The practice of market research is deemed as an embedded process in most business enterprises, where business intelligence and market data are perceived to be the foundations of strategy formation. Although many empirical studies have addressed practical issues such as voting intentions (e.g. Bassili, 1993, using a CATI survey; Fazio & Williams, 1986), or simulations of consumer behaviors (e.g. Fazio et al., 1989), and although their results implied the usefulness of incorporating attitude strength measures in market and consumer research industries, those measures were rarely employed in practice.

Method

Subjects and Study Procedure

The comparative study topic chosen was regarding the attitudes towards consumption of multi-vitamins and minerals. The intervention consisted of exposing the subjects to a message citing a scientific research for or against the effectiveness of vitamin consumption. The respondents with positive attitudes were exposed to the negative message while those with more negative attitudes were exposed to the positive message. Then, after some distracting questions, the attitudes towards vitamin consumption were measured again.

The respondents were 500 Israelis that were randomly selected out of a list of about 10,000 registered people that were willing to answer Internet surveys. A monetary compensation was offered to the respondents. The sample was randomly divided to two groups: 250 received the Likert questionnaire and 250 received the PolliMeter questionnaire. Table 1 summarizes the study subjects according to the answer scale and the message. Out of the sample, 38 were screened out because they did not hear the narration (23) or because they filled in the questionnaire more than once (15). Because PolliMeter is a new scale 14 questionnaires were filled more than once by some respondents, as compared to only one for the Likert scale group.

Table 1. Study subjects that received the Likert/ PolliMeter scale and the positive/ negative message

	Original sample	Screened out-no narration	Screened out-multiple responses	Study sample	Positive message	Negative message
Likert sample	250	10	1	239	75 (31%)	164 (69%)
PolliMeter sample	250	13	14	223	61 (27%)	162 (73%)
Total sample	500	23	15	462	136 (29%)	326 (71%)

Sample Characteristics

Table 2 (next page) summarizes the sample characteristics of four sample subgroups.

Measures

The attitudes towards consumption of vitamins and minerals were measured by the following 4 items: To what extent do you agree that:

1. It is important to take vitamins and mineral tablets every day?
2. Taking vitamins and mineral tablets improves your health?
3. Taking vitamins and mineral tablets increases energy and vitality?
4. Taking vitamins and mineral tablets is a waste of money? (Reverse)

Table 2. Sample characteristics for Likert (N= 239) and for PolliMeter (N=223) groups

Variable	Answer Scale	Total Sample	Negative Message	Positive Message
Gender - % male	Likert	49%	46%	55%
	PolliMeter	53%	50%	61%
Age - Mean	Likert	38.1	38.0	38.2
	PolliMeter	37.6	38.0	36.4
Education level - Mean	Likert	3.23	3.22	3.27
	PolliMeter	3.21	3.17	3.30
Vitamin consumer %	Likert	29%	40%	7%
	PolliMeter	33%	43%	8%

The answer scale for the Likert group was the 7 point Likert scale ranging from 1=strongly disagree to 7=strongly agree.

The answer scale for the PolliMeter group was a continuous number ranging from 0=strongly disagree to 100=strongly agree.

For each attitude item the attitude change was calculated as the difference between the attitude before the intervention and the attitude after the intervention.

The additional variables are:

Vitamin consumption: 1=yes, 2=no.

Gender: 1=male, 2=female.

Age range: 1= 18-24, 2=25-34, 3=35-44, 4=45-54, 5=55-64, 6=65+. Age was converted to the average point of each range with 70 for the 65+.

Data Analysis

The data analysis was done separately for each one of the four groups: Likert group with the negative and positive message and PolliMeter group with the negative and positive message. Means and frequencies of the attitudes change were analyzed. A stepwise multiple linear regression analysis was conducted for the attitude change variable.

Results

Firstly, we analyzed the attitudes change of the 4 attitude items and the attitude change variable that is composed of these 4 items. In order to present the data in a comparable scale we converted the Likert scale 1-7 to a corresponding 0-100 scale, which is the PolliMeter scale range.

The data analysis was done separately for each one of the four groups: Likert group with the negative and positive message and PolliMeter group with the negative and positive message. Means and frequencies of the attitude change were analyzed. In order to compare the Likert scale with the PolliMeter scale, the "No change" for the PolliMeter scale was 50 (the mid-point) plus/minus half of the minimal change as measured by the Likert scale.

The results for the negative message group are presented in Table 3, and for the positive message in Table 4.

While the attitudes change measured by the two scales were in the same direction, the PolliMeter scale measured a much higher attitude change compared to the Likert scale (29% for the negative message group and 65% for the positive message group, referring to the attitude change variable). Moreover, results showed that even one item using the PolliMeter scale was sufficient to indicate attitude change, while at least 4 items of the Likert scale were required to indicate about the same attitude change.

Table 3. Means and frequencies of the attitude change (attitude before minus attitude after) of the vitamin attitude variable and its 4 individual items of the negative message group

	Answer scale	N size	Mean	Unexpected direction change	No change	Expected direction change
<i>Attitude change variable (4 items)</i>	Likert	164 (239)	12.88	9.8%	30.5%	59.8%
	PolliMeter Final answer	162 (223)	16.63	12.3%	15.5%	72.2%
Importance item change	Likert	164 (239)	10.98	6.7%	55.5%	37.8%
	PolliMeter Final answer	162 (223)	17.49	19.8%	21.6%	58.6%
Health item change	Likert	164 (239)	14.84	3.7%	51.8%	44.5%
	PolliMeter Final answer	162 (223)	18.50	10.5%	19.7%	69.8%
Energy item change	Likert	164 (239)	12.70	6.7%	50.0%	43.3%
	PolliMeter Final answer	162 (223)	16.63	11.1%	23.5%	65.4%
Money waste item change (reverse)	Likert	164 (239)	12.20	9.1%	45.7%	45.1%
	PolliMeter Final answer	162 (223)	13.90	18.5%	23.5%	58.0%

Table 4. Means and frequencies of the attitude change (attitude before minus attitude after) of the vitamin attitude variable and its 4 individual items of the positive message group

	Answer scale	N size	Mean	Expected direction change	No change	Unexpected direction change
<i>Attitude change variable (4 items)</i>	Likert	75 (239)	-4.13	46.7%	22.7%	30.7%
	PolliMeter Final answer	61 (223)	-6.82	50.8%	16.4%	32.8%
Importance item change	Likert	75 (239)	-14.67	45.3%	45.3%	9.3%
	PolliMeter Final answer	61 (223)	-18.38	57.4%	22.9%	19.7%
Health item change	Likert	75 (239)	-2.00	26.7%	54.7%	18.7%
	PolliMeter Final answer	61 (223)	-3.43	32.8%	19.7%	47.5%
Energy item change	Likert	75 (239)	-0.89	29.3%	52.0%	18.7%
	PolliMeter Final answer	61 (223)	-6.51	39.3%	26.3%	34.4%
Money waste item change (reverse)	Likert	75 (239)	-0.45	21.3%	60.0%	18.7%
	PolliMeter Final answer	61 (223)	1.03	32.8%	26.2%	41.0%

Stepwise multiple linear regression analyses were conducted for the attitude change variable and are presented in Tables 5 and 6. A prediction of the attitudes change used the following independent variables: attitude before, vitamin consumption (yes or no), age, and gender. The R Square obtained for the negative message intervention was 0.06 for the Likert measurement

and 0.19 for the PolliMeter measurement, and for the positive message intervention: 0.07 and 0.14, respectively. The results showed that the PolliMeter scale was able to improve the prediction of the attitude change by 2-3 times the prediction done by the Likert scale.

For the negative message group: the attitude change was positive for most respondents. The attitude change was greater for the respondents that does not consume vitamins, and for more positive initial attitudes towards vitamins and minerals. For the PolliMeter scale group, also age was found significant. Though the change in attitudes was smaller for older respondents.

Table 5. Results of the stepwise multiple linear regression on the attitude change (attitude before minus attitude after) of the negative message group

Answer scale	N size	R ²	Vitamin consumer	Attitude before	age
Likert	164 (239)	.058	.274 (p=.003)	.201 (p=.026)	
PolliMeter Final answer	162 (223)	.186	.366 (p<.001)	.334 (p<.001)	-.220 (p=.003)

Table 6. Results of the stepwise multiple linear regression on the attitude change (attitude before minus attitude after) of the positive message group

Answer scale	N size	R ²	Vitamin consumer	age	gender
Likert	75 (239)	.072	.268 (p=.020)		
PolliMeter Final answer	61 (223)	.140		.310 (p=.014)	-.245 (p=.050)

Discussion

The purpose of this study is to compare the effect of an intervention, by applying two types of attitude measurement scales. One is the commonly used 7 point Likert scale, while the other is the PolliMeter color scale yielding a 0 to 100 continuous scale.

The comparative study topic chosen was regarding the attitudes towards consumption of multi-vitamins and minerals. The intervention was exposing the subjects to a message citing a scientific research for or against the effectiveness of vitamin consumption. The respondents with positive attitudes were exposed to the negative message while those with more negative attitudes were exposed to the positive message. Then, after some distracting questions, the attitudes towards vitamin consumption were measured again.

The study is based on a sample of 500 respondents, randomly divided into two groups of 250 respondents, each having the same characteristics. One group was measured via the Likert scale, while the other group was measured via the PolliMeter.

While the attitudes change measured by the two scales were in the same direction, the Likert scale measured a much lower attitude change compared to the PolliMeter scale. Moreover, results showed that even one item using the PolliMeter scale was sufficient to indicate attitude change, while at least 4 items of the Likert scale were required to indicate about the same attitude change.

A prediction of the attitudes change used the following independent variables: attitude before, vitamin consumption (yes or no), age, and gender. The R Square obtained for the negative message intervention was 0.06 for the Likert measurement and 0.19 for the PolliMeter measurement, and for the positive message intervention: 0.07 and 0.14, respectively. The results showed that the PolliMeter scale was able to improve the prediction of the attitude change by 2-3 times the prediction done by the Likert scale.

To sum up, measurement of the effect of an intervention on subjects' attitudes depends not only whether or not a real change took place, but also on the quality and the sensitivity of the attitude scale used in measuring it.

