

RELOCATION PROCEDURE FOR DUAL CAREER COUPLES:
POLICY AND PRACTICE

by

BARBARA STOKEL PROTZKO

B.B.A., Eastern Michigan University
(1974)

Submitted to the Alfred P. Sloan School of Management
in Partial Fulfillment of the Requirements
for the Degree of

MASTER OF SCIENCE

at the

MASSACHUSETTS INSTITUTE OF TECHNOLOGY

May 1984

© Barbara Stokel Protzko 1984

The author hereby grants to M.I.T. permission to reproduce
and to distribute copies of this thesis document in whole or
in part.

Signature of Author _____

Alfred P. Sloan School of Management
April 22, 1984

Certified by _____

Lotte L. Bailyn
Thesis Supervisor

Accepted by _____

Alan F. White
Director of Executive Education

MASSACHUSETTS INSTITUTE
OF TECHNOLOGY

JUN 11 1984

LIBRARIES

ARCHIVES

RELOCATION PROCEDURE FOR DUAL CAREER COUPLES:
POLICY AND PRACTICE

by

BARBARA STOKEL PROTZKO

Submitted to the Alfred P. Sloan School of Management
on April 22, 1984
in partial fulfillment of the requirements for
the Degree of Master of Science

ABSTRACT

The purpose of this thesis is to evaluate, analyze, and compare the relocation policy of one organization for dual career couples with the actual practice of that policy. Both the policy makers and recipients of the policy were interviewed for actual relocation experience. In the analysis, the employees participating in the study were separated into two groups: those with company-employed spouses and those without.

The organization studied is a large, diversified manufacturing and service corporation whose historical culture emphasizes multiple relocation. The scope of inquiry was limited to dual career relocations to permit a more detailed, specific examination and analysis.

The policy was found to be functional for dual career couples within the organization. The policy did not, however, adequately address the needs of couples who are not jointly employed by the corporation.

The recommendations of this study include an examination of development policies which stress relocation for career progression and establishment of policy modifications designed to meet the needs of dual career couples both within and outside the organization.

Thesis Supervisor: Lotte L. Bailyn

Title: Professor of Organizational Psychology
and Management

ACKNOWLEDGEMENTS

I would like to express my gratitude both to the employees of the JJB Corporation who so generously gave me their time and candor, and to the organization itself for their cooperative spirit in permitting me to interview their employees.

Grateful appreciation must be expressed to Professor Lotte Bailyn for her valuable insight, probing questions, instruction, and guidance in this study.

My thanks also to Professor Phyllis Wallace for her time, interest, and help.

Not least, my deepest appreciation to the two men in my life: to my son, whose arrival in this world two weeks early made possible the completion of this project; and to my husband, Jason, who in 15 months of marriage will have put aside his own career 3 times so that we could relocate and pursue mine. I am most grateful.

TABLE OF CONTENTS

	<u>Page</u>
Abstract	2
Acknowledgements	3
Table of Contents	4
List of Tables	6
 Chapter	
I. Introduction	7
II. Research Approach and Methodology	12
Selection and Background of the Organization	12
Choosing the Methodology	14
Selection and Characteristics of Survey Participants	15
Demographic Characteristics and Analysis	15
III. The Relocation Policy	23
The Policy and its Modifications	23
Underlying Assumptions and Analysis	25
IV. Practice	29
Employee Career History	29
Role of the Employee	29
4.1 Being "Up Front"	29
4.2 Relocation Conditions and Limitations	35
4.3 Saying "No"	40
4.4 Career Precedence	45
The Relocation Experience	46
The Role of the Manager	56
Other Dual Career Issues Raised During Interviews	57
4.5 International Assignments	57
4.6 The "3 in 10 Rule"	58
4.7 "Good Employees"	59
Employee Perception of Intent	59
V. Analysis of Relation Between Policy and Practice	63
VI. Implications and Recommendations	68

Reference Footnotes 72

Appendix

 A. Transcript of Organization Policy Interview 73

 B. Demographic Survey Questions 79

 C. Transcript of Relocation Experiences 80

Bibliography 87

LIST OF TABLES

<u>Table</u>		<u>Page</u>
1	Characteristics of the Employee Survey Group	16
2	Demographic Survey Comparison	17
3	Career History of JJB Employees	30
4	Comparison of Dual Career Relocations	47

CHAPTER I INTRODUCTION

Companies nationwide have, until recently, proceeded with career planning under the assumption that only rarely, and due to extenuating circumstances, will an employee refuse to relocate because of personal or family considerations. And, until recently, that assumption was largely correct. An implied if not explicitly stated condition of corporate success, traditionally, has been the willingness to give one's all for the company, to place the organization's concerns ahead of personal and family considerations. Quite often, for high potential employees, upward career progression involved multiple relocations. Sufficient role models who have relocated and ascended to high levels of management exist in every corporation to reinforce the belief that relocation is a necessity of business life. That organizations have been slow and even unwilling to recognize a growing reluctance to relocate is a product of their culture. After all, those in a position to change the culture made the required sacrifices themselves and are often genuinely baffled by those who refuse to do the same.

Relocation Trends and Implications

The conference board of Catalyst, a non-profit New York-based organization, cites an executive transfer refusal rate of 24%

among firms.¹ For companies that develop executives through a multitude of diverse assignments involving relocation, the implications are enormous. The vitality of the company is threatened by a lack of fresh talent and viewpoint, making long-range personnel succession goals difficult to obtain. Perhaps most importantly, the organization risks losing key, high potential talent if the company is unable to offer career progression without relocation.

Employee Reluctance

The growing reluctance among employees to relocate is attributable to several factors:

- High housing and living costs in the new location.
- Changing social values which place more priority on the family and less on career advancement.
- The rapidly increasing two career family.

Corporate Response

1. Relocation Costs

Since the most frequently cited reason for transfer refusal is financial, especially housing cost, employers have responded with costly relocation packages consisting of mortgage interest differential allowances, cost of living allowances, and other programs designed to "keep the employee

whole" during relocation.²

Relocation packages designed to address the high cost of transfers are costly for the company. The average cost of a move has doubled since 1979 to \$32,000 in 1982. Many companies' costs have tripled to \$45,000, or 104% of the average transferred employee's salary, according to the Economic Relocation Council in Washington.³

Since high potential employees often move four or five times in a career, the quantifiable investment a company makes in an employee increases its desire to retain those key, future executives.

2. Changing Social Values

The values of American society have been modified and in some cases radically changed over the years and now present corporate managers with dilemmas. Research has shown that young people especially are rejecting the success ethic as a central value. In a 1965 study, 8% of the male college students surveyed questioned the value of academic and professional success. The study, repeated in 1971, showed a startling reversal - 77% of the men were questioning success.⁴ What is implied in the increasing trend to refuse relocation is that the previously omnipotent lures of financial rewards, status, and career success may be secondary to personal values, family, and life-style.

One of the more visible signs of a permanent social change is the entrance of large numbers of women into the work force. If current trends continue, by 1990 two-thirds of American women will be working outside the home.⁵ These women in increasing numbers enter the work force with skills and a high level of education. In educational institutions, women now comprise more than 50% of the undergraduate population, 55% of accounting students, 45% of graduate students, over 30% of MBA candidates, and almost 50% of law students.⁶ These women are part of an increasing phenomenon referred to as the dual career couple.

3. The Two-Career Family

There are two types of dual career couples: those couples who pursue careers within one organization and those with careers in different companies or professions. The distinction is important since the career of one member of the family may severely restrict mobility (and often career progression) of the other. Teachers, tenured professionals, doctors, dentists, lawyers, and business owners are, by nature of their profession, nearly prohibited from moving in response to a spouse's career transfer.

At the other end of the spectrum are couples whose careers are within the same company. These couples face the likelihood of a more positive relocation if both are placed at comparable levels in a receiving location. Corporations

are often reluctant to place dual career organization couples due to nepotism practices and fear of discrimination charges by other employees.

Falling in the middle are couples faced with relocation where the trailing spouse is able to relocate but faces a career disruption, a decrease in salary, or relocation to a geographic area offering limited career opportunities.

Unfortunately, companies have largely been reluctant to address the issue of relocation among dual career couples or do so on an exception basis. Some corporations have developed formal procedures and policies which attempt to address the issue.

Objectives

This thesis will compare the formal dual career relocation policy of one corporation with the practice of that policy among its transferred employees. The objectives are twofold:

- To determine whether the policy and its underlying assumptions are met in practice, and
- What, if any, elements are missing.

CHAPTER II
RESEARCH APPROACH AND METHODOLOGY

Selection and Background of the Organization

JJB Industries Inc. was selected by the author for study because of its excellent reputation for proactive employee benefit policies and management. Throughout its history, JJB has established an outstanding reputation for developing its employees and in caring for their personal needs and considerations.

JJB career development is from the "bottom up." According to H. L. Motz, Corporate Personnel Vice President, it is the responsibility of the first line manager to ensure that an attainable development plan is in place for his or her employees. Career plans are discussed and formulated with the employee. Traditionally, through sustained high performance coupled with ambition and demonstrated ability to assume greater responsibilities, the individual is promoted through a series of line and staff assignments. JJB has long considered the career development process to include relocation as a condition of continued upward mobility, and indeed, due to its diversity, managers need exposure to the many facets of corporate business. JJB considers it imperative that its top executives have a broad hands-on knowledge of the corporation's operations. For this reason, JJB in the

past developed a reputation of moving its high potential employees somewhat excessively. Ten relocations in as many years was not uncommon during the peak growth years of 1960 to 1980. In recent years, relocations have declined somewhat and currently number about 5,000 per year or less than 2% of total employment. Employees who are transferred tend to be on a "fast track" with high level executive potential.