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Organizational consulting as a dialogic practice: The Interação Jr IP/UERJ Experience as a new model of action

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Abstract

The acting field in organizational consulting, especially in people management has been requiring new ways of conception and acting, facing how complex and changing the social reality is. Taking this context into account, this paper proposes a debate on an interface experience linking “academy – workplace” through an experience report of “Projeto de Extensão Psicologia do Trabalho e Organizacional - ênfase nos processos organizacionais”, that is, an extension project of labor and organizational psychology – emphasis on organizational processes, more specifically, when describing its model of organizational consulting. This Extension Project aims at the systematization and supervision of the “Empresa Junior” (a junior company, or EJR) from the psychology institute. The experience from the EJR in organizational consulting takes Labor and Organizational psychology, and Social Psychology as its theoretical standpoint in a integrated and interdependent view of the organization, the social relations and work.

The methodological referential that was adopted, that is, “Metodologia Psicossocial Integrada” (Integrated Psychosocial Methodology) puts emphasis on the complex thought perspective of Edgar Morin, being based on the theoretical studies made about group processes and action-research. Therefore a process that aims at emphasizing the construction of a partnership between researcher and social actors, creating a free dialog zone and freedom of speech, searching for a broad analysis of the social context and the involved demands. In this sense, the following phases appear: 1st phase: Initial – discussion of demand – researcher and participants – work and psychological first contract; 2nd: Combined mapping of the situation: - Data collection - interviews and specific questionnaires; 3rd: Data analysis; 4th: feedback – presentation and return of data – review of the psychological and labor contract - Creating an action proposal; 5th Putting the proposal into action; 6th evaluation and follow up of the action proposal by all the participants, with the intention to create individual and collective action plans. This proposal made by the EJR, be it outside in the consulting projects or inside, in the management of the company itself, has become an opportunity for continuous learning, personal and professional development of all the individuals involved. In this sense, this experience has helped reinforce the construction of partnerships (university and work market) in pursuit of reviewing the organizational practices and the collective actions, creating new acting models and contributing to fulfill the demand for changes in the people management area.

Introduction

Taking into account how complex and mutable the social reality is nowadays, several studies have been developed in Social Psychology in the last years, contemplating reflections and proposals for change in the field of Labor and Organizational Psychology. Those matters concern especially the boundaries of this field of knowledge and practice, the role of a psychologist in those organizations and how important it is to have a prepared professional.

Zanelli (2005) shows that the changes happening in the contemporary world have been creating an impact in the social and individual dimensions and, consequently, the work environment also has been changing.

Recent changes, such as the prevalence of the stock market over the industry, the information technology, internationalization process of Organizations, appraisal of intellectual capital, appreciation of sustainable development and social development, among others, are subjects that have been discussed and visited by several professional and knowledge fields. Morin (2006) defends that knowledge should not be faced as something fragmented, isolated from “contexto, antecedentes e devenir”, that is, from context, background and future consequences (page 7). And so this contemporary scenery, which is, according to Morin's definition in the 60's (MORIN, 2006), so complex, has been calling those who work and theorize about the work environment and its organizations to face new challenges and scenarios. In this sense, the field of Labor and Organizational Psychology could not stay out of this booming, as it was said by Zanelli (2005) when converging with those ideas, declaring that “assim como qualquer prática social, esta não fica imune às transformações do contexto e ao desenvolvimento da ciência. No cenário do início do século XXI [...] a amplitude e o escopo da sua atuação têm sido efetivamente alargados” (p. 478), that is, ‘as with any social practice, this one is not immune to the context and science development transformations. In this scenario of the beginning of the 21st century [...] the dimension and scope of its acting has been widely broadened’. And consequently the field of acting in organizational consulting, specially in people management, has been requiring new forms of conception and acting. Therefore the academy becomes an important institution. Not only for graduating, but to raise reflections and create innovative practices, that should be able to break the existing paradigms. Taking this context into account, this paper was created with the intention of creating a debate on the interface experience between the academy and labor market using the feedback from “Projeto de Extensão Psicologia do Trabalho e Organizacional - ênfase nos processos organizacionais”, that is, the extension project of Labor and Organizational psychology - focused on organizational projects, and more specifically, using a model of organizational consulting that has been constructed and used by the technical team of the project. This extension project has as one of its goals the systematization and supervision of the functioning of the Junior Company (EJr) of the Institute of Psychology from UERJ when trying to empower the students, as well as reviewing the organization fields, identifying new acting possibilities for a Psychologist in this field. That being said, its proposal is to create a theoretical - practical elaboration space for a social lab that allows an innovative way of acting, conducted by new reflections in this field, in a continuous motion, and that help strength the University's mission of teaching, research and extension.

Psychosocial Integrated Methodology - fundamentals for acting

The Extension Program: Labor and Organizational Psychology emphasis on organizational processes: Guiding the working of the EJr of the Institute of Psychology from UERJ is based on and oriented by the theoretical foundations of the Labor and Organizational Psychology (Davel & Vasconcelos, 1995; Ayres, 2003; Zanelli, et al., 2005; Zanelli & Silva, 2008) and the Social Psychology, in a complex, integrated and interdependent point of view (Morin, 2006) of the organization, the social relations and labor. Its methodological foundation is made using the Psychosocial Integrated Methodology (Ayres, 2012), which takes Morin's (2006) complex thinking as its philosophical foundation and the theoretical studies about group processes (Mailhiot, 1985; Lane, 1989; Ayres, 2012) and the research-action (Barbier, 1985; Thiollent, 1997, 2004; El Andaloussi, 2004) as its pillar. This methodological conception is

used so as to integrate and articulate different referential, trying to develop methodology in the psychosocial scope, using a participative perspective (Ayres, 2012).

From this point of view, the Integrated Psychosocial Methodology is lined as a psychological field search, which is concerned with a psychosocial change. Therefore, this change is characterized by the close association to the solution for a group problem, by the effective communion of researches and social actors in a cooperative group process, so as to achieve the expected results by all the involved parties. That being said, the following methodological conditions were used to guide all the process of organizational consulting (Ayres, 2012):

- Psychological Contract - Moment in which the expectations, individual perceptions and different interest of each member and the group as a whole are expressed. The psychological contract is the foundation of the interpersonal, intragroup and intergroup relationship, having a dynamic feature. And because of this feature, it must be revisited along the development of the research
- Communication - there is compromise with the “argumentative process”, so freedom of speech is used when trying to understand the “unsaid”. Everybody is invited to express their ideas and opinion, which tends to enrich the participation of each member in the final results, using means that help the individual and group’s expression.
- Feedback Process - Deals with self reflection and exchange of perceptions (dialogue exercise) among group member in a transparent context. The goal is to check the obtained information in group situations, when agreements and disagreements happen among the different involved actors.
- Collective decisions - the decisions are taken taking into account the sharing of knowledge and experience. This premise is based on a non authoritarian, democratic view of the work, interpersonal and group relations. Interaction and the pursuit of collective autonomy when making decisions are valued.

In that sense, the collective construction becomes the focus. that is, everybody who is involved in the process participating, acting, giving information, interpreting, giving opinions, in a shared process of feedback and dialog, which focuses on auto and hetero evaluation. This construction will demand, then, that all the parts have a lead and supporting role. And then, in this process of building a partnership between consultant/researcher and social actors, everybody can play the lead role.

Based on the foundations of Psychosocial Integrated Methodology (Ayres, 2012), the technical team was able to build an “Integrated Model for Evaluation, Follow up and Development of People”, (Ayres, et al., 2009), key element to conduct the actions of the concerned Project. The role of the “Integrated Model” is to follow the professionals systematically for as long as they are part of the organization. It is a process of following the functional/professional development of people.

The Integrated Method of Evaluation, Follow up and Development of People - tying theory and practice

The Integrated Method of Evaluation, Follow up and Development of People (Ayres et al, 2009) is a proposed approach for the practices in People Management, with the goal of providing the development of individuals, groups, organization and society, starting at an integrated process which aims in favoring the obtainment of information and knowledge that are adequate to the decision taking process of all the involved. Due to the theoretical-

methodological conceptions that justify this “way” of creating People Management practices, the Organization is, then, considered a psychosocial field, which is integrated and interdependent, seeking to build partnerships with the involved actors, focusing on follow the real demands of the professionals and the organization. Then, the following basic assumptions are considered fundamental for the Psychologist who will act in this field:

- Development and enhancement of the human being, in an integrated and focused on the quality of life.
- Establishment of dialog among all the individuals involved in the professional development and the implementation of a participative model in the people management practices, in a continuous process of information exchange and co-responsibility;
- A politics of recognizing and highlighting people, which enlightens the dialog among all the individuals involved in the development process of the collaborator.
- An effective performance management centered on feedbacks, taking into account quantitative and qualitative data in the evaluation and follow up process of the collaborators, with the aid of auto and hetero evaluation.
- Adoption of practical evaluation methods, verifying how valid the procedures are and assisting in improvement actions or adaptations that are proven necessary

Summing up, the Integrated Model focuses on construction actions that are focused on the development and enhancement of the human being, the participation, quality of life and well being of people in an integrating concept, which takes the human being into account on their physical, psychic and social dimensions; and the organizations as a psychosocial phenomenon, a realm of subjectivity. What is usually called “Human Resources” is then considered a systemic and integrated vision (Morin, 2006) by the Integrated Model perspective of the different practices from which it is made, configuring itself in a “With People Management”. Its implementation has the goal of developing a “model” inside the “With People Management”, which may reevaluate the current actions in the organizations. And therefore the proposal aims on building innovative practices, social development of the organization, its professionals and the community, also becoming a space for further formation and professional development of the Psychology students from UERJ.

It is worth saying that the word “model” should be understood as “a way”, instead of “the model”. When using this term, the goal is to show a scope of theoretical propositions and methodical guidelines that base a practice without, however, having the intention to go towards a theoretical or practical stiffness. That is, the Integrated Model is an action proposal, a “way of doing”, and, as all models, it needs to be constantly examined and revisited, based on its theoretical and methodological grounds. It is necessary that one focuses on the search of ideal guidelines for building practices that will benefit the human being.

The Integrated Model as a way of conducting the organizational consulting - a dialogical practice

Then the Integrated Method of Evaluation, Follow up and Development of people come up with a “method” of conducting consulting in this field, which tries to favor the construction of a grounded and therefore articulated practice following the methodological orientations: Psychological Contract, Communication, Feedback Process and Decisions, foundations of the Integrated Psychosocial Methodology. In that sense, the way of conducting the methodology intends to fulfill the theoretical grounds of the project in a wide and complex way, developing the practices of the “With People Management” field, starting a path that may introduce the

methodological orientations that are the foundation of this concept. The following path searches then to favor the dialogical practice between researchers and social actors:

1st phase: Beginning - discussion of demand - expliciting the perceptions, expectations and “desires” of all the social actors. Tools: Collective sessions. Emphasis on methodological orientation: Psychological Contract

2nd phase: Combined mapping of the situation: - Data collection. Tools: interviews and specific questionnaires. Emphasis on methodological orientation: Communication

3rd phase: Data analysis and feedback - presentation and return of data; Review the working and psychological contract; joint development of acting proposal. Tools: Collective sessions. Emphasis on methodological orientation: Psychological contract, feedback process and collective decisions.

4th phase: Creating an action proposal. Emphasis on methodological orientation: Psychological contract, Feedback process and collective decisions

5th phase: evaluation and follow up of the action proposal by all the participants, with the intention to create individual and collective action plans. Tools: Evaluation forms and collective sessions. Emphasis on methodological orientation: feedback process and Collective decisions

Applying the Integrated Model in consulting projects, according to this integrated perspective, considers each practice of the “With People Management” in a distinctive and interdependent way, in which they are related to and influence each other continuous and permanently.

An experience from the Junior Company (EJr) from UERJ: Applying the Integrated Model as an innovative practice

Since 2007, the InterAção Jr. built a long-lasting partnership with UERJ’s business incubator, starting with the accomplishment of consulting projects focused on Venturers’ Evaluation and Follow up. Because of this initial demand from the Incubators, InterAção Jr created a team consisting of junior businessmen and supervisors, so that, together with the Incubator, they could discuss the initial demand and transform it in a work proposal that would meet the real demand of the involved parts.

And then, based on the conception of the Integrated Model, the Consulting Proposal was created having as goals:

- Establishing a partnership with the Incubators so as to create a new phase of Psychological evaluation and Follow up of new entrepreneurs.
- Guide the entrance of the entrepreneur in the Incubator
- Provide a personal/professional development space for future entrepreneurs.

And then this proposal went through the following stages so as to happen, according to the Integrated Model:

1st stage: Building the profile of functional competences. This stage, foundation of the following stages, aims in gathering the functional performance indicators, based on the Labor analysis practice, defining: -work conditions; -duties and activities made; - the education, knowledge and experience that are necessary so as to work. And then this map can sustain the Evaluation, Follow up and Development actions of the collaborators who are part of the organization.

2nd stage: People seeking. On this second stage, the goal is to attract candidates/professionals who meet the specific requirements for the professional/functional tasks. In this consulting, the seeking was made by using an entrepreneur selection bid.

3rd stage: psychological evaluation. this stage aims at constructing a professional/functional prognosis of each candidate-entrepreneur to guide the Incubator technical team to which candidates are closer to their Functional Competence Profiles and support the process of Follow up and professional development.

4th stage: Results return. This stage comprises the presentation of the Psychological Evaluation based on the Functional competences Profile, in a Functional/professional performance prognosis, enabling the construction of an individual functional development.

5th stage: Follow up and Functional Development. This last stage aims at achieving the entrepreneur's functional follow up, in pursuit of a personal/professional development and a better use of each entrepreneur's abilities and powers through a hard working together with the Incubator, in a continuous feedback process.

The partnership between the EJR of Psychology from UERJ and the Incubator has been getting more solid, since both share similar values, as both value the professional/functional development of the involved individuals. This means that when a Business Incubator opens a bid, they are doing more than select projects: they are worried about who will take part in their teams. In that sense, more than selecting candidates through a Psychological Evaluation, the work that is being done is totally directed to the interpersonal and professional development of the Process

Final Thoughts

The Integrated Model is becoming a learning experience for the students and a possibility for organizations to live new practices in the "With People Management" field, facilitating the personal/professional development of each employee, and, consequently, the development of the organization as a whole. The option for an integrating methodology (MORIN, 2006), connecting, from different scientific knowledge in practice, therefore DIALOGIC. As Ayres (2012) says, when it comes to the Integrated psychosocial Methodology:

"In this sense, it represents the search for a change in paradigm, in which the human being is no longer seen as a resource, but if they become part of the organizations, owner of their work and of all the other dimensions in their life. Acting as a whole citizen, he feels committed to his and society's destiny. this conception means constructing spaces for dialog, and, consequently, the taking part of all the individuals in making decisions on the organizations, assuring them the freedom of speech and argument and conditions for the establishment of symmetrical relationships. Hence, all of them are recognized and recognize each other as important for the destiny of the organization: equality principles, respect to diversity and commitment with the group become present in all organizational practices (Ayres, 2012).

Finally, this experience has been strengthening the construction of partners (academic field and work market) in the search for reviewing organizational practices and collective actions, putting new acting models into practice and contributing to answer the demand for changes in People Management. Those changes reflect the search for higher acting field of Psychologists in organizations, in the constitution of a more critical, ethical and human Psychology and, therefore, emphasizing on a dialogic practice among all the involved in this organization, work and social relations field.

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Comparing SSA and factor analysis: The case of coping with stress

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Abstract

Coping strategies refers to behaviors that individual does in order to handle a stressful situation. The objective of the present study was to develop a theoretical definitional frame for the coping strategies domain, by means of facet theory.

Two basic facets were discovered: A. Modality of coping, with 3 elements: cognitive, emotional and instrumental; and B. Direction of coping with 3 elements: change, accepting and withdrawal. 554 employees of various organizations and positions were interviewed.

Factor analysis discovered one of the two facets, the direction facet, with three factors; it didn't realize the modality facet. SSA presents the total universe, with the two facets and their elements in a two dimensional solution.

Introduction

This study is part of wide research that examined coping with stress from an organizational perspective; especially it raises three key questions: (1) How should strategies for coping with stress be defined? (2) To what extent do individuals who differ in terms of their positive psychological capital implement different coping strategies? Psychological capital is an individual's positive psychological state of development and is characterized by optimism, hope, self-efficacy and resilience (Luthans, Youssef & Avolio, 2007, p. 3) and (3) What is the relationship between an individual's coping strategies and organizational results such as subjective well-being and performance at work? In the current study we focus on answering the first question.

Strategies of Coping with Stress

Coping strategies are basic categories used to classify how people cope, namely, how they actually react to stress. The most known classification (Lazarus & Folkman, 1984) identified two major process-oriented functions of coping strategies: *problem-focused coping* and *emotion-focused coping*. In respect to the problem-focused function, a person obtains information about what to do and mobilizes actions for the purpose of changing the reality of the troubled person-environment relationship. Emotion-focused coping is aimed at regulating the emotions tied to the stress situation, for example, by avoiding thinking about the threat or by reappraising it without changing the realities of the stressful situation (Lazarus, 1999). Both functions are essential parts of the total coping effort (Lazarus, 1999).

This classification of coping has provided a broad practical framework for thinking. Many other classifications emerged, differing in the number and range of coping categories. But there is a lot of criticism about how coping items are derived (from theory or somewhat arbitrarily) and the ways they are worded (Dewe et al, 2010). Many studies focus on the measurement of coping, and the result is that coping is defined simply through the use of

¹⁸ The research was carried out for a PhD degree at Bar Ilan University, under the supervision of Professor Dov Elizur and Doctor Eyal Yaniv, Department of Business Administration. The dissertation was approved on 24/12/12.

critical analysis of ‘coping checklists’ (Coyne & Gottlieb, 1996). Also, there is a problem in the way that coping strategies are statistically classified. For most researchers factor analysis is the preferred tool to create coping components (Dewe et al, 2010). Nevertheless, researchers have raised concerns about this technique especially whether using factor loadings as a method for including or excluding coping items reduces the comprehensiveness of the measures (Folkman, 1992), for instance “ignores the fact that a coping item may serve a number of functions or that a number of coping items fulfill the same function and limits the meaning and interpretation of factor scores” (Dewe et al, 2010, p.43). Therefore, factor analyzing coping data may need to be treated cautiously (Aldwin, 2000).

In light of these arguments, "coping research requires refashioning (Coyne & Racioppo, 2000), bringing with it a level of conceptual and methodological sophistication that has yet to reflect the field as a whole" (Somerfield & McCrae, 2000). We tried to meet the challenge. By using facet theory, we answered most of the claims made above.

The structure of coping with stress

After reviewing the literature, we developed a **general** framework of coping with stress by means of facet theory. Facet theory attempts to formally define the universe of observations and to test hypotheses about the relationship between the definitional framework and the structure of the empirical observations (Elizur, 1984). A facet is a group of common traits that represents semantic components of a context field (Yaniv, 2011). The framework of defining a concept that can be formally expressed in a phrase is called a ‘mapping sentence’. The mapping sentence serves as a guide to create structured assumptions, to plan and collect observations, and to analyze data (Levy, 2005). The following mapping sentence presents ways of coping:

The assessment of subject (x) that in order to resolve stressful situation (Y) he\she will respond in:

A- Modalities

B- Direction

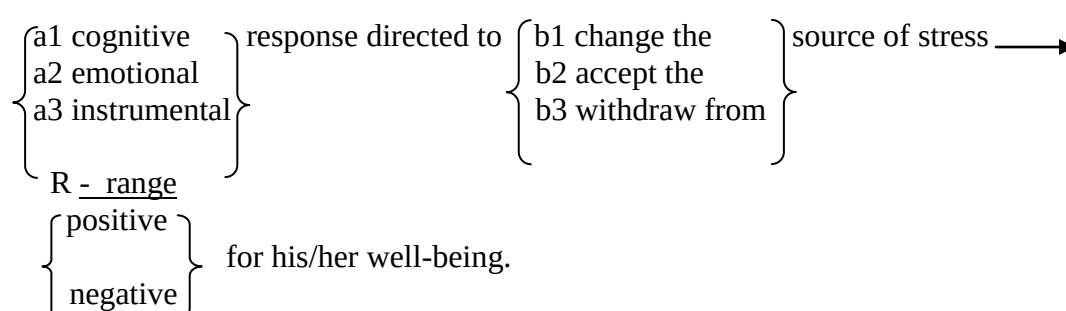


Figure 1. Mapping sentence definition of coping strategies

In order to validate the suggested structure of coping, we used Similarity Structure Analysis (SSA). SSA is a technique for viewing a similarity (correlation) coefficient matrix. It is an intrinsic data analysis technique with an emphasis on looking at regions in the space of variables rather than at coordinate systems (Levy, 2005). When the similarity between two items is high, the distance between the points representing them is relatively small. Conversely, when the similarity between two items is low, the distance between their geometric points should be relatively large (Elizur, 1984).