To function effectively at an executive level at JJB, employees need to understand corporate operations thoroughly. JJB Industries is an integrated manufacturing and service corporation providing highly technical products to the industrial and non-industrial world. With a net income of over \$2 billion and sales of over \$30 billion, JJB is organized geographically into what the company refers to as "regions." The regions encompass 31 divisions, subsidiaries, and staff functions at corporate headquarters in Chicago. A general regional manager, for example, may be responsible for widely diverse functions such as manufacturing, research and development, and marketing. Since these functions typically are scattered nationwide, relocation for career development has become the norm. Indeed, it is widely understood by employees that geographic transfer is mandatory to succeed.

Within the past few years, JJB executive positions have largely been populated by employees who themselves were the recipients of multiple relocations. Well aware of the

difficulties they faced and hardships placed upon their families, JJB developed several procedures to alleviate some of the burden of relocation. The more innovative plans are:

- The "three in ten" rule: if a promotional opportunity will require an employee to relocate three times in ten or two in five, approval of the divisional president is required. Accompanying this approval is a complete review of all potential candidates to determine if the move could be avoided.
- Flexible and continually updated relocation counseling and reimbursement plans including mortgage differential payments.
- Relocation policy addressing the needs of dual career couples.

Choosing the Methodology

In the early stages of meeting with the thesis project group and advisor, several methods for collecting and recording the experiences of relocated dual career couples were considered.

The interview method, combined with a demographic survey, was determined to be the best approach for gathering individual experiences and career histories. Interviews were conducted by telephone, and all but two interviews were tape recorded with permission of the participants. Two interviews were not

recorded at the request of the interviewees, although extensive notes were taken by the author. All employees who agreed to participate in this study were assured anonymity and were told that their locations and positions would be adequately disguised. All interviews were conducted at the convenience of the interviewees, at their homes, after work hours.

Selection and Characteristics of Survey Participants

The organization selected for study has no data detailing the number of employees with company-employed spouses. JJB Corporate Relocation and Benefits Manager, E. J. Barnes, agreed to allow employees to be interviewed; however, the author would have to locate employees who were both recipients of relocation policy and members of dual career families.

Nine JJB employees were interviewed for this study. The employees were selected through personal contacts of the author, one interviewee often recommending another. Characteristics of the employees are presented in Table 1.

Demographic Characteristics and Analysis

Pertinent data from the participants' demographic surveys are presented in Table 2. The data have been segregated to reflect the responses of employees with a JJB-employed spouse versus those with spouses employed outside the company. It

Table 1

Characteristics of Employee Survey Group

<u>Employee</u>	<u>Sex</u>	<u>Marital Status</u>	<u>Years With JJB</u>	<u>Number of Relocations Made</u>	<u>Position</u>	<u>Spouse's Occupation</u>
1	F	M	15	2	Marketing Staff	Special Assignment*
2	F	M	15	4	Administrative Assistant	Divisional Director*
3	F	M	16	3	Executive Assistant	Systems Analyst
4	F	M	14	3	Plant Manager	Consultant
5	F	M	22	1	Divisional Manager	Divisional Manager*
6	F	M	11	4	Zone Manager	Manager, Securities Firm
7	M	M	8	2	Zone Manager	Engineer
8	M	M	20	3	Chief Engineer	Programmer*
9	F	M	15	3	Systems Manager	Design Manager*

*Indicates spouse employed by JJB.

Table 2
Demographic Survey Comparisons

	<u>Employees</u>									
	<u>With JJB-Employed Spouse</u>					<u>Without JJB Spouse</u>				
Sex	F	F	F	M	F	F	F	F	F	M
Years with JJB	15	15	22	20	15	16	14	11	8	
Number of relocations	2	4	1	3	3	3	3	4	2	
Relocations per year	.13	.27	.05	.15	.20	.19	.21	.36	.25	
Spouse employed	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Full-time	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Part-time	No	No	No	No	No	No	No	No	No	No
Spouse employed by JJB prior to last relocation?	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No
Spouse offered JJB Job?	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No
Policy reviewed prior to relocation?	No	Yes	No	Yes	No	No	Yes	Yes	Yes	Yes
Use of placement firm	-----	Not applicable -----				Yes	Yes	Yes	Yes	Yes
Currently commuting?	No	No	No	No	No	No	No	No	Yes	
Would consider commuting	Yes	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes
\$500 is sufficient?	No	*	*	*	*	No	No	No	No	No
Anticipating future transfers	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Should commuting expenses be reimbursed?	Yes	Yes	Yes	*	Yes	Yes	Yes	Yes	Yes	Yes

*Have never used this benefit and could not express an opinion

was determined that throughout this study segregation, where applicable, would provide a valuable tool to facilitate analysis of the policy and its application.

Analysis

It appears, based on the number of relocations made, that employees with non-JJB-employed spouses move more frequently than dual JJB couples. This might be attributed to a greater degree of awareness among staff and divisional managers of who the dual JJB couples are. The indication is that frequently relocated employees tend to be on a "fast track," and this identification might also make the identification of an employee's spouse easier. If managers are aware of those couples jointly employed by JJB, those couples may be asked to move less often simply because it is easier for the company to place an employee whose spouse is not employed by JJB and does not require priority placement.

The fact that none of the non-JJB-employed trailing spouses was offered a JJB position would support this position, although all of the JJB-employed trailing spouses were placed in the new location.

The danger in this conclusion is that employees with JJB-employed spouses may forfeit opportunities in new locations or miss important developmental assignments if an assumption is made by a manager that an opportunity does not

exist for the spouse at the new location. The implications are alarming in an organization such as JJB which stresses upward career progression through geographic relocation.

Interestingly, 3 of 5 employees with JJB-employed spouses reported that JJB's relocation policy for dual career couples was not reviewed with them prior to the relocation, while 3 of 4 of the employees with spouses not employed by JJB reported that they were informed of the policy prior to relocation. Managers responsible for initiating the transfer may erroneously believe that all employees are aware of the policy.

Couples employed by JJB may enjoy greater bargaining power than employees whose spouses are not employed by JJB. High potential employees often know their worth and may decline a career transfer which offers no opportunity for the JJB-employed spouse. Only 2 of the participants with JJB-employed spouses would consider commuting as an alternative under such circumstances (although the policy does not address commuting expenses), while all of the employees with non-JJB spouses reported they would consider commuting rather than relocating. These responses indicate that employees are equally concerned over career opportunities for the trailing spouse, although employees without JJB-employed spouses may be willing to make additional sacrifices associated with commuting. Whether managers initiating transfers are aware

of a willingness to commute cannot be determined, although it may partially explain why employees with working spouses not employed by JJB are transferred more frequently. Despite a reluctance to consider commuting as an alternative, all employees interviewed expressed the belief that commuting expenses should be at least partially reimbursable, particularly when the transfer is of a short duration or initiated by JJB. It is apparent that, regardless of the employment position of a trailing spouse, employees are aware of the potential difficulties and expenses in relocating and have already made decisions regarding this potentiality.

Participants in the survey were 78% female. While it may appear encouraging that more and more females enjoy upward career progress, that progress is being attained through traditional methods of geographic relocation. The culture long established at JJB for multiple relocations was based historically on the one career family with the female as the trailing spouse. Of the seven women participating in this study, four have husbands employed by JJB. While statistically not overwhelming, these data do raise the question of what may be a trend toward relocating women whose husbands enjoy a JJB career. Although not indicated, a common assumption is that a working husband will not relocate for his wife; hence, women may be denied career opportunities. For one transferred employee whose transfer to a severely depressed geographic area presented virtually

no career opportunities for his wife, commuting represented a more practical choice, yet the employee himself was allowed to make the decision.

Although none of the employees with JJB-employed spouses required reimbursement of expenses for job counseling or placement, only one indicated that current policy of reimbursement up to \$500 is insufficient. All of the employees with a non-JJB-employed spouse felt that \$500 is inadequate. One respondent indicated that placement fees, if not paid by a new employer, "can run as high as \$10,000." A second employee responded that, although \$500 is not sufficient, "at least it's something." Another employee indicated that the definition of expenses reimbursable might be too narrow. She believes that "JJB should share in the expenses of relocating a self-employed spouse's business: cost of installing a business phone, disconnecting the old business phone, new business cards, letterhead and associated expenses." Still another transferred employee felt that initial child care expenses should be reimbursed until other arrangements can be made, indicating that "day care facilities are at a premium in many cities. You can't just move and enroll in one. You often have to wait weeks or months. In the meantime, child care by the day from an agency is very expensive." It is interesting to note that these responses came from both groups of employees. It is also interesting to speculate on whether as many career

relocations would be made if JJB paid all costs associated with the move such as those suggested by its employees. Faced with a job placement fee for a trailing spouse of several thousand dollars or a similar amount in commuting and temporary living expenses, JJB might rethink the necessity of multiple relocations or simply decline to consider such employees for transfer.

CHAPTER III
THE RELOCATION POLICY

Early in 1981, JJB Corporation Relocation and Benefits Manager E. J. Barnes began to receive feedback from regional locations that a growing concern among employees existed regarding mobility for dual career couples. In keeping with corporate desire to maintain a proactive package of employee benefits, JJB executives formally documented and modified into corporate policy* what had long been a standard operating practice among most of its managers.

The Policy and its Modifications

- When approached to relocate, employees will be asked if their spouses are employed by JJB or another firm.
- If the spouse is employed by JJB, as a trailing spouse he/she will be entitled to preferential hiring treatment at the receiving location for up to six months. (Note: prior to the formal policy, preferential hiring was not formally practiced, although attempts were made to place the spouse.)
- The trailing spouse will receive on-the-job training for

*For purposes of this study, that which JJB refers to as "procedure" will be termed "policy."

positions which he or she might fill if a need does not exist for present skills.

- Normal placement consideration will be given for a period of six months after priority placement, with a leave of absence if necessary. The employee will retain credited service and benefits.
- The trailing spouse is entitled to reimbursement of up to \$500 for job counseling, resume preparation, or placement fees if JJB cannot place the spouse.
- If the trailing spouse is not employed by JJB, normal placement consideration will be given, and the spouse may be reimbursed up to \$500 for job placement expenses.
- The trailing spouse must be employed prior to the spouse's transfer.
- The policy applies to all positions.
- The policy applies only to domestic operations.