Comparison between two methods of validation: SSA and FA

SSA and exploratory FA share a common purpose: to reduce the number of variables by making parsimonious groupings (Maslovaty, Marshall & Alkin, 2001). Guttman (1982) described six differences between FA and SSA: First, SSA affords greater flexibility in describing the relationships among variables. Second, SSA represents domains in fewer dimensions. FA's technique relies on strict assumptions of linearity while SSA allows for possible nonlinear (monotone) relationships between variables. Third, similarity coefficient is not adjusted for reliability. SSA produces fewer dimensions without “tampering” with diagonals of the correlation matrix (Guttman, 1982). Fourth, SSA results may be easier to represent in a visual geometric form. Fifth, SSA results may be based on use of monotonically transferred correlation coefficients and sixth, large sample size is not critical when SSA is used and it would still be meaningful.

In this research we compare between the two methods of validation: SSA and FA for analyzing the structure of the coping with stress domain.

Method

Sample and Procedure

The sample included 554 employees of various organizations in Israel, representing a wide range of jobs; 51% female and 49% male. Their age was between 18 and 67 (average=37.8, SD=9.57). 83% were married or in a relationship, 13% single, and 4% divorced. Employment period in the organization was between two weeks and 45 years (average=8.18, SD=8.08), and in the job between two weeks and 35 years (average=4.46, SD=5.07).

44% work in the hi-tech industry, 13% in traditional industries, 31% in services, and 12% in other industries. 20% are employed in public institutions, 73% in private organizations, and 7% in other frameworks (NGO, kibbutz, etc.). 44% hold various levels of managerial positions, and 56% are not managers.

The 554 participants were sampled in three ways: 100 hard-copy questionnaires were filled out by Business Management or Behavior Sciences graduate students at Netanya Academic College (delivered by the researcher); 459 questionnaires were distributed by a “snowball” method convenience sample, of which 367 were filled out electronically (EST – electronic survey technique) by means of a designated online questionnaire. The remaining 92 questionnaires were distributed by hardcopy. Five questionnaires were not complete, and were excluded from the sample.

Coping Questionnaire

We constructed a structured self-reporting questionnaire to evaluate ways of coping with stress based on Facet Theory. The questionnaire was constructed on the basis of the defined facets: coping modalities and coping direction. The product of the elements ($3 \times 3 = 9$) provided 9 strutures, which together represent the conceptual space and constitute the items in the questionnaire. We added two combinations in order to enrich the questionnaire.

Results

An attempt to compare between two methodologies: factor analysis (Exploratory and confirmatory) and Similarity Structure Analysis (SSA) is done in this section.

Factor analysis of coping

Exploratory Factor analysis

Table 1 presents the FA varimax structure coefficients of the coping domain. The analysis yielded three factors (eigenvalue > 1) that explained 57.82% of the variance explained.

Factor analysis identified only one of the facets “direction of coping” (Facet B), with three factors: the first factor represents the element “withdrawal from the source of stress” (except for item 43 “angry that I had to adapt to the situation”(R)), factor 2 represents the element “Change source of stress” and a third represents the element “accept the source of stress”. It did not reveal the facet of coping modality.

Table 1. Rotated component matrix of coping and the percent of variance explained by the factors

Question No.	Question:	communalities		
		Factor 1 withdraw	Factor 2 change	Factor 3 accept
47	Looking for another job	.88		
38	Examining other job opportunities	.84		
44	Feel comfortable to look for another job	.83		
43	angry that I have to adapt to the situation (R)	.57		
48	Busy myself more with hobbies and social activities	.41		
45	Work to reduce stress		.81	
42	Feel challenge to reduce stress		.79	
36	examine ways to reduce stress		.71	
46	Adapt to the requirements			.71
37	Considering how to adapt			.70
39	Re-evaluate the situation as positive			.66
	Percentage of variance explained	25.03	18.18	14.60

Confirmatory Factor analysis

Figure 2 presents the results of Confirmatory FA of coping for the direction facet (B) by means of SEM-Structural Equation Modeling. SEM examines how the proposed model matches the data in the study and examines the validity of the complete model. We used Amos version 7 for the SEM examination. In order to improve the results, we deleted one of the questions (q43) that had low communality with the factor “accept” (0.02). Testing goodness of fit of the model to the empirical data provides only reasonable fit. We refer to the Normed Fit Index (NFI), the Goodness-of-Fit Index (GFI), and the Comparative Fit Index (CFI), all required to be higher than 0.9 (McDonald & Ho, 2002). As we can see in figure 2 they are all above or very close to 0.9 (GFI=0.942, NFI=0.887, CFI=0.906). In addition, RMSEA (root mean square error of approximation) should be lower than 0.1 (Jöreskog & Sörbom, 1989). In our model RMSEA is proper (RMSEA = .089). It is recommended $\chi^2:df < 2$. This condition is not met in this case. We found significant χ^2 , that means there is statistical

difference between the proposed model (SEM) and the data obtained χ^2 (32)= 170.977, $p<0.05$ (McDonald & Ho, 2002). Thus, confirmatory factor analysis validate partially facet B.

Figure 2- Confirmatory Factor Analysis_coping direction

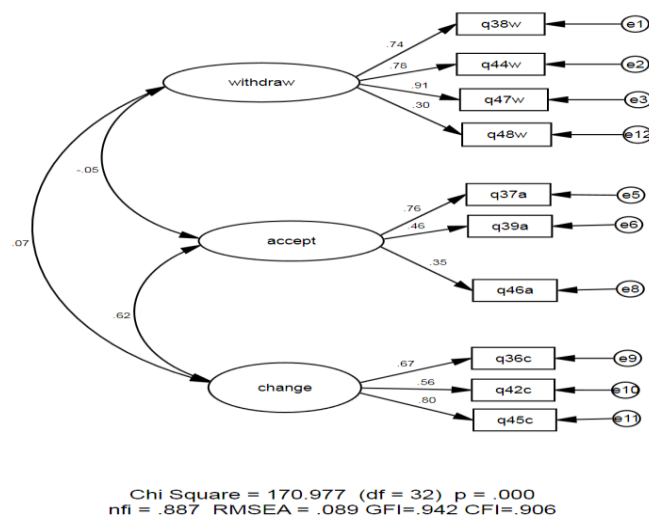
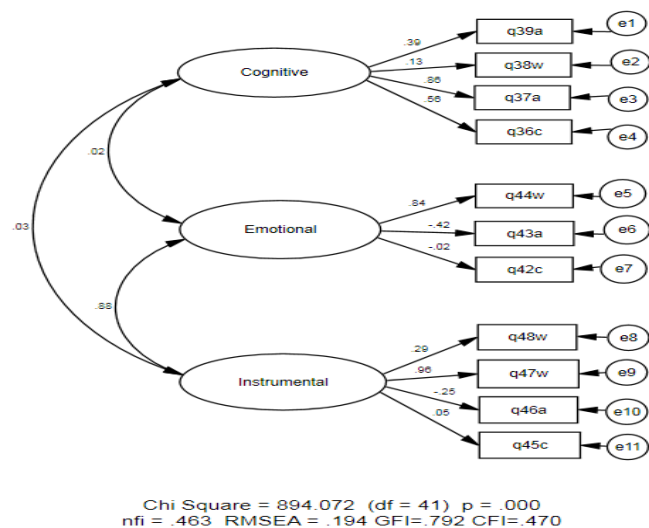


Figure 3 presents the Confirmatory FA of coping for the modality facet (A), by means of SEM. The goodness of fit of the model to the empirical data is poor (GFI=0.792, NFI=0.463, CFI=0.470, when all required to be higher than 0.9 (McDonald & Ho, 2002)). In addition, RMSEA=0.194 (should be lower than 0.1 (Jöreskog & Sörbom, 1989)). It is recommended $\chi^2:df<2$. This condition is not met in our research. We found significant χ^2 , that means there is statistical difference between the proposed model and the data obtained χ^2 (41) = 894.072, $p<0.05$ (McDonald & Ho, 2002). Thus, confirmatory factor analysis did not validate facet A.

Figure 3 -Confirmatory Factor Analysis_Coping Modalities



Similarity Structure Analysis (SSA)

To analyze the structure of the coping domain by Similarity Structure Analysis the SSA computer program of HUDAP 5 (Hebrew University Data Analysis Package) was applied.

The distribution of data was examined on a two-dimensional presentation. Regarding the measures of goodness of fit, the coefficient of alienation found for the two-dimensional map was 0.11, which is considered to represent a relatively good fit between the correlation matrix

and the graphic presentation of the variables. Coefficient of alienation is a technical term that expresses the degree that the physical distances between the items on the map reliably reflect their interrelations, namely, the extent to which the software had to make concessions in order to display them. The range is between 0 and 1, and the lower the coefficient of alienation, the better the fit (Friedman, 2008).

Another measurement of the fit quality of the data and the map evaluates the extent to which the obtained empiric model reflects the assumed content facets, that is to say, the congruence between the theoretical model and the spatial dispersion of the empiric data (Friedman, 2008). This measure is called Separation Index or Regionality Index, and its range is between 0 and 1; the higher the value, the better the fit.

Figure 4 presents the structure of Facet A –coping modality. Observing the map, three circular regions can clearly be distinguished: all the cognitive items are located in the inner circle, the instrumental items surrounding them, and the emotional items in the periphery. A facet that organizes the items from the center toward the periphery is called a modulating facet. The coefficient of regionality 0.91 indicates a very good fit, and the coefficient of alienation 0.11 similarly indicates a good fit. The obtained structure supports the definitional framework including the modalities of coping facet.

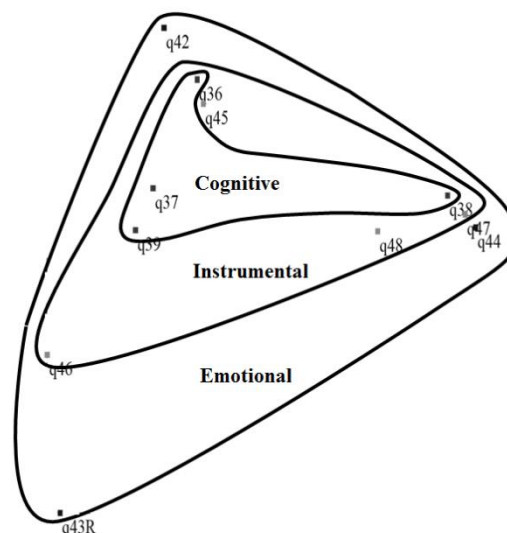


Figure 4. The Structure of coping modality. Two-dimensional SSA, Regionality 0.91, Coefficient of Alienation 0.11

Figure 5 presents the structure of Facet B –coping directions. Observing the map we see that the facet elements occupy regions in the various direction angles away from the origin (center). This is a polarizing facet. The regionality coefficient of 1.00 indicates an excellent fit. The obtained structure supports our hypothesis of three coping directions.

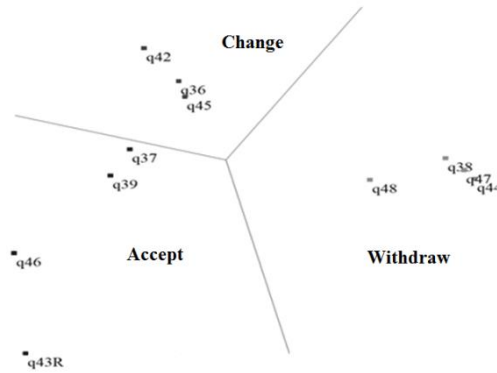


Figure 5. Structure of coping direction – two-dimensional SSA, Regionality 1.00, Coefficient of Alienation 0.11

Figure 6 presents the total structure of the coping with stress domain. The two facets: modalities of coping and coping directions, one modulating and one polarizing, together obtain a radial structure, called Radex.

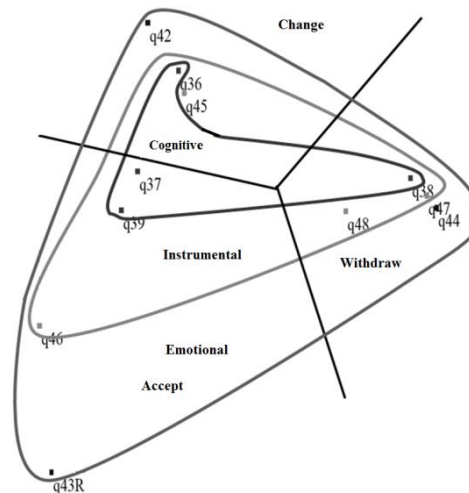


Figure 6. General structure of coping with stress, Radex, two-dimensional SSA

To sum up, SSA clearly shows that the total structure of the coping with stress domain is a radex structure including the modalities of coping facet (cognitive, emotional, instrumental) and the coping direction facet (change, accept, withdraw). The empiric results support the decisional framework of coping, as defined in the mapping sentence. Each facet as well as its elements occupies a distinct region in the conceptual space.

Discussion

In the present study we tried to explore which of the two approaches facet theory (by means of SSA) or factor analysis would provide a more comprehensive structure of the coping with stress domain. We expected that the new definitional framework would express the complexity of coping and would provide a new perspective that would contribute to the academic coping discourse. To examine the structure of coping, we developed a questionnaire that served as a theory-based measuring tool. The questionnaire was validated by means of Similarity Structure Analysis (SSA).

The empiric results indeed reflect the components of coping as defined in the mapping sentence. Distinct regions for each of the facets and their elements (A Modalities: emotional, cognitive and instrumental; B Direction: change, accept and withdraw) could clearly be distinguished. The two facets together provide a radial structure, a radex.

Comparing the two analytical approaches presented here (FA and SSA), Similarity Structure Analysis (SSA) has substantial benefits as compared with factor analysis. While factor analysis identified only the coping direction facet, Similarity Structure analysis (SSA) on the other hand, shows clearly both facets: modalities of coping and coping direction. Factor analysis needs three dimensions (factors) to show one facet, while the SSA shows both facets and the overall coping structure in a two dimensional solution. Since science strives for Parsimony, facet theory is advantageous also in this respect.

Factor analysis attempts to identify items that are closely related considering them as belonging to the same content universe and as belonging to the same dimension. It cannot identify elements from modular facet because of the low correlations between the items in the periphery cycle. While Factor Analysis provides a numerical table (Table of communalities), SSA provides a geometrical presentation of all the items enabling to view the total universe of observations, and as known, one good picture is better than thousand words (or numbers ..) (Even-Zohar, 2008).

Given the advantages of facet theory, it appears to be useful for conceptualizing coping as well as other complex constructs.

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A methodological dilemma

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Abstract

In the literature about qualitative methods there are few instructions about which problems you might encounter when conducting cross-cultural interviews. When conducting interviews with open-ended qualitative interview as the method one should also remember that this method originates from the American-European perspective. When conducting these types of interviews in China we have encountered some problems to which we were unprepared by the literature. We therefore saw a need to uncover these difficulties and how we solved (or didn't solve) them to encourage a broader discussion about this and how to handle this type of cross-cultural issues in research situations but also in other types of interviewing situations. The differences between the Chinese interview situation and the European interview situation will be presented in eight points, we will present examples and discuss solutions and implications for validity.

Introduction

During 2012 and 2013 both of us traveled to China to conduct research. We are from different cultural backgrounds ourselves (French and Swedish). The respondents and the subjects we were investigating are very different from one another but our method has been the same, both of us used a phenomenological approach and the open interview is a fundamental part of this type of qualitative research. We are both schooled and have experience in the traditional way of conducting interviews and both of us encountered problems in conducting interviews the western way while in China. Our way did just not seem to be the "proper" way there. We have combined our experiences into eight areas where the interviews in China differ from interviews in Europe. We will look at these areas one by one, presenting our own experiences and review the literature about the concept. We will also try to summarize the pros and cons with each area and the possible "solutions" to the situation.

Theoretical background

When comparing different cultures and making interviews in a culture which is not your own you have to face certain difficulties. One is that when making a cross-cultural comparison with people with different languages the language barrier is hard to overcome. You might have to use a translator or speak a language which is not your mother tongue or the mother tongue of the person interviewed. This might give room to biases. Another difficulty is the method itself is also hard to use in the way you are used to. Although you are familiar with the proper way of conducting qualitative open interviews, this method might not be suited to make a qualitative open ended interview in another culture as the way of conducting such interviews are researched upon and developed in the western world (Brislin, 1976; Laverack & Brown, 2003). Alison Karasz and Theodore Singelis (2009) write in an introduction to a special issue of *Journal of Cross-cultural psychology* concerning mixed methods and qualitative methods in cross cultural research: "Because most theories have been developed by Western, middle-class psychologists, it has been proposed that they may be ill suited to the study of other groups" (p. 914).

This proposal is also worth considering when it comes to the method used by psychologists, and it has been considered concerning quantitative methods in cross cultural psychology. Qualitative methods are often called for as a remedy to these kind of problems (Brislin, 1976; Karasz & Singelis, 2009). But even though the qualitative methods are better in terms of adapting to the environment they are far from perfect which my research has shown. The method of a qualitative interview has been developed with the Western society in mind (Laverack & Brown, 2003). It is also unclear if such considerations are taken at all when working with recruitment instead of research, as the many recruitment methods are built upon research done without a throughout understanding of these types of problems, if indeed based on any research at all.

Brislin (1976) discusses the problem with taking one research instrument and applying it to another culture where this instrument is not relevant. One real-life example of that is when a Chinese colleague of was making a questionnaire about teen students' views on school and education. She was comparing Chinese students with Swedish students and she made a questionnaire which she had already distributed in China. She translated the questions into Swedish and let Swedish students fill out the form. The result puzzled her. The Swedish students had left half the form blank. She asked me to look at the questions and I immediately saw the problem: Half of the questions were about high school, a phenomenon very common in China but extremely unusual in Sweden. Very few Swedish students would take private lessons after school. The Swedish students had thus failed to understand the part of the questionnaire relating to night school.

Although some researchers are aware of the problem and does mention a need for new types of methods few of them come with concrete suggestions of solutions and none of them gives practical examples of the problems you might encounter. Furthermore they seem to focus on the interpretation of the data more than the collection and the situation of the interview. In this paper we will try to give concrete examples along with our own way of solving them.

1. What is the correct answer?

This is something far from unique for China, the situation where the respondent try to find out what you want them to say and then answer your question "correctly". In several occasions we have experienced that they have apologized for not giving us the answers that they think we wanted. This can also be experienced in Europe and countries such as in Sweden or France, but after explaining that it is the experiences and thoughts of the respondent which is in focus and that there are no "right" answers, this sort of behaviour usually subsides and in the course of the interview the respondent tend to relax and feel more comfortable with the answers he or she is giving. In China, this has not been our experience. Even when explicitly told there are no "right" answers, the respondents frequently apologize for not saying what we want to hear or not having good enough examples to give us.

When conducting open interviews, it is often necessary to ask broad questions in order not to influence the respondent in any direction. A typical question could be: "Can you tell be about your experience, associations, thoughts or emotions of this phenomenon? If you don't have any specific experience, tell me all you come to think of or associate to this." When asked in Sweden or France, one can sometimes get a confused look and a follow up question like "what do you mean, this phenomenon how?" but then it is usually enough to tell the respondent that "I am interested in your point of view. All association thoughts and emotions you want to express is also what I want to hear." In China, this is also usually accepted as a response and the respondent start answering, but unlike in Sweden or France, the Chinese

respondent will often interrupt her/himself and ask: “Is this what you want to hear?” or “Is this example correct?” or even apologizing for not having the “correct” experience. One respondent started the interview with saying that she was not “traditional Chinese”, so that she will be unable to give a correct answer to the question.

The issue one of us investigated was about standing up for one’s moral in an immoral society and many of the answers were so alike and so “non-threatening”, that she began to wonder if they were true or only a symptom of social desirability. “I study when all my friends are lazy”, “I always wait for the green light before crossing the street” (if the response rate of this was any indicator of how Chinese people acted in traffic, the traffic situation in China would be drastically different) and “I don’t smoke and/or drink although my class mates do”.

Another one of us was studying the cultural vision of the world of 5 to 6 years old Chinese children, met in different kindergartens. The children were asked to draw two different pictures (“their family/home” and “their friend’s family/home”) and then talk about it. A translator enabled the conversation between the researcher and the child. An interesting fact was that they were most of the time only able to talk about their drawings in a descriptive way; we could see that they were not comfortable and used to talk about their personal feelings and thoughts. Maybe it was more reassuring for them, the guarantee of no wrong answer. Maybe it was also how they are used to do it at school. Moreover, the translator herself, even if the researcher had explained to her before the importance of letting the child express himself as he wants to, she was sometimes embarrassed because she thought the child didn’t talk enough or didn’t say what the researcher expected. It was necessary to remind her that how the interview goes depends on the child, not on the researcher, that there is no right or wrong answer, each answer is interesting.