The policy as stated was derived from an interview between the author and Mr. Barnes. The purpose of the interview, conducted at JJB headquarters in December, 1983, was to review not only the policy but the intent and underlying assumptions of its development. A complete transcript of the interview is provided in Appendix A.

Underlying Assumptions and Analysis

Clearly, JJB's intent in developing its relocation procedure was to maintain its proactive employee benefits position and to address employee concerns, while maintaining career development through relocation. There is no indication that JJB has modified its traditional emphasis on geographic relocation. Rather, it is seeking ways to make the relocation more attractive to its high potential employees.

According to Mr. Barnes, "If it is possible to give an employee adequate career development without relocation, we always try and do so, not just because of dual career couple considerations but also because of the expense associated with relocation and in response to the family." However, most JJB employees do move for career development reasons. Relocation for career development purposes sometimes involves a promotion, but not always.

Do JJB employees understand that continued advancement with JJB to upper management levels requires relocation? Although not stated as an absolute requirement, Mr. Barnes feels that "certainly high potential employees understand this. We have thirty-one divisions at JJB - no one can get a significant overview of the corporation without exposure to our different functions and operations." The underlying assumption here is that employees cannot be adequately developed without relocation and that unless managers have experienced various

operations, they might be less than effective managers.

Although there is no indication that JJB has lost its potential executives as a result of inability to relocate, the cost of not addressing the issue according to Mr. Barnes has serious implications. The "cost of doing nothing" is the "inability to develop executives, losing high potential employees, not recognizing change and getting a reputation with our employees for it." In this respect, the cost of implementing a policy which seeks to address these issues is minimal. JJB considers the development of its high potential employees to be a "major investment," and the associated cost of reimbursement of expenses is miniscule when compared with potential alternatives.

Placement of a JJB-employed spouse at the receiving location has long been a practice but not a formal policy. Priority placement consideration does not apparently create inter-divisional problems with regard to head count restrictions. For JJB, this is a "JJB problem, not a divisional problem. Concessions are made if a hiring freeze is in effect. After all, from a corporate point of view, a trailing spouse is still a JJB employee." In contrast, a trailing spouse not employed by JJB may receive less than comparable concern if a hiring freeze prevents him or her from receiving "normal consideration." Due to the varied careers a spouse may be engaged in, preferential hiring treatment for all spouses is

not realistic, nor is it applicable to those spouses with careers not related to JJB. Teaching positions, medical professions, and self-employed professions are all examples of valuable careers for which there simply is no position in JJB. However, an assumption is made in dealing with trailing spouses in a different manner than a spouse not employed with JJB is not JJB's concern beyond \$500. Quite the contrary, it is the stated concern of JJB management to develop and retain high potential employees. JJB is just as likely to lose key potential executives with non-JJB-employed spouses as those with JJB-employed spouses if a move is unpleasant for, or penalizes, the spouse.

Is it acceptable to say "no" to a relocation offer at JJB? Based on the emphasis placed on development through historical channels involving relocation, probably not. This is not to say that declining a job transfer once or even twice will stagnate one's career with JJB. In addressing relocation for dual career couples, however, JJB has not addressed the problem of developing those high potential employees who are unable to move due to the career of a spouse, or potential loss in income associated with a relocation which offers limited opportunities for the spouse. In this respect, the assumption is still being made that employees know they must transfer to progress, that certain employees cannot develop without relocation, and that multiple moves are still a necessary part of the corporation's

culture.

Assuming that employees know they must relocate to progress beyond mid-management levels, what vehicle exists which ensures that employees are fully knowledgeable of the benefits available to dual career couples? According to Mr. Barnes, each divisional personnel director wrote a memo to employees detailing the policy in April, 1982. It is also the responsibility of the relocation counselor in each division to review the policy with employees who are requested to relocate. Referring to Table 2, the data contained therein show that fully half of the employees surveyed did not receive this counseling. No vehicle exists to insure that employees actually receive counseling, although Mr. Barnes does have verbal indication from the field that concerns over dual career relocations have largely abated. An untested assumption might be made that the policy "works."

That assumption will be tested in the following chapter.

CHAPTER IV

PRACTICE

Employee Career History

Table 3 represents the career progression of the participants of this study. For purposes of comparison, the participants have been segregated according to those with JJB-employed spouses and those without. Line and staff positions have been noted along with positions requiring relocation.

One employee from each group does not have staff experience to date. It appears that JJB's emphasis on both line and staff experience is a reality in career progression for all but two of the participants. In all of these cases, the move into a line or staff position required a relocation.

Role of the Employee

4.1 Being "Up Front"

"I think, if you're on a fast track, and most people who are relocated are, that you owe it to yourself and the company to let them know where you stand - if you're mobile or not. If you have location restrictions or a spouse with a career, then the company needs to know those things. Otherwise, you and the company will be planning divergent career paths."

"We were very much open with our management that if we did

Table 3

Career History of JJB Employees

<u>With JJB-Employed Spouse</u>		<u>Without JJB-Employed Spouse</u>	
<u>Employee #1</u>		<u>Employee #3</u>	
First level manager	(L)	Programmer	
Zone manager	(L)*	Marketing manager	(L)
Executive Assistant	(S)*	Sales manager	(L)*
		Zone manager	(L)*
		Executive assistant	(S)*
<u>Employee #2</u>		<u>Employee #4</u>	
Administrative secretary		Sales representative	
Sales trainee		Zone manager	(L)*
Sales representative	(L)*	Executive assistant	(S)*
Administrative assistant		Assistant divisional	
- executive	(S)*	director	(L)*
<u>Employee #5</u>		<u>Employee #6</u>	
Engineer		Engineer	
Engineering manager	(L)*	Systems manager	(L)*
Marketing staff	(S)	Zone manager	(L)*
Regional staff	(S)		
<u>Employee #8</u>		<u>Employee #7</u>	
Engineer		Engineer	
Manufacturing engineer	(L)	Marketing staff	(S)*
General supervisor	(L)*	Marketing manager	(L)
Chief engineer	(L)*	Zone manager	(L)*
<u>Employee #9</u>			
Programmer			
Supervisor	(L)*		
Research and development	(S)*		
Systems manager	(L)*		

*Positions requiring relocation

(L) Line responsibility
(S) Staff responsibility

relocate we really needed to find two positions of a high level that would match our career aspirations." "For example, at this point in time I would not relocate due to personal reasons, and I've told my management, 'Don't consider me for the jobs that might come up that are physically not right in Chicago.'"

"I don't want to be in the position of having to turn down a transfer because the location offers limited opportunities for my husband. So I've always let my managers know what my restrictions are."

These comments from three JJB employees emphasize the growing need for face-to-face discussion between managers and employees at all levels for effective career planning regarding relocation. All of the employees interviewed, both with and without JJB-employed spouses, indicated their own conditions or limitations (if any) had been expressed to their superiors. Through the telephone interview, it became apparent that JJB employees have little or no fear of career stagnation because of their dual career status, nor have they experienced negative reaction to relocation restrictions. However, all these employees who were interviewed are considered high potential employees in whom JJB management has considerable investment.

All of the employees interviewed have relocated in the past, and all are at or above mid-management levels. Is it as easy

to be "up front" in an organization such as JJB if an employee is aspiring to enter management? The fact that all participants in this study relocated to assume their first management position would indicate that the unwillingness or inability to relocate at that point might restrict career progression. When this was posed to the employees interviewed, responses were nearly identical:

- "We're in a position right now in our careers that they (JJB) want us both very much to stay in the company. Maybe they will accommodate us. I'm not so sure at a lower level in the organization that they would accommodate us."

"There are a lot of candidates (for first level managers), and the company is not as willing to look at what they can do for both members of the family as opposed to just one member of the family."

- "There are quite a lot of talented people, and if one person won't move, then someone else will (regardless of level)."
- "There can be a situation where if a person is unwilling to relocate they may not be able to maximize their potential. That does not mean that they won't continue to improve their position, but they may not get, for example, the broadening experience that they might need if they wanted to reach an optimum level. Specifically, that tends to

occur when a person is unwilling to relocate to take a divisional or headquarters kind of job. There is only so much you can do in a company without having had some kind of basic experience in a headquarters kind of environment."

- "In order to get to the higher levels, you pretty much have to go where the opportunity tells you to go."
- "I rejected my first physical transfer into management because I was getting married shortly. My manager handled it very well, but my husband and I know we can't turn down the next offer that requires relocation - not if my career is going to progress."
- "(Line and staff) jobs are not in all cities - they are only in divisional cities or headquarters - and if you happen not to be in one then you know you have to move or you can't get to that next level of management."
- "I think it's clearly understood that refusing to move at all has a negative impact on your career - not at a higher level, but at that first move into management. While the company may be sympathetic with an employee's situation, our structure is such that you just can't go very far."
- "If they are capable (declining an offer to relocate). When I had to move from Atlanta, I specified where I wouldn't move then. I said I positively would not move west of Chicago." (Note: this employee did not state that

she could not or would not move, only that she would not move beyond Chicago.)

Clearly, all JJB employees, with and without JJB spouses, share similar perceptions regarding career progression through relocation:

- All perceived a career penalty associated with the inability to relocate at the early stages of a career with JJB. The career penalty may be in the form of a lack of opportunity, the absence of broad, developmental experience essential for upward progression, or career stagnation. An unexpressed penalty might also be that the employee's manager ceases to consider the employee for further advancement or relocation.
- All the employees themselves relocated to attain a management position.

As mid-level managers and above, the JJB employees interviewed are role models themselves of the "move to advance" ethic in the organization's culture. As a role model, the necessity for others to relocate might not be questioned by the employee, nor might employees aspiring to enter management make their relocation limitations known to those managers who themselves have relocated.

- All clearly believe relocation is essential in the initial

stages of a JJB career.