Once, one teacher of the kindergarten came to observe her pupil during his interview, even if I tried to tell her it was important that she stays away, to not disturb him. Clearly the child was not feeling comfortable, the stress of giving the “right” answer was even bigger, and at one point, the teacher guided the child on what he should talk about. Here, we can see that this question of giving the right answer is very important and there since the very beginning of the education of Chinese people.

No matter how many times we stressed that we wanted *their* view it did not sink in. If no hints about the correct answer were given the respondent acted very stressed and did not talk much at all or they make a guessing game out of the interview. One way to solve this was to wait and let the respondent give all “the right” answers so that they get the opportunity to continue to their own. An issue here is of course to distinguish “their own” views from the ones they believe correct.

2a. Privacy, a matter of logistics

One of us has found that it is somewhat hard to find places to talk privately. In many schools or working places there are few private rooms to conduct an interview in. People often live many people in a small space so it is also hard to find privacy in people’s homes. Interviews are therefore often conducted in a corner of a room where other people are working, cooking, studying or something else. It is also a matter of weather. In southern China the weather often gets very cold in the winter time. It is therefore not a viable solution to ask people to leave the home to conduct an interview, especially when interviewing children or elderly. In the summer on the other hand the weather is very hot, it might therefore be necessary to keep the door open during the interview even when you have found a private room. The matter of

privacy has to be weighed against the matter of physical comfort and as point 2b will show sometimes privacy is not the most prioritized factor. To have a respondent sit in physical discomfort might not be the best environment for a relaxed interview. It might also be unethical, especially if the respondents are very young or very old.

2b. Privacy? But I don't have any secrets from my friends

Apart from the logistic problem in finding room for a private interview, many seem unwilling to participate alone. Sometimes there will be a translator present but many times, even more people insist to be present during the interview. When the researcher ask these other people to leave, some of the respondents insist for them to stay "I don't have any secrets from my friends". We also find that this might be something beneficial. Many respondents feel nervous in the interview situation and they seem to feel more comfortable when in company with a friend. But sometimes this friend is not only a quiet bystander, many times they interrupt and come with suggestions about what to say and what stories the respondent might have but have neglected to tell. Sometimes they even fill in with their own story. This is also the case for some untrained interpreters.

This is might pose serious threat to the validity of the study. It can affect the person in many ways: a) the respondent do not tell something that he/she wants to because he/she does not want her/his friend to hear, b) the respondent says things he/she would normally not say because he/she is influenced by her/his friend, c) it can increase social desirability.

It can also influence the interviewer by: a) making the situation confusing and the interview harder to follow. Splitting the concentration between people, b) neglecting to ask some questions because he/she does not want to embarrass the respondent in front of their friend. In some cases, this friend is also due to be the next respondent for the study. This will naturally lead to even more problems as the next respondent might be influenced by the former.

There are, however, positive things about letting their friend attend the interview: a) the respondent might feel more comfortable. Many Chinese respondents feel shy in an interview situation especially when interviewed by a western person (see point 4). Having a friend as support might get the respondent to overcome this shyness, b) when interviewing a person about a difficult subject, the friend can help explain and sometimes remind the respondent of experiences which match the question. This has proven to be very important, in some interviews about morality the respondent did not think herself/himself as doing something moral but the friend reminded her/him and very interesting stories unravelled. Of course being reminded what to say might get the person to think in a certain way, but it might also be the springing point where the respondent has a story to tell (and a right answer, I have a story! See point 1) and from there the interview can go more smoothly. We often find that getting a person to tell a story opens up the conversation and makes it easier to ask about thoughts feelings and processes after the story has been told, although this is not always the case in China (see point 5, 6 and 8).

To support what has been said in 2b, here is also an interesting experience: the one of us who was working with Chinese children planned to receive them one by one, but the Chinese people who were helping her recommended that the children should be in group (of three in our case), because they probably won't be able to do it otherwise. The explanation they gave was that the children won't dare to do something personal if they don't see the others doing it.

It's like their "personal view" necessarily depends on the group view, or at least it is the way the school teach them.

Allen, Inenaga, Van Der Velden and Yoshimoto (2010) explain the influence, in Japan, of the collectivist thought on Japanese people's behaviour. In the Japanese culture, from the day they were born, people are ensured to be a member of a solid and united group in exchange of an unconditional loyalty. They will behave according to the group interests, even if it doesn't serve their own. The Japanese culture is organized around an interdependant and mutually connected Idea of the Self.

The work of Allen, Inenaga, Van Der Velden and Yoshimoto (2010) is about Japanese culture but, maybe, we can make the connection with the Chinese culture and what we have seen there. The difficulties we both have encountered, conducting our researches, is maybe due to this collectivist Idea of the Self, which is very different from our own. Indeed, we have more an individualistic Idea of the Self, we talk more easily about ourselves without the group. We are more independent in our thinking, while they maybe need the group to freely express themselves. Maybe the group presence is what allows Chinese people to have a thinking, when the group is seen as a threat to individual thinking in France or Sweden...

For instance, when we met Chinese children or adults and asked them to talk about themselves alone, maybe it was difficult because it would have been more spontaneous for them to do so if the group is here. And indeed, it was, when we changed the procedure. By comparison, as French and Swedish students, we would probably feel much more uncomfortable talking about ourselves if the group was here.

3. Insecurity about being recorded

When conducting interviews in Sweden or France, people don't seem to mind being recorded, this is different in China, especially when interviewing older people the tape recorder can make them feel very nervous. They keep looking at the recorder and their mannerisms change substantially when I put it on. This sometimes happen in western countries too, but normally the sideway glances on the tape recorder subside when the respondent is informed about what will happen with the material and that it is for my ears only. In China, these sideway glances continue however and the respondents might clearly feel uncomfortable with the device during the course of the entire interview. The obvious option is not to take a recording, but this option is far from perfect. Notes tend to be unreliable and to miss parts of the conversation. Taking notes might also have the side effect of the respondent feeling like they are taking a test and further strengthen the effects described in point 1.

4. Suspicion about westerners

In the big cities of China it is not very unusual to see western people these days. It is not the same in the smaller towns and villages, however. For some respondents, the meeting with a foreigner might be their first and it might make them very shy, or just too astounded to feel relaxed during the interview. Just as in point 3, our experience is that this reaction is more prevalent among the elderly. Younger people tend to be very shy in the presence of westerners, especially if they are expected to speak English. If an interpreter is present, this shyness can present itself by the respondent focusing only on the interpreter and avoiding eye contact with the interviewer. One way to solve this is, off course, to remove the westerner from the interview situation and let local Chinese make the interviews. This might be a viable alternative but if the interview is to be analysed by the westerner and if the study will be conducted in other countries, as well to make a comparison, it can be important to the

understanding of the context that the westerner is present. It can also be a matter of trouble with finding a person who is trained in making qualitative interviews in an open manner. Many Chinese psychologists, not to say most, focus on quantitative measures and at many universities it will be hard to find someone who is trained in qualitative method.

5. Reluctance to talk about themselves

In the interviews, it has been hard to convince the respondents that their own perspective is important. They often speak about abstract examples instead of giving experiences from their own life. This happens even when explicitly asked about own experiences and to give an example. When they do tell an example, they tend to exclude everything except for what happened. Very few reflect upon their feelings, emotions and motives. When the researcher asks for an example, she clearly wants to know what happened and shouldn't be bothered with personal reflections. Sometimes, they redirect the attention, telling someone else's story, which they perceive as more "correct" in terms of what the researcher has asked about. It could be a matter of them trying to be humble and not presenting their own experiences as more worth than somebody else's. This difference in willingness to speak about themselves might be a result of differences in personalities between cultures. Chinese respondents tend to be more shy about their experiences (and shy as a whole) than western respondents. This could be due to the lower extrovertism and higher neuroticism they show (Allik & McCrae, 2004).

6. Less willing to talk about what has already been said.

One way to get people to tell you everything there is to know about an event is to return to it and ask if they can tell you more. Whereas in most cases, we have experiences in Europe this is followed by a frown, a pause and then a new dimension of the issue, what we mostly get in China is a short: "no, that's all" or a confused look, why would we want to talk about this again? Sometimes a follow up question is taken for criticism, didn't I tell the correct story or didn't you understand me the first time?

7. But enough about me tell me something about your experience!

Never before has one of us experienced that so many of the respondents turned their questions to her. It happens of course when you have an interview in Western countries, but more rarely but in China almost everyone who is not too shy has been asking her opinion in psychological matters. In the middle of the interview, they throw back the question and ask: "What do you think? What's your hypothesis?" Here it is very hard to know what would be the right course of action. The researcher could chose to ignore the question, saying that she doesn't know or that she will answer later. This is what she would normally do in Europe. But as she is already in a situation with a suspicious respondent who is reluctant to tell anything about her/himself, she could use this situation to build trust. She could answer the question (provided it's not directly related to the subject researched, when it could be a problem with influencing the subject) and thus with the help of the social rule of reciprocity establish a trusting relationship with the respondent.

8. Now I have answered you question. Give me a new one.

Very often in China, the respondent tries to answer correctly and fast to the question given. They then wait for the next question. It is not often you hear them "think out loud", as is often the case in Sweden or France. This makes it more difficult to answer follow up questions which derives from the respondent her/himself. There is just not that much information to help with the follow up questions. This affects the validity of the study, the more questions you ask which is part of a "question battery" made before the interview the more you risk to

influence the respondent. Taken together with the unwillingness to develop, talk about thoughts and feelings and going back to things already said, it poses a big challenge for the interviewer. An answer is often followed by. “That’s all. What is the next question?”

Even the children met by one of us had this tendency to give brief and not detailed answers. It is encouraged by the adults around, like the teachers or the translator, as if it is a socio-cultural behaviour. They say what is relevant and enough according to them, and don’t “lose themselves” by saying something useless. This can be related to the fact that trite phrases are not appreciated in China, and you should not use it in everyday life.