Despite the diversity of career fields (engineering, manufacturing, marketing, financial), none of the employees suggested that relocation might not be essential in gaining multiple experiences in their fields.

At no point in time during the interviews did any JJB employee suggest that high potential employees unable to relocate (as opposed to unwilling) might gain developmental experiences through other channels not requiring relocation. Implied herein is the deeply rooted JJB assumption that executives must have exposure to all facets of the business. The nurturing of this assumption throughout the JJB organization has alarming implications for those dual career who, by virtue of a spouse's occupation, are unable to relocate. Important opportunities may be missed, and the organization may lose talented employees.

4.2 Relocation Conditions and Limitations

The employees in this study were asked to relate their own experiences in placing conditions on relocation or geographical limitations. For purposes of evaluation, these employees have been separated into two groups, those with JJB-employed spouses and those without.

RESPONSE TO RELOCATION CONDITIONS: JJB EMPLOYEES WITH
JJB-EMPLOYED SPOUSES

- "We would be looking for not only just ability to compete for a job, but we would both want jobs of a comparable level."

"I don't think either one of us would accept a position in a company before we knew what the other individual would be doing and what that level would be and what the career opportunities (would be) for that person."

- "There are so many opportunities here (headquarters) that we don't feel that we would face a move situation again unless it were a European assignment..."
- "I would say a restriction would come in the framework of whether there is a good job opportunity for both of us, as opposed to a geographic restriction."
- "If the transfer were not of positive career growth potential for myself or my wife (I would not transfer) or if the potential transfer was to a climatic area that I would not want to go to."
- "If there weren't jobs offered to both of us, at least equal to the jobs we had. Maybe an advance for one and a lateral for the other; that's fine."

Of the employees with spouses employed by JJB, 4 of 5

specifically stated a comparable level for the spouse and career growth opportunities for both members of the couple as a condition of relocation. Contrast this element of primary concern with the responses of non-JJB dual career couples who stress the importance of large, urban areas as a primary concern. Only one employee in this group specified progression for the spouse as a condition of relocation. The question must be raised, are dual JJB couples able to place this condition on relocation because of their dual career status? Do they feel it is the corporation's responsibility to provide a favorable career plan for the trailing spouse as well as the employee? Apparently so, according to JJB employees with JJB spouses. Employees with spouses employed outside the corporation as a group expressed the belief that JJB is not responsible for the careers of their spouses.

RESPONSE TO RELOCATION CONDITIONS: JJB EMPLOYEES WITH
NON-JJB EMPLOYED SPOUSES

- "I think it's probably easier for JJB dual career couples to place restrictions on their mobility than for those of us whose husband or wife does not also work for the company. However, in my situation, I had to tell my manager that my relocations would have to be in an urban area, preferably a large city, due to my husband's work, but aside from that restriction we are able and willing to relocate for career growth."

- "Well, I can remember there was one time when it would have been inconvenient for my husband to move. So I just made sure that I didn't get offered a job at that time. I just said that I wasn't interested in moving then. I said that I positively would not move to Des Moines. That's partly because that is difficult for my husband, but I just don't have any desire to live in Des Moines."

- "I only accept moves if my husband can move up at the same time. If he can't seem to find the right kind of opportunity, or if he even thinks he is not going to find the right kind of opportunity, then I wouldn't accept it."

"Yes, I wouldn't move, and I think all of my management understood that, if it turns out that my husband did not feel that the area provided the right kind of opportunity for him. And I wouldn't accept a job in that area."

"I've always wanted to move to a major metropolitan area which offers more opportunities for my husband. The other thing is to move to an area where he wouldn't have to go to work for a competitor, for example. I don't think that would be a good family life."

- "Unfortunately, because of a depressed job market in my wife's field, I've had to specify geographic areas which I cannot move to now. We're currently commuting because of this situation, although we don't regret the decision."

This is not to say couldn't move anywhere in the future - it just depends on the field my wife is in opening up a little more as the economy improves."

It is evident from the responses of JJB employees that dual career couples as a group place restrictions and limitations on their mobility because of the career of a spouse.

However, JJB-employed spouses may have more bargaining room in demanding concessions or placement for the spouse. As one employee stated, "If the company wants you badly enough, they will take care of your spouse, too. The company does not want to risk losing its high potential people by not responding to the career of the spouse who also happens to be a JJB employee."

It is important to note the perception of one employee that "it's probably easier for JJB to place restrictions on their mobility." If this employee's statement is true, greater ease in making relocation conditions may be a result of the JJB managers' awareness of who the dual career couples are and what their restrictions are. Thus they are able to plan joint relocation offers. It is equally important to note the danger of managers assuming a paternalistic position regarding relocation decisions. Because of the very restrictions dual JJB couples place on transfer, managers might make the decision not to offer a transfer to those employees, instead of allowing the couples themselves to

decide. This could very well be the case considering the identified trend that non-dual JJB couples are relocated somewhat more often.

4.3 Saying "No"

In a corporate culture such as the JJB Corporation, which stresses upward mobility through geographic relocation, is a career penalty paid by those who decline? As noted earlier, in the eyes of those who have already moved, declining a geographic transfer in the early stages of an employee's career is perceived to have a negative effect on the overall career progress. Of the dual career couples studied, only JJB employees with non-JJB employed spouses have declined transfer offers.

Among JJB employees with JJB spouses, only one of the employees specifically stated to her manager, "Don't consider me for jobs that might come up that are physically not right in Chicago." Comments of this type serve two purposes:

- The employee has placed himself in the peculiar position of declining a potential relocation offer without having it appear so.
- The JJB manager becomes aware of additional relocation restrictions.

Employees with JJB spouses were asked to speculate on any

career penalty which might be paid as a result of declining a transfer offer:

- "I think ten years ago you probably could have said that (no), and they could have said, 'Fine, you don't get another chance.' Well, I think we are starting to change that mentality. For one reason, the people are saying, 'I don't want to move.' And for two, I think we are seeing that we've had a lot of costs in moving people, and I think there are a lot of personal problems with families that have moved so many times. They are more sensitive to that."
- "Yes, it might hurt. But the interesting thing is that more and more today, because of the higher cost of living, the cost of moving people, more and more people are deciding not to move, and the company has had to face this kind of decision from a larger percentage of the population... although there are always people who will move."
- "...I think it becomes clear, for instance, if you are in a remote zone location, where there is no divisional headquarters or anything else, that if you are unwilling to move, it is basically impossible for you to have a job other than in the zone office."

Although these employees have not declined a relocation, as a

result of being "up front" and placing restrictions on their mobility, they have placed themselves in a position where they do not have to say "no," because the offer is not made. These dual JJB couples are known commodities to JJB management, and in all probability receive relocation offers which correspond to their preferences and dual career aspirations. In an organization which rewards mobility, it would appear to be quite important that high potential employees do not have a record of relocation refusal. If this is the aim, then the objective is met by insuring that a relocation offer is not made.

It is interesting to note that while 2 employees referred specifically to a trend of refusing transfers among the general population, and management sensitivity to that trend, the recurring theme which followed is "move to advance."

JJB EMPLOYEES WITH NON-JJB-EMPLOYED SPOUSES

Three out of four JJB employees with non-JJB-employed spouses have declined transfer offers in the past. These employees indicate a perceived career penalty if they do not transfer subsequent to the refusal. When asked to explain any career price they may have paid, these employees responded:

- "I don't think there is any question that you can work at JJB and spend your entire career even in Cook County, but you definitely limit yourself."

"Let's face it, once you get to a certain level, you didn't have to leave. I know of several people who were asked to move who just said no."

- "No, I don't think so at all. I was offered a job and turned it down. A month later, I was offered the same job in another city."

"And everyone knows and everyone's told that the way you progress in JJB is to start off at the bottom, you work your way up, you go through a staff assignment, and then you go to your first management job. Then you go to a staff assignment job, and then you go to your next management job. No one ever really articulates it, but everyone knows."

"I spent the first eight years of my career in one city. If I had not accepted a transfer out of that city, it would have had a very negative effect on my career."

- "I declined a transfer because I was to be married shortly. However, you can't turn down two moves. You couldn't get the necessary experience any other way."
- "I turned down one relocation offer for the same reason I'm now commuting - because of my wife's profession. Although no one actually said anything, I felt it would not be in the best interest of my career to turn down a second offer."

For an employee whose spouse is not employed by JJB, there exists a very tangible reluctance to decline a relocation offer more than once. These employees perceive a career penalty associated with declining a transfer. Of the 3 employees without JJB-employed spouses who declined relocation offers, none was offered alternative methods of development not requiring relocation, nor did any of the employees question the necessity of relocation at a subsequent date.

Why have non-dual JJB couples been faced with "saying no" while couples both employed by JJB have not? Given that non-dual JJB couples tend to move more frequently, that progression for the spouse is not a condition of relocation, and that it is certainly easier and requires less planning to relocate one employee, it is highly likely that:

- Managers and the organization are aware of who the dual JJB couples are.
- Managers are unaware of employees with career spouses outside the company, and what their careers are.
- Dual JJB couples are asked to relocate only when the relocation satisfies previously stated conditions.
- Relocations are probably offered to single JJB career employees more often. The decision not to offer a transfer to a dual JJB couple may be made in advance by some managers who believe the offer might be declined or

might not meet the needs of the couple.

Clearly, it is understood among both groups of employees that traditional advancement through line and staff positions requires relocation during the employees career and that the prospect of a career penalty is always present for those who decline. Until such time as JJB equally rewards those who do not move, a certain stigma will tend to be attached to "saying no."

4.4 Career Precedence

A common method dual career couples have developed for dealing with relocation decisions is to make a career priority decision. In this process, the couple consciously determines which person's career will take precedence if asked to relocate. Among the JJB employees interviewed, only two couples have made a decision to give priority to a spouse's career (male). However, one employee stated, "We also made a decision that we wouldn't move into a situation that would put me into an environment that would be undesirable." The remaining couples, both with JJB-employed spouses and without, appear to "evaluate each opportunity independently," as one employee stated.

The ideal situation, of course, is one in which dual career couples do not have to make a career precedence decision. This entails careful, long-term planning on the part of the

manager, open discussion with the employee, and a rethinking on the part of both management and employee of the necessity of relocation.

The Relocation Experience

Table 4 summarizes, for comparison purposes, the relocation experiences of JJB employees studied as well as the experiences of the trailing spouses. A complete transcript of the experiences is presented in Appendix C.

Employees with JJB-employed spouses are vaguely aware of the provisions of the relocation policy, although 4 of 5 are unaware of the policy's details. On the other hand, employees without JJB spouses, as a group, are well aware of the provisions and the details of the policy.

Several conclusions may be drawn from employees' awareness:

- All employees are not aware of the policy. Certainly all managers are not aware of the policy since the participants of this study are all mid-level managers and above. This has serious implications, since these very managers who are recipients of the policy are also the managers responsible for insuring all employees are aware of the policy.
- Employees with a JJB-employed spouse may not feel the need for a formal policy directed at them. In part, this may be the result of JJB's long-standing practice of placing the

Table 4

Comparison of Dual Career Relocations

	<u>Employees with JJB Spouse</u>	<u>Employees without JJB Spouse</u>
How employee knew about policy	<ul style="list-style-type: none"> - Not really aware - Awareness through moves - Not aware of details - Not are of details - As a manager 	<ul style="list-style-type: none"> - Manager's manual - As a manager - Employee bulletin - Manager's manual
Given pre-move counseling	<ul style="list-style-type: none"> - No, didn't require - Yes - Not required - Not required - Not required 	<ul style="list-style-type: none"> - Not required - Yes - Yes - Yes
How approached to relocate	<ul style="list-style-type: none"> - Joint offer with spouse - Joint offer with spouse - Joint offer with spouse - Employee initiated - Joint offer with spouse 	<ul style="list-style-type: none"> - Promotional - Promotional - Promotional - Promotional
Sufficient time to consider	<ul style="list-style-type: none"> - Varies; needs time to evaluate - Time not a problem - No response - Not applicable - Time not a problem 	<ul style="list-style-type: none"> - Not enough time - One week - One week - insufficient - Not enough - prefers 4 weeks
Relocation positive	<ul style="list-style-type: none"> - Yes - Yes - Yes - Yes - Yes 	<ul style="list-style-type: none"> - Yes - Yes - Yes - difficult for spouse - Yes - wants help with commuting
Does policy make a difference?	<ul style="list-style-type: none"> - No difference - Placement always a practice - Security measure - No difference, always a practice - Placement always a practice 	<ul style="list-style-type: none"> - Not of value to non-JJB - Not a big deal - Not for non-JJB couples - Not for non-JJB couples
Spouse offered JJB position?	<ul style="list-style-type: none"> - Yes - Yes - Yes - Yes - Yes 	<ul style="list-style-type: none"> - No - No - No - No - No
What happened to spouse?	<ul style="list-style-type: none"> - Promoted - Promoted - Better opportunity - Lateral transfer - Promoted 	<ul style="list-style-type: none"> - Lateral relocation - Self-employed - Lost wages - Commuting

trailing spouse. It may also be a result of actually being faced with fewer relocation offers than non-dual JJB couples.

- Of the employees without JJB-employed spouses, 3 of 4 are aware of the policy through their positions as managers. As a group, these employees were far more aware of the details of the policy and appear to have made it a point to review the relocation provisions applicable to dual career couples.

Four out of 5 JJB employees with JJB-employed spouses stated that they relocated simultaneously with their spouses and have never been in a position to utilize the relocation policy. The fact that the same 4 couples were offered transfers simultaneously would indicate that:

- JJB managers are aware of who the dual career couples are.
- Planning had taken place prior to the relocation offer which insured spouse placement without career setback.

It is important to recognize the element of forward planning which must have taken place for 4 couples to be offered transfers simultaneously. The fact that 3 of 5 trailing spouses received promotional or "better opportunities" suggests a degree of planning not apparent in the experiences of non-JJB couples. What is also indicated is an awareness

on the part of JJB managers that relocating dual JJB couples requires more planning than non-dual JJB couples. However, since all of the employees without a company spouse were asked about the spouse's employment status at the time the relocation offer was made, the conclusion may be drawn that JJB managers are unaware of employees with a career spouse outside the company and, as a result, do not plan to allow the employee sufficient time to evaluate a relocation offer. This conclusion is supported by the fact that all of the employees without a JJB spouse indicated that the time between offer and acceptance was insufficient, while none of the dual JJB couples indicated time to be a concern.

It is evident that the relocation offer itself is presented in the same manner to employees with and without JJB spouses. The difference is in the degree of planning which takes place prior to the offer for one set of employees. Given the promotion for the employee, and promotion or "better opportunities" for the trailing JJB spouse, it is not surprising that employees with JJB spouses do not consider the time allowed between offer and acceptance to be of major importance. These couples face no career setback, loss of income, or possible commuting expenses, elements which non-dual JJB couples must consider in evaluating a relocation offer. These elements cannot be adequately evaluated in one week or less, which appears to be the average allotted time between offer and decision. Dual JJB couples must simply

decide if the opportunities presented to both members are in line with their own career and life-style objectives.

Although all the JJB employees in this study reported positive relocation experiences, employees with non-JJB career spouses were somewhat less enthusiastic. Two employees expressed a desire for reimbursement of commuting expenses, particularly when the move is of short duration or for developmental purposes. One employee expressed the belief that initial child care expenses should be reimbursed by JJB until arrangements can be made which duplicate those in the former location. The point which is raised by these comments is that although JJB employees are willing to relocate to advance their careers, there are costs associated with the relocation which go unrecognized and which are borne by the employee whose spouse is not employed by JJB. Temporary loss of income, career stagnation, and lost opportunities for the spouse are examples of both visible and hidden costs which dual JJB couples may not face.

Some of these hidden costs could be prevented if the same degree of forward planning for dual JJB couples is extended to the employee with a career spouse employed elsewhere. In this context, planning refers to the length of time necessary to arrange relocation offers for both members of a JJB dual career couple. If the same amount of time were given to the one-JJB career couple to adequately evaluate job

opportunities for the spouse in the new location, much of the cost of relocation shouldered by the employee might be eliminated or avoided. That JJB employees without JJB spouses are willing to relocate despite financial penalties which might be incurred is indicative of:

- The strong corporate ethic which rewards relocation with progressively higher level positions.
- The equally strong bias associated with saying "no."

Employees both with and without JJB spouses are acutely aware of the career penalties associated with declining multiple relocations. In this respect, although the corporation may present an environment which accepts the declining of a transfer, the mechanism by which employees are evaluated for higher positions makes no allowance for development without relocation.

A most significant result of the interviews with JJB employees is that none of the dual JJB couples considers the corporation's relocation policy to be of any major significance. None of the employees in this group indicated in any way that a formal policy addressing dual career couples made a difference in their relocation or career plans. Several employees made a point of stating that placement for the trailing spouse has always been a practice at JJB. As a group, employees with JJB spouses indicated that the

development of a formal dual career relocation policy was designed to address relocation concerns of those couples not jointly employed by JJB.

And yet, the relocation concerns of JJB employees without JJB spouses appear not to be addressed by the policy at all. Career planning which incorporates the career of the spouse, sufficient time to thoroughly evaluate relocation offers, and development within geographic limits are the elements of relocation concern which surface repeatedly. The policy itself addresses none of these issues, and, indeed, employees whose spouses are not employed by JJB consider the policy to be applicable only to dual JJB couples! Three of 4 employees without JJB spouses specifically stated that the policy is of "little value to non-JJB dual career couples." The fourth employee simply stated, "I don't consider it to be a big deal."

What is peculiar is that among two groups of dual career couples, each perceives JJB's relocation policy as applicable to the other group and not their own. If the policy in practice applies to neither group, whom does it apply to? Most likely, to all employees in general and none in particular. Granted, the fact that a policy exists speaks well for JJB, but in practice it does little more than provide an element of security for dual JJB couples.

The policy as developed by JJB confronts the relocation issue

of dual career couples but stops short of providing alternatives and solutions which meet employee concerns head-on. It is good to state that trailing spouses will be considered for "normal placement," yet none of the trailing spouses (non-JJB) in this study was offered a position. It should be noted that such placement consideration for spouses at a managerial level is nearly impossible to implement in an organization which develops its managers from within.

From the experiences of the relocation, it is apparent that, although all employees interviewed are pleased with the relocation, employees with JJB spouses are more pleased. It is not difficult to understand why after examining what happened to the trailing spouse:

- * Employee #1 Spouse was promoted to a developmental staff assignment in the new location.

- * Employee #2 Spouse promoted to divisional director in the new location.

- * Employee #5 Spouse offered a "good opportunity" for development in a different division, hence gaining the important hands-on experience valued by JJB.

* Indicates trailing spouse and employee offered joint relocation.

Employee #8 Employee initiated transfer resulting in the geographic location desired. Spouse transferred laterally.

* Employee #9 Spouse offered a "better opportunity" for future promotions in a different division.

Four out of five transfers resulted in a better opportunity for the trailing spouse. One employee added: "I honestly believe that the company looks at both of them (dual career JJB couples). It was time for each of them individually to be promoted, and they did it on their own. I don't think the policy would have made any difference to either one of them. It's only when each is not on the same fast track."

If in fact JJB management is promoting high potential couples, then this behavior speaks highly for JJB managers. It is far more difficult and time-consuming to career path a two-career couple than one. Whether or not these couples do in fact have simultaneous, joint career paths cannot be determined.

Although the employees with spouses employed outside JJB were quite satisfied with their relocation, they were not as satisfied. The careers of the trailing spouses did not progress as a result of the move:

Employee #3 Spouse relocated in same field. Trailing spouse retained former job until new position located. Couple commutes during interval.

Employee #4 Spouse self-employed; relocated company.