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La culture sourde en héritage: Une pratique psychologique de l'interculturalité. Recherche phénoménologique psychanalytique

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Abstract

Our study speaks about the deafness, but the deafness see like a cultural difference, not like a disability. The handicap is the result of social functioning what put some minority on the margin; so a cultural exclusion process, a values choices (Mottez, B., 2006). In this way, the study broaches the transmission of Deaf culture at hearing childrens born from deaf parents. The target was to show theorical and practical similarities between intercultural psychology and issues in deafness. To attach importance to values in any situation et therefore in work specially. Some attitudes in intercultural meeting, like the “decentration”, that shave some behavior from stereotype and prejudice.

We have select a methodology to enable us to be listening to problems of our subjects, who show some interesting and singular adaptative strategies. The MCA-Minerva methodology from Roger Sages with a psychoanalysis approach has been used. We have met two co-researcher, a woman and a man, between thirty and forty years, hearing born form deaf parents. They was freely formulated by write on tens words (about culture, deafness, communication...) and had participated at a half-directive interview about their life.

The meeting with hearing childrens born of deaf parents (CODA) allows us to light some functioning, feelings, attitudes, adaptative strategies. We have been able to see a strong militant feeling towards Deaf community, exclusively positive and an affirmative position between two culture, important element for the integration of childrens in school or any working place, with different cultures and not only ethnic.

Introduction

Notre étude porte sur la surdité, mais la surdité vu sous l'angle d'une différence culturelle, et non pas comme un handicap, comme elle est le plus souvent caractérisée.

En effet, le handicap est le résultat d'un fonctionnement social mettant en marge un certain nombre de minorités, donc un processus d'exclusion culturelle, un choix de valeurs (Mottez, B., 2006). Si une personne naine vivait chez les Pygmées alors elle ne serait pas considérée comme une personne handicapée par sa petite taille. Quand une personne sourde est entourée d'autres personnes sourdes celle-ci n'est plus handicapée. C'est la rencontre et la communication entre une personne sourde et entendant qui est source de handicap. Cette rencontre devient une « situation de handicap ». La personne entendant est aussi handicapée dans la communication que le sourd. Ainsi on ne considère plus le handicap comme facteur interne de la personne sourde mais comme un facteur externe de la situation sociale entre deux personnes ayant une langue et des références culturelles différentes.

Ainsi, nous avons choisi de s' intéresser à la question de la surdité sous un angle culturel, comme une différence culturelle. En effet, on peut parler de culture Sourde du fait de leur passé commun, de leur langue commune et de leur rapport au monde commun lié à leur différence sensorielle. Cet aspect culturel reste peu considéré dans notre société. Ce manque d'intérêt engendre des mal entendus quotidiens pouvant engendrer des conflits importants ou des mise à l'écart discriminantes. Dans le monde du travail par exemple, les attitudes des entendants, complètement inconscientes car culturellement codées, peuvent mettre à l'écart

des personnes sourdes pourtant totalement aptes à répondre aux exigences du travail. Ainsi, mettre en perspective l'importance des valeurs dans n'importe quelle situation, mais aussi au sein du travail où les valeurs individuelles sont souvent dénigrées ou peu prise en considération paraît essentiel pour comprendre des situations interculturelles variées.

Plus spécifiquement, notre étude aborde la question de la transmission de la culture Sourde chez des enfants entendants de parents sourds (Nous notons Sourds ou culture Sourde avec un S majuscule pour désigner l'aspect culturel de la surdité). De formation clinique interculturelle, notre objectif de recherche était alors de mettre en perspective des parallèles théoriques et pratiques entre la psychologie interculturelle, étudiée lors de notre formation universitaire, et les problématiques en jeu dans la surdité.

La rencontre avec des enfants entendants de parents Sourds nous permettait alors de travailler la transmission de la culture Sourde et des effets de celle-ci sur leurs enfants entendants. Au même titre, que la culture de parents migrants a des effets sur la constitution de soi chez l'enfant dit « de deuxième génération » d'origine migrante, nous pensions que la culture Sourde pouvait avoir des effets sur le développement de l'enfant entendant de parents sourds. Les Enfants Entendants de Parents Sourds dit les EEPs ou CODAS (Childrens of Deaf Adults) représenteraient ce que l'on nomme souvent « l'entre deux culturel », entre la culture Sourde et la culture entendante.

Aspects théoriques

Pour aborder notre terrain de recherche, nous souhaitions être au plus proche de l'expérience de vie des sujets. Nous écarter au maximum de nos idées préconçues de la situation et des difficultés que ces personnes auraient pu ou non rencontrer dans leurs vies. Il s'avère que certaines attitudes dans la rencontre interculturelles, comme la « décentration », nous permettent d'éviter certains écueils relatifs à des stéréotypes ou préjugés que nos sociétés ethnocentrées véhiculent inconsciemment.

Ainsi, nous avons choisie de nous positionner dans un champs théorique et méthodologique phénoménologique. Pour notre première approche de la phénoménologie, nous nous sommes orientés majoritairement vers la phénoménologie Husserlienne et ces développements chez Merleau-Ponty.

L'essentiel de cette théorie est d'approcher au maximum le « sens de la vie » du sujet. Être au plus proche de son interprétation de son expérience de vie. Chacun met un sens différent à une même expérience et il est important de prendre en considération la singularité de chacun. Tenter d'appréhender une objectivité en analysant en profondeur comment les personnes mettent du sens au monde. Ainsi, on tente de se détacher de ce que l'on appelle nos pré-compréhensions. S'éloigner de notre vision du monde pour s'approcher de la leur : attitudes similaires à la décentration en psychologie interculturelle. Nous nous trouvons alors au moment de la recherche où il nous faut tout reconsidérer pour atteindre l'objectivité, ce que l'on appelle « l'Epochè » en phénoménologie.

L'objectif en phénoménologie est alors d'atteindre le niveau d'analyse le plus profond possible, qu'on appelle l'analyse du phénomène. Le sujet vit le monde qui l'entoure par intentionnalité, par visée intentionnelle et signification. Cela représente sa relation au monde qu'il s'agit d'analyser.

Par un mouvement de réduction phénoménologique, il s'agit d'effectuer un re-tour en arrière, vers les différents moments de la constitution des sens, constitués par le sujet lui même, dans son monde-de-la-vie. Le chercheur doit remonter à l'unité la plus petite possible du discours recueillie contenant du sens, afin de les analyser séparément et de prendre en compte chaque aspect intentionnel que le sujet y a mis. Puis au final on en tire une analyse générale. Ainsi on obtient ce que Husserl nomme « la structure noético-noématique ».

En plus de ces apports théoriques phénoménologiques, la clinique interculturelle ; par ses réflexions autour de l'identité métissée, de la transmission intergénérationnelle, de la place de l'entre deux, des questions autour de la langue maternelle interprétés selon l'approche phénoménologique ; nous a permis de penser notre recherche sous un angle le plus ouvert possible, au delà du handicap.

De plus, nous précisons que nous nous plaçons dans un référentiel d'analyse psychodynamique. Ainsi, nos analyses cliniques sont influencées par les théories psychanalytiques, freudienne plus précisément.

D'autres part, les apports théoriques liés à la surdité (aspects médicaux, sociaux-culturels), nous ont permis de mieux appréhender le contexte global de notre sujet d'étude.

Description méthodologique

Ayant choisi un positionnement phénoménologique, notre étude ne comporte pas ce que l'on appelle classiquement dans la recherche fondée sur l'approche positiviste des hypothèses. En effet, optant pour une attitude d'épochè, il nous fallait être au plus proche du sens de la vie des sujets rencontrés avec le plus possible de contrôle de nos propres pré-compréhensions de la situation. Les hypothèses ont pour effets de biaisais notre regard en orientant notre réflexion sur certains aspects choisis de la situation analysée. Nous aurions pu par exemple choisir de poser comme hypothèse que la langue maternelle de la langue des signes des enfants entendants de parents sourds engendre des difficultés d'apprentissage de lecture. A notre sens, poser ce type hypothèse peut réduire le champ des possibles d'analyses et s'éloigne du vécu des personnes.

De cette manière, nous poserons des hypothèses d'analyses dans un second temps, après avoir décrit et analysé la constitution du sens des sujets rencontrés. Pour nous, cette position se rapproche de celle du psychologue clinicien qui accueille une personne, écoute son histoire et dans un second temps se permettra de tirer des interprétations afin de soutenir la personnes dans ses difficultés.

Pour cela, nous avons choisi une méthodologie de recherche empirique fondée sur la phénoménologie Husserlienne: The Meaning Constitution Analysis (MCA); et l'utilisation du logiciel MCA-Minerva développés par Roger Sages.

Nous avons rencontrés deux co-chercheurs une femme (que nous nomerons Yasmina) et un homme (Achille), entre 30 et 40 ans, entendant de parents sourds. Ils se sont librement exprimés par écrit sur six mots présentés: Famille - Identité - Différence - Surdit   - Communication - Culture. Ces écrits ont été analysés grâce à la méthode MCA-Minerva.

Dans un second temps, nous avons réalisés des entretiens semi-directifs centrés sur leurs parcours de vie (« Parlez moi de votre enfance, de votre adolescence, de vos relations sociales

et professionnelles »). Ils ont, eux, été analysés de manière clinique grâce à un référentiel théorique psychanalytique et interculturelle.

Au final, les données ont été croisées pour mettre en perspective une analyse globale de leur vécu en tant qu'enfant entendant de parents sourds et de leur rapport au monde.

Cependant, nous ne présenterons ici, que l'analyse des résultats croisés de nos deux méthodologies (analyse du logiciel MCA- Minerva et entretiens cliniques) afin de mettre en perspectives les éléments essentiels que notre travail a permis de relever en ne décrivant que les éléments de similitudes et de disparités entre nos deux sujets.

Analyse des résultats

1. Similarités

Dans un premier temps, nous pouvons relever un fonctionnement relativement similaire au niveau de certains processus mis en jeu, relever par l'analyse MCA-Minerva.

Une majorité de la catégorie *affect neutre, doxa-affirmation*. Un discours majoritairement signitive (qui porte à interprétation), une absence des catégories *probability* et *possibility* dans la modalité *belief*, mais aussi une absence d'élaboration de leur volonté (*will*) par la représentation de la catégorie *none*. De plus, nos deux co-chercheurs se sont peu exprimés par des pronoms personnels, mais plutôt au travers du pronom *it*, représentant un concept ou un objet et non pas une personne.

Ces données peuvent à notre sens refléter un caractère informatif à leurs écrits, une mise à distance non négligeable pouvant relever de mécanismes de défense adaptés comme l'intellectualisation. Il nous semble que cette similarité d'organisation dans leur passation écrite pourrait aussi venir révéler une certaine pudeur de leur part dans une situation de recherche, ce qui peut constituer un biais dans notre recherche.