Employee #6 Spouse relocated laterally but had to change employers to get comparable position and lost two months salary. Spouse found position through agency; employer paid fee.

Employee #7 Spouse remained in old location. Could not locate a job in new area. Couple currently commuting.

Based on the experiences of the trailing spouse in obtaining a comparable job in the new location, it is evident that the non-JJB spouses of employees may have a very satisfying relocation experience but still experience difficulties the dual JJB couples do not face. As indicated by the employees without a JJB spouse in Table 4, the factor of time would seem to play the greatest part in making a move a pleasant experience. As one employee stated, "The most difficult aspect of moving for us is the lack of time between offer and decision to adequately scout the new area for career prospects."

The Role of the Manager

It is worth noting that several employees strongly emphasized the role of the manager in a relocation. These employees attribute a positive relocation (both with and without JJB-employed spouses) to the efforts of their managers.

Commenting on whether the company has taken a proactive position in dealing with the issue of dual career couples, three employees stated:

- "I think a lot of it is just how committed your management is to make it happen. I think we all have different styles, but if my immediate manager was very proactive and tried to make that happen, I had a lot more assurance that it would happen. There is no system that would just track it; it would be the manager that would personally get involved to make sure that it happened. It would be a larger commitment, a bigger resource, time. I think a lot of that happens at JJB. I think a lot of promotions are done because the manager really goes out for the employees.

"I don't think the policy makes one bit of difference for us. I think it's more an executive commitment that they would want to have both of us stay with the company."

- "I believe that if a person has a good work record, he is

viewed as having additional potential. My experience indicates that the company will do their best to capitalize on that skill because if they don't they've lost something."

"But I think they are smart enough to realize that a happy employee is a contributing one."

"Well, I personally could not have had a better situation, but I ended up with potential receiving management on this end in three different locations committed to helping me find the right job.

- "My manager was most helpful. I know he didn't have to go all out for me, but he did."

In conducting the employee interviews, the recurring theme of management effort and concern came forth from those employees both with and without JJB-employed spouses. From the employee's viewpoint, the success of their relocation (especially for a trailing JJB spouse) largely rests on management involvement.

Other Dual Career Issues Raised During Interviews

4.5 International Assignments

Several employees of JJB raised other issues relative to the issue of relocating dual career couples which merit comment.

Two dual JJB career couples indicated the possibility of relocating to an overseas assignment. Although JJB policy does not apply to international transfers, one couple stated, "We would not go unless we both had good jobs. And I think that again is going beyond the policy and going to the individual manager. They'll make it happen."

This employee's confidence in management "making it happen" may present a severe constraint when the spouse is not JJB-employed. In relocating a couple overseas, quite often the trailing spouse is prohibited from working by the receiving government. This type of situation would make a relocation overseas for a non-JJB dual career couple virtually impossible if the couple is dependent on a second income.

The second couple indicating "there are so many opportunities here that we don't feel we would face a move situation again unless it were a European assignment" would solve the dual career dilemma by the trailing spouse "going on a leave of absence."

4.6 The "3 in 10 Rule"

Two employees moved three times in less than six years. While their moves were perceived as positive relocations, one employee indicated that "that rule is broken whenever people want to break it. Granted you have to get the right number

of signatures... Because if you get to a certain level and if you are identified as having a certain amount of potential, they'll go get the president's signature." It must be noted that although two employees did mention the rule, neither employee indicated in any way that they were adverse to the multiple relocations within a short time frame.

4.7 "Good Employees"

Throughout the interviews, the terms "good employee, "good work record," "loyal employee," "people are important at JJB," and "concern for the individual" surfaced repeatedly. It became evident that JJB employees feel strongly that the organization is concerned about its employees, expresses that concern, and supports its "good employees."

Employee Perception of Intent

JJB employees who participated in this study were asked to relate their impressions regarding JJB's intent in developing a formal policy for dual career couples.

Employees with JJB spouses tend to associate company intent in developing the policy with paternalism on the part of management. Rather than viewing the policy as an attempt to retain executives of the future, employees in this group see the policy as another employee benefit, in the same category

as health care or education benefits.

EMPLOYEES WITH JJB-EMPLOYED SPOUSES

Employee #1: "I think it's just more of an employee benefit to help the family get settled with their location and in finding a job... I think we're trying to get back to the individual and just help that individual accommodate their personal life with their business life... It's very individualistic. But I think the company is very open in that if you have two people looking for opportunities, they will try to accommodate that. I think it's very healthy."

Employee #2: "They have to compete with other corporations and the fact, like I said before, we try to stay ahead of other major corporations in our benefits program and this is part of their benefit package to their employees."

Employee #5: "Well, I suspect in one respect it may be a method of communicating to people who are considering what the ground rules are, as a base, so they know what they can expect."

Employee #8: "To make the transfers as painless as possible, to both members of the couple, taking into consideration the career potential of both. It's a 'one hand washes the other' type of situation. The company perceives a need for one or both the people at the new location. The incentive or lack of negativism is motivation to allow the spouse in either

case to also have career potential. I think it's more than (retaining good people). I think it's to put the skills and expertise in an area where they are most needed with the least personal disruption to the family."

Contrast the statements of dual JJB employees with the clear, rational perceptions of employees without JJB spouses. These employees consider it "nice to know" the company cares but have no illusions about the policy changing corporate culture.

JJB-EMPLOYED WITH NON-JJB-EMPLOYED SPOUSES

Employee #3: "Well, I think the policy is more of a female trailing a male than a male trailing a female. I really believe that is what the policy is for. And that is 99% of the people who use it, I would guess... The policy isn't to give the person a job. The policy is to provide some financial help to help put together resumes or things like that. If you already have a career, then you are pretty good in your career, and it's a matter of selling yourself at the next location if the opportunities exist. And they really don't do that - they assume that the person is going to move and then start pursuing the job. Which is not the way we do it. (Employee was asked to explain.) Well, my husband pursues another job before he moves. And I think that is what most men would do, whereas most women would probably quit their jobs, move with their husbands, and then start to look

for a job in the new area."

Employee #4: "I don't consider it a big deal. I really don't."

Employee #6: "Well, nothing has really changed for the trailing JJB spouse other than priority placement. I don't believe in those cases the company would act any differently without a policy - they have always been very concerned about people. Although I don't think it really applies to someone with a spouse not employed by JJB, it's a nice benefit for those people who do (have a spouse employed with JJB), a little extra security if you're facing multiple relocations."

Employee #7: "I think all they're trying to do is stay ahead of the pack and let employees know they're on top of changes in society. JJB certainly doesn't want to lose its top employees and future executives. That type of person tends, I think, to also have a high-powered spouse."

CHAPTER V

ANALYSIS OF RELATION BETWEEN POLICY AND PRACTICE

One of the objectives of this study was to determine if an organization's policy functions as intended in practice. To fully analyze this objective, the policy, its intent and practice must be evaluated according to employment position of the trailing spouse. Essentially, the trailing spouse is the recipient of the policy, and the employee is the means by which the trailing spouse avails him/herself of the policy.

For those dual JJB career couples, the policy basically functions as intended. The placement of a trailing spouse in the receiving location has been such a long-standing JJB practice that employees appear to view the formal policy as an unnecessary step. In the words of one employee, it's a "nice to know" benefit.

Specific elements of the policy appear to be practiced sporadically. In this context, reference is made to the fact that few dual JJB couples are given relocation counseling. There may be several reasons associated with this lapse:

- Employees who have relocated in the past may be fully aware of policy provisions and do not desire or require counseling.
- Managers approaching an employee for relocation may

already be aware of the trailing spouse's employment status, work record, and skills.

- Four of the five dual JJB couples were offered transfers simultaneously. This may indicate a growing trend to plan ahead and avoid "priority placement" or leave of absence provisions.
- Dual JJB couples are more easily identified by managers.

While the author appreciates the sincerity and concern for the individual by which the policy was developed, a conclusion may be reached that the provisions of the policy itself do not address the concerns of relocation for the non-dual JJB couple.

Specifically, 3 of 4 employees in this group did receive counseling on the policy (one employee did not require it), and it would appear that managers of these employees have taken the necessary steps to insure employees are aware of the policy. The actual policy itself, however, is perceived by this group to be of real benefit only to dual JJB couples. The spirit of the policy does not address the relocation problems non-dual JJB couples face. Though it was probably not the intent to create a policy excluding these couples, the results of this study show that a policy was developed in which two very distinct types of couples have been treated as one.

The point is that one policy cannot address the needs of two different sets of circumstances. There exist within the organization dual career couples whose needs for security for the trailing spouse are very adequately satisfied by the formal policy and by practice. The needs of the second group of dual career couples require different, not necessarily more, types of consideration.

Several important, recurring themes surfaced during the interviews with both the corporate representative and employees:

- The assumption of relocation as a necessary experience.

The author found it most interesting to note that at no time during this study did any of the interviewees suggest that the traditional methods of developing employees with hands-on experience might require reexamination. Indeed, the historical emphasis on relocation for developmental purposes has become the norm. While relocation may truly be necessary in some of JJB's business units, is it really necessary in fields such as financial, manufacturing, or personnel? Perhaps not, but the process by which an organization adjusts its standards for executives (and sends the message through the organization by example) and changes its cultural norms is not an easy one. It requires a rethinking of just exactly what is necessary for development. It also forces an organization to evaluate whether:

- Its excellent managers are outstanding because of their diversity of experience as a result of relocation, or
- Its excellent managers are innately outstanding managers whose leadership potential was recognized in the early career stages.

If relocation is a requirement to progress in one's career, then employees should be told so, "up front" and early in their careers. A second recurring theme is:

- "Nobody says you have to move, but everyone knows."

Employees in both groups indicated their relocation constraints and limitations were expressed to their managers. Yet all the employees have moved, and some have been most admirably accommodated. The JJB Corporation is to be commended for its efforts in attempting to place employees (and their spouses in some cases) within geographical limits and in accordance with career aspirations of the transferred employee.

However, a third recurring theme is that one simply cannot decline many relocation offers without paying a career penalty, especially at lower levels. It can be said that typically in all organizations employees aspiring to enter the ranks of management hesitate to place constraints on their mobility. Recurring comments among dual JJB couples such as, "we wouldn't consider that at our level," "when you

get to our level...", "the company wants to retain us," and "we want assurances..." support this point.

In practice, it appears that the individual manager plays a significant part in making the relocation experience pleasant and equitable for all concerned. That managers are willing to take on the responsibility for a trailing JJB spouse (often at the originating end) reflects well upon the organization's culture. Herculean as the effort required might be, this is of course much easier to do when the trailing spouse is a known commodity. Unfortunately, there isn't much any manager can do to place a trailing spouse who happens to be a teacher.

The following chapter offers some recommendations for policy revision and suggestions of what a manager can do for those couples who fall between the well-intentioned cracks of the current policy.

CHAPTER VI
IMPLICATIONS AND RECOMMENDATIONS

As a result of the recurring theme of relocation as a necessity, a recommendation must be made that the JJB Corporation undertake an evaluation of its practices with the intent of determining whether the long-standing practice of development by "hands-on" experience is, in actuality, a necessity. What may be implied in not doing so is:

- The relocation of more employees than necessary at an ever-increasing cost.
- The potential loss of talented, future executives who might leave the firm for other stated reasons rather than face multiple relocations they are unable to accommodate.

Recommendations

Although none of the employees studied suggested in any way that it is the responsibility of JJB to place all trailing spouses, some clear recommendations evolved from this study:

- Identify dual JJB career couples.
- Identify non-JJB dual career couples.
- Recognize that employees falling into the latter category have distinct and peculiar needs, such as developmental opportunities not requiring relocation and the need for

several weeks (at a minimum) between offer and acceptance.

- Foster an environment which does not penalize the employee who "says no."
- In considering employees for relocation, allow a lead time of at least four weeks between offer and acceptance for non-dual JJB couples (ideally for all employees).

This is the most critical element in a successful relocation of a dual career couple. Adequate lead times enables the employee and the trailing spouse to:

- Investigate job prospects for the trailing spouse in the new area (often eliminating later costs to the company).
- Circulate resumes.
- Arrange child care, if necessary.
- Preclude loss of spouse's income during job search.
- Extend commuting benefits if necessary from the old residence to the new until the spouse is placed.*
- Develop contacts with other employers in locations to help place trailing spouse (networking).
- Discuss relocation requirements at point of hiring and at least annually thereafter.

- Discover what relocation limitations, if any, exist. If possible, implement development plans which do not require relocation. Present options to employee.
- Reimburse initial, excessive child care expenses if move is of short notice.*
- Reimburse costs associated with moving a self-employed spouse's business (within same dollar limitations as existing policy).*
- Develop a commuting expense reimbursement plan for short-term assignments (bi-weekly trips home, partial living expenses).*
- Place within JJB organizations, if possible, JJB employees who must relocate because of a non-JJB spouses's transfer.
- Provide options for job search assistance from which the spouse may choose (counseling, resume preparation, networking).

Essentially, successful relocation for dual career couples not employed by the same company requires more planning, not necessarily more cost. On the basic list of options above, the items with quantifiable costs are so designated with an asterisk (*), but most of the recommendations involve time, effort, and planning. It is important to note that with adequate planning, commuting expenses, initial child care,

and associated expenses could be eliminated.

It also is important to recognize that any organization attempting to address the issue of dual career couples must clearly define its purpose in relocation and the constraints of both organization and employee.

REFERENCE FOOTNOTES

1. "Human Factors in Relocation: Practices and Attitudes from the Corporate and Employee Points of View," Catalyst, 1983, p. 1.
2. Ibid., p. 1.
3. Haight, Gretchen Griffin, "Job-Transfer Survivors," Across the Board, December, 1983, p. 20.
4. Safilios-Rothschild, Constantina, "Dual Linkages Between the Occupational and Family Systems," Family in Transition (Boston: Little, Brown and Company, 1977), p. 561.
5. Derr, C. Brooklyn, and Claire Jacob Turner, "Careers in Collision? The Changing Role of the Executive Wife," Business, April-June, 1982, p. 20.
6. "Human Factors in Relocation: Practices and Attitudes from the Corporate and Employee Points of View," Catalyst, 1983, p. 1.

APPENDIX A

Text of Interview with E. J. Barnes, Manager of Relocation
and Reimbursement Plans for JJB Industries

Interview Location: Chicago, Illinois
Date: December 13, 1983

- Q. When was the policy regarding dual career relocations announced?
- A. April, 1982.
- Q. Would you explain the driving force behind JJB's decision to address the issue of relocation and dual career couples?
- A. Well, we began to find through feedback from the field that there is a growing need for a trailing spouse, who by the way is not always a woman. We began to receive feedback that a number of JJB spouses do not go along on the relocation, that some of our employees commute. Since we transfer about 5,000 employees a year, much of this feedback came from employees whose spouses are also employed with JJB.
- Q. Do you mean that employees are refusing transfers?
- A. No, not generally, but there are some refusals. There are also some refusals where the spouse is not employed. We've found that people are moving for mission reasons as well...
- Q. Would you explain?
- A. By mission, I mean where the job itself is transferred to a new location, and they're relocating for career development mainly. Since we survey annually, the vast majority of the moves are for career development purposes. We survey our transferred employees to determine their satisfaction with the move. Why they move is one of the questions we ask.
- Q. Do career development moves generally involve a promotion?
- A. Sometimes, but not always.

Q. In that case, do your employees understand that continued advancement with JJB to upper management levels requires relocation at some point in their career?

A. Oh, absolutely, I think. Certainly high potential employees understand this. We have thirty-one divisions at JJB - no one can get a significant overview of the corporation without exposure to our different functions and operations. I myself have transferred several times, although my last transfer was eight years ago. There are, of course, some people who "made it" without relocating, but those were the days when JJB was not nearly as large or diverse. It would be a rarity today.

Q. Has JJB attempted to cluster moves within a geographic area?

A. Yes. This has always been one of our objectives, not just because of dual career couple considerations but also because of the expense associated with relocation and in response to the family. If it is possible to give an employee adequate career development without relocation, we always try and do so.

Q. So, the development of a procedure to deal with dual career couples was not in response to the loss of high potential employees or transfer refusals?

A. That's right. We've tried to anticipate employee problems and fix them up front. Of course, we don't have any statistical data yet on whether we've adequately addressed the problem.

Q. Okay, if I'm employed by JJB and my spouse is as well, and he is transferred, what happens?

A. Well, each location has a relocation adviser. If your husband were offered a transfer, the relocation coordinator would ask him if his wife is employed by JJB or employed elsewhere. In smaller locations, the relocation adviser would probably know already. In any case, you and your husband would be briefed by the coordinator on the various relocation benefits available to you. This includes booklets and videotapes explaining our benefits. You, as the trailing spouse, would have priority placement rights at the new location for up to six months. JJB would try and place you in your present occupation. And, of course, if you were in a technical

or specialized field within our organization, there would usually be no problem. The change here in our procedure is in priority placement. You would have absolute priority over any other employees or new hires.

Q. Does this apply only to certain levels, i.e., management, engineering, etc.?

A. No, it applies to every level in the corporation.

Q. Is JJB unionized?

A. No. Our employees have never found it necessary to unionize.

Q. All right, but what happens if my field is highly specialized or simply doesn't exist at the new location?

A. You would still have priority placement, but we would tend to know up front if that condition existed. We would examine our business needs at the new location and retrain you if necessary to fit that need. Reasonable accommodation is made for on-the-job training. This would not be subject to job posting.

Q. Does JJB have self-nomination (job posting) procedures?

A. No, but, if we did, it would not apply in priority placement. Concessions simply have to be made for the incoming trailing spouse. All our employees would want that consideration extended to them.

Q. What if JJB simply cannot place me at the new location in any capacity?

A. Well, you would be allowed to take a six-month personal leave of absence - that's without pay but with benefits and no loss of service time. If after the six-month priority placement JJB cannot place you, you would be given normal consideration for an additional six months. A personal leave could also be extended. At the same time, you would be reimbursed up to \$500 for job counseling or resume preparation.

- Q. Suppose I'm employed, but not with JJB?
- A. We would give you normal but not priority consideration for JJB employment. Otherwise, you're entitled to the same benefits for reimbursement as a JJB spouse.
- Q. Are there any restrictions?
- A. Only that you must be employed prior to the relocation offer. The \$500 reimbursement doesn't apply to new entrants into the job market.
- Q. Does priority placement consideration create inter-divisional problems? By this I mean head count restrictions.
- A. No. Priority placement applies to all divisions. This is a JJB problem, not a divisional problem. We make concessions if a hiring freeze is in effect. After all, from a corporate point of view, you're already employed with JJB.
- Q. What are the costs associated with the relocation procedure?
- A. Absolutely minimal. When you consider that a relocation costs between \$40,000 and \$50,000, we have a major investment in the development of people. Another couple of thousand dollars is miniscule when you consider the cost of not doing anything.
- Q. Would you elaborate on the cost of doing nothing?
- A. The inability to develop executives, losing high-potential employees, not recognizing change and getting a reputation with our employees for it. It would be stupid not to do something positive. Why would you not want to?
- Q. Well, many companies would consider it to be the employee's problem, not theirs.
- A. But our employees' mental and professional well-being is our concern.

- Q. Well, frankly, \$500 doesn't seem like much when you consider the cost of a job placement firm.
- A. The figure of \$500 could certainly be modified in the future. It's just a starting point. We evaluated the cost of resume preparation and job counseling and felt this was a reasonable, affordable figure. Of course, many recruiting firms pay the fees. But, if not, the \$500 could be applied there as well. In all likelihood, this figure will be modified in the future as we obtain more feedback from the field.
- Q. How have JJB employees been made aware of the new procedure?
- A. All of our divisional personnel directors wrote a one-and-a-half page letter outlining the benefit changes. It has become part of our manager's operating manual and is the personnel director's responsibility to make it known to employees.
- Q. Are you getting any feedback from your personnel directors?
- A. Verbally, yes. We're hearing good things. The divisions are saying, "Right on." We can implicitly conclude thus far that the policy works as intended. I'm not getting messages from the field any longer that this is an issue.
- Q. Two more questions. If a non-JJB spouse is transferred, will JJB attempt to relocate the employee to the new location if a facility exists?
- A. JJB does not have a formal policy stipulating that we will place employees in a non-JJB move. However, if the person in question is considered to be really high-potential, we certainly would do everything possible to retain that employee. Because it would not be a JJB initiated move, priority placement would not apply, although the employee is still entitled to a six-month leave of absence with benefits and normal placement consideration.
- Q. In this case, would the \$500 reimbursement fee apply?
- A. Not in this instance, since we did not initiate the move.

Q. If a husband and wife are offered a JJB transfer, and for whatever reason one person is unable to make the transfer, will JJB reimburse or give special consideration to commuting expenses?

A. No.

Q. Even if the move is JJB initiated?

A. No. We have not addressed commuting expenses at all. That is pretty much the decision of the couple involved, although we may address the issue at some future point. Basically, we want to retain good employees while giving them opportunities to progress in their careers. It's good for the employee and good for JJB. We've simply tried to make our employee-related benefits reflective of that philosophy.

APPENDIX B

Demographic Survey Questions

1. What has been your length of service with JJB?
2. During your career, how many relocations have you made?
3. Is your spouse employed? Full-time or part-time?
4. Is your spouse employed by JJB?
5. Was he/she employed by JJB prior to your last relocation?
6. How much time lag (approximately) was there between your old job and your new assignment?
7. Was this time lag sufficient for discussion with your spouse?
8. When you were approached to relocate, were you advised of the spouse assistance plan?
9. If not, how did you find out about the relocation assistance plan for your spouse?
10. If applicable, did your spouse use a job placement firm to find a job in your new location?
11. Was your spouse offered a JJB position (if prior employment elsewhere)?
12. Did you incur any costs to the placement firm not covered by JJB?
13. Do you feel the \$500 limit on job placement reimbursement is sufficient?
14. Would you consider commuting to a new location for an extended period of time rather than moving?
15. If so, do you feel all or a portion of commuting expenses should be reimbursable?
16. Are there any other elements of the plan you feel may be missing?
17. Do you anticipate future transfers?

APPENDIX C

The Relocation Experience

HOW EMPLOYEES LEARNED OF THE RELOCATION POLICY

JJB Employees with JJB-Employed Spouse

Employee #1: "Well, I guess in JJB, I'm not sure that we - I've never written or read the policy itself. I think that a lot of policies and practices that the company has just get talked about over the years in discussion with your manager. So I should ask you - what does the policy actually read?" After reviewing the policy, the employee indicated "I was not even aware of" the leave of absence provision.

Employee #2: How employee knew about the policy: "Well, I think it was when we started moving so frequently. I think that right now, in the job I have, you can hear everything that comes down from the executive offices, any changes in policies and what have you, that really makes me even more aware of JJB getting more involved in this type of thing."

Employee #5: "I have not had to deal with it ever, as a manager. So I am not really in a position to assess what has changed."

Employee #8: Employee indicated he was not aware of all the provisions of the policy because "at the time, I was a manager also and pretty much knew what the manager would do."

Employee #9: "I was aware of the policy as a manager and through my husband's job with the company."

JJB Employees with Non-JJB-Employed Spouse

Employee #3: "Oh, the manager is always well informed. He has all kinds of publications that are available." (Note: employee was the manager at the time of the relocation offer.)

Employee #4: "Of course, I don't have a trailing spouse. They changed the relocation plan which probably does the same type of thing as the previous practice... They changed the relocation plan so that if you have a non-JJB spouse, the company will pay up to \$500 for employment counseling. Now my husband has his own business. I'm going to be in the interesting position of trying to convince the company that because he has his own business it's a lot easier for me to move and that therefore they should pay up to the same

amount, \$500, for expenses that he incurs as a result of moving." (Note: Employee was a manager at the time of the relocation offer and already knew about it through the manager's manual.)

Employee #6: "Well, I found out about it through an employee bulletin, but I had heard about it from other people."

Employee #7: "I knew about it through the manager's manual."

WAS THE EMPLOYEE GIVEN PRE-MOVE COUNSELING?

JJB Employees with JJB-Employed Spouse

Employee #1: "No, not really. It was very natural. 'OK, fine, you're going to move, here's the moving package that we have.' And if you have any questions, there is always someone in personnel that would resolve those. Well, there is probably a counselor at locations, for example in a plant environment or laboratories. Zone offices, for example, have one personnel specialist who's the 'guru,' if you will, on relocation benefits within the region. They might have ten branches report to one region, and on that staff in the region there might be somebody who is very knowledgeable."

Employee #2: "Yes. As a matter of fact, we moved three times before the policy even went into effect. They were extremely helpful in placing (my spouse) without any pressure on my part. I have been a loyal employee, and I feel that when - they try to take care - people are very important to JJB, and respect for the individual is very important there. If you work hard, they are not going to forget you."

Employee #5: "This wasn't necessary, since we were offered simultaneous transfers."

Employee #8: "In our situation, we really haven't encountered that because the demand for either programming talent or managerial talent is relatively good at the locations." (Note: The employee indicated this is not necessary because of the need for expertise such as his wife possesses.)

Employee #9: "Not really. I knew they had positions open for my abilities, so we were both offered jobs at the same time." "At the end of the interview, I mentioned that my husband was also with JJB, and that was the first time he appeared to be aware of the fact that my husband was a JJB-er. What he asked me was, 'Do you think it is going to be a problem for him to find a job? Would you come without him finding one?', and I said, 'No, I will not. But I don't think there's going to be a problem.' And it wasn't."

JJB Employees with Non-JJB-Employed Spouse

Employee #3: "(No) Only if you ask to use the service. Yes. I knew the service was available." Employee indicated she did not choose to use the service.

Employee #4: "Yes."

Employee #6: "Yes. Although as I said, I already knew about the policy. I don't think it really makes much difference if your spouse is not employed by the company."

Employee #7: "Yes, although I knew about the dual career couple provision. Basically, it was a review of updated benefits for relocation since my last move."

HOW WAS THE EMPLOYEE APPROACHED ABOUT RELOCATING?

JJB Employees with JJB-Employed Spouse

Employee #1: "Both us us were asked to relocate at the same time. Most managers know who the dual career couples are."

Employee #2: "We were just asked to move. All my moves have been promotional."

Employee #5: "Along with my husband."

Employee #8: "The reason for a transfer out of the Detroit area was that we wanted a warmer climate." (Note: This move was initiated by the employee.)

Employee #9: "We were both asked at the same time."

JJB Employees with Non-JJB-Employed Spouse

Employee #3: "I was just asked. It was a promotion and necessary to my career development."

Employee #4: Employee indicated this was a promotion.

Employee #6: "Well, I was just asked to relocate. Of course, it was a promotion for me. My manager did ask about my husband, though, and if he would be able to relocate."

Employee #7: "I was asked if my wife had a career and would this present a problem for her. My move was promotional."

DID THE EMPLOYEE HAVE SUFFICIENT TIME TO CONSIDER THE OFFER?

JJB Employees with JJB-Employed Spouse

Employee #1: "It varies. When I was leaving my first line management job, I knew for three months prior that I was being considered for various jobs, so I had a lot of time to prepare for that. The other time (due to a mission change) we were given, 'Here's your next job. If you want to take it, by tonight call me at home.' So a lot depends on the circumstances of the situation. I think my husband and I would both demand some time to think things through and think what the options are."

Employee #2: "We didn't have a time problem - it depends on the person." (Note: This was a simultaneous move with the JJB-employed spouse).

Employee #5: Employee did not respond in the affirmative or negative.

JJB Employees with Non-JJB-Employed Spouse

Employee #3: "Not really, although I had a feeling - I did not have a formal job offer long enough to evaluate the prospects, but I had an idea of what area I would be moving to from job to job so that he (spouse) could start thinking about it." "I think my husband didn't move until he found a job that he wanted. He always keeps the job that he has until he sees what the prospects are for a new job. But I don't think you can do that in a couple of weeks. You have to get a feel for the area and what is available there. I would say that on average it takes him a couple of months after I accept another job to really find something that he wants." (Note: Employee stated on the demographic survey that she had two to three days to make a relocation decision.)

Employee #4: Employee indicated on demographic survey that she had about one business week to make a decision.

Employee #6: "I had about one week. It wasn't enough time to evaluate the job opportunities for my husband, but the geographic location was good and we felt there would be opportunities."

Employee #7: "No, I don't think so. My wife and I are commuting now since the job market is so depressed in her field in my new location. I would certainly have preferred a month's notice so we could seriously evaluate job prospects for her."

WAS THE RELOCATION EXPERIENCE POSITIVE?

JJB Employees with JJB-Employed Spouse

Employee #1: "Oh, I think very much so."

Employee #2: "Very... I think that it's been because I've been a very dedicated and loyal employee, and I think I have that going for me."

Employee #5: "Definitely... (On the corporation making allowances for dual career status) I didn't have any problem there. They were very cooperative."

Employee #8: "In my case, yes. There was very little unpleasantness, everything went beautifully, in the last two moves." "The manager that I was transferring to here went out of his way to contact forwarding managers to make sure that my wife had a job that would satisfy her."

Employee #9: "In my case, yes. There was very little unpleasantness, everything went beautifully, in the last two moves." "The manager that I was transferring to here went out of his way to contact forwarding managers to make sure that my wife had a job that would satisfy her."

JJB Employees with Non-JJB-Employed Spouse

Employee #3: "Yes, they have... I think it was rather positive. I had not had a relocation problem. It is very good financially, and that is a big plus, because you don't necessarily