Serait-il possible que ce mécanisme de défense puisse être révélateur d'un facteur culturel commun? Une manière d'écrire à la française?

De plus, l'entité qui revient majoritairement dans les deux passations est celle en lien avec la surdité qui pourrait de nouveau s'expliquer par notre thème de recherche dont les personnes sont conscientes et qui ont été choisies pour participer dans cette optique là. Cependant, il est intéressant de noter que leur passation se concentre sur cette thématique transversale avec peu de déviations associatives qui aurait pu leur permettre de dépasser cette thématique de recherche. On note ainsi un contrôle conscient de la situation par une élaboration maîtrisée.

On note de plus, une similarité dans leurs représentations souvent clivées entre le monde des Sourds et celui des entendants. Ce processus de clivage commun peut révéler un entre-deux encore rigide, une mixité qui semble compliquée à penser, mais aussi à vivre socialement au quotidien. Cependant, chacun a un rapport à l'entre-deux «mondes» très différent au travers de choix de vies singulières.

Il est possible de mentionner aussi que la surdité est vécue pour eux deux du côté familial paternel (hormis la mère Sourde de Achille mais la seule dans sa famille) et que leur famille maternelle est, elle, entendante. Ce constat pourrait se révéler intéressant dans l'analyse du complexe œdipien.

D'autre part, leur premier mot fut un signe. Leur première langue au sens de leurs premiers échanges se trouve être au travers de la langue des signes, dans une situation de bilinguisme. Il s'avère que la langue des signes est propice aux premiers échanges dans le développement de l'enfant avant la langue orale. Cependant aujourd'hui à l'âge adulte, ils considèrent la langue française comme leur langue maternelle, langue dans laquelle ils pensent et s'expriment. Dans leurs écrits, ils mentionnent la langue des signes qu'implicitement au travers de leur élaboration très générale autour de la communication et de la culture Sourde.

La question de la langue est associée à la question de la communication dans un objectif premier de compréhension qui est un élément essentiel pour eux, mais investi de manière différente: Yasmina vit un sentiment d'angoisse dans des situations d'interprétariats où la compréhension mutuelle est essentielle ; alors qu' Achille élabore autour de ses différentes stratégies adaptatives de communication.

Pour finir, nous avons relevé une similarité au travers de leurs figures identificatoires, une figure totémique au travers de l'oncle paternel pour Yasmina et maternel pour Achille. Nous ne savons pas si l'oncle paternel de Yasmina est l'aîné de la fratrie, mais ceci pourrait constituer un élément d'analyse intéressant autour de la place et la fonction des membres de la fratrie dans une situation de surdité.

De plus, on relève aussi une similarité dans leur expérience de vie à travers le divorce de leurs parents qui cependant peut être pensé comme un événement traumatique pour Yasmina mais pas pour Achille. L'absence du père n'a pas été marquée par la même intensité dans leur histoire de vie.

2. Différences

Au niveau des éléments divergents, nous pouvons relever une plus importante variation dans l'utilisation des catégories d'*affects négatifs et positifs* chez Achille (seulement *positifs* chez Yasmina) et l'utilisation des catégories *negatives* et *question* chez Achille. De plus, la catégorie *imaginative* est investie différemment: Achille l'élabore autour de la communication, alors que Yasmina utilise des métaphores pour exprimer son rapport à la surdité.

Au niveau de la temporalité, Achille présente un discours concentré sur le *présent*, alors que Yasmina présente un discours intemporel, par la catégorie *empty*. Or, ils n'utilisent ni l'un ni l'autre les catégories *futur* et *past*. Un discours figé dans le temps.

Au niveau de leur volonté (modalité *will*), Achille varie beaucoup plus par la présence des modalités *aspiration*, *wish* et *unengagement*. Or, Yasmina fait davantage état de sa volonté dans son entretien par ses sentiments et attitudes de soutien dans la cause des Sourds.

L'entité de la famille, thème associatif important, est investie différemment. Très présente dans l'écrit de Yasmina, celle-ci l'est moins chez Achille. Mais la famille apparaît pour tous les deux comme un support de constitution de soi important, par des mécanismes différents. Cependant, les prédicats en lien avec l'entité famille ne se ressemblent pas.

D'autre part, la question de la culture est élaborée de manière différente dans le discours et dans l'écrit d' Achille en comparaison de celui de Yasmina. Elle se met dans la peau d'un Sourd alors qu' Achille se met en situation de recul, d'observateur.

De plus, il est intéressant de noter que la question des limites est vécue très différemment. Achille se positionne dans un rapport à l'objet plutôt rigide, alors que Yasmina montre des limites relativement poreuses, fusionnelles à l'objet. Cependant, la question des limites est organisée autour de leurs rapports à la surdité. La séparation entre le monde des Sourds et celui des entendants se vit à travers leur famille, dans une vision globale chez Yasmina, alors que Achille s'attache à différencier chaque personne Sourde et entendant dans sa famille. De plus, Yasmina montre un important investissement autour de la surdité, dans sa sphère extra familiale à travers son métier d'interface, contrairement à Achille qui sépare totalement ses rapports à la surdité au sein de sa famille et sa sphère extra familiale dans le monde des entendants

Ainsi, du fait de leur position d'enfant entendant de parents sourds, Yasmina et Achille montrent des éléments communs dans leurs connaissances et expériences de vies de la surdité et de la culture Sourde, tout en se singularisant dans leurs vécus et parcours de vies.

La rencontre avec des enfants entendants de parents sourds nous a permis de mettre en évidence certains fonctionnements, sentiments, attitudes, stratégies adaptatives pouvant révéler d'une transmission de la culture Sourde ou du rapport dominant/dominants vécu par une minorité de personnes Sourdes vivant dans un monde fait pour les entendant. Par exemple, nous avons pu relever un fort sentiment militant envers la communauté Sourde, un discours exclusivement positif et affirmatif.

L'histoire des Sourds a été transmise à ses enfants entendant de culture métissée, cas analogue à d'autres personnes migrantes par exemple où des valeurs et des codes différentes entre en jeu. De plus, leur position d'entre deux peut révéler certains conflits intrapsychiques.

De plus, la question de la langue maternelle, au même titre que les enfants de parents migrants, est essentielle à prendre en considération dans leurs problématiques. Cependant, au delà de la langue, les questions sociales sont elles aussi bien prégnantes, marquant le poids du passé de la lace d'une population minoritaire avec un passé commun, transmis de manière différente chez l'enfant entendant.

Finalement, nous avons posé l'hypothèse d'une transmission d'un sentiment d'exclusion, animant des mouvements de lutte pour la cause des Sourds.

Mais aussi d'une transmission inconsciente du handicap de la surdité symbolisé chez l'enfant entendant par des difficultés relationnelles. Une différence qui peut demander des efforts cognitifs importants d'adaptation.

On peut alors penser que les enfants entendants de parents Sourds, par leur position d'entre d'eux peuvent constituer une source d'informations riches pour la compréhension des problématiques interculturelles entre personnes Sourdes et entendants. En plus du discours des personnes Sourdes directement, le vécu de leur entourage semble nécessaire à prendre en considération si nous voulons améliorer nos accueils envers les personnes Sourdes et soutenir leur famille dans leurs difficultés.

Apports de l'étude

Cette étude peut nous permettre de penser la rencontre interculturelle sous toutes ses formes, au travers d'une différence culturelle autre que la culture ethnique. Le métissage culturel peut se penser au delà des origines ethniques qui ne représente qu'une part de notre culture. Vivant dans une société majoritairement entendante, nous n'avons que peu conscience de nos références culturelles d'entendante.

Or aujourd'hui lorsque nous parlons de situation interculturelle, nous y voyons des différences culturelle au sens ethnique. Par exemple, les médias ne diffusent que des exemples de métissage culturelle avec des personnes migrantes s'intégrant en France. Or les différences culturelles peuvent se jouer comme nous l'avons montrées par des différences liés à des sensorialités diverses, mais aussi des vécus démographiques variés (villes, campagnes) qui peuvent impliquer une vision du monde bien différentes, le fait d'être un personne adultes, adolescentes ou âgées peut elle aussi se penser comme une différence culturelle.

Ainsi, les situations interculturelles se voient au quotidiens et dans toutes sortes de situation. En famille, au travail, à l'école. Penser l'intégration de personnes d'origines différentes vient signifier que nous dénisons notre propre part de différence culturelle dont nous sommes porteur inconsciemment.

Ainsi, l'accueil et l'intégration des personnes Sourdes mais aussi l'écoute des problématiques des enfants entendant de parents sourds, requiert la prise en compte de certains aspects de leurs rapports au monde sublimés par leur culture encore très souvent méconnue et peu considérée. Des élément pouvant s'avérer important pour l'intégration d'un enfant en crèche ou dans n'importe quel lieu.

Aujourd'hui, non seulement les personnes Sourdes doivent fournir un énorme effort cognitifs et comportementale pour s'inscrire dans le monde du travail mais il s'avère aussi que les enfants entendants de parents sourds par transmission culturelle peuvent eux aussi connaître ce genre de difficultés, difficultés au delà du langage. Hypothèse de la transmission inconsciente du handicap chez Achille marqué par de grandes difficultés sociales qu'il explique par sa grande timidité.

Malgré les efforts notable pour l'intégration des personnes Sourdes dans le monde du travail notamment, l'effort est centré sur la communication au sens propre du terme, sur l'apprentissage de la langue de signes par exemple, ou sur l'effort alphabétisation au français écrit des personnes Sourdes. Or la communication comme nous a montré notre étude s'établit bien au delà de la langue l'échange se doit de devenir extra-modal pour maximiser la compréhension entre les protagoniste. Ainsi, tant que l'aspect culturel liée à la langue des signes sera déniée, la communication entre Sourds et entendants restera une situation de handicap et non une situation interculturelle.

Ainsi la psychologie du handicap, dont la psychologie de la surdité pourrait se ranger dans le domaine de la psychologie clinique interculturelle. Nous avons souhaité démontrer cela au sein de notre étude, par la mise en parallèles des apports de la cliniques interculturelles dans la prise en charge variables des situations conflictuelles liées à la surdité.

Nos référentiels théoriques et méthodologiques nous ont permis, de part des expériences de vies singulières, de mettre en perspectives certaines problématiques récurrentes dans ce type de situation interculturelle.

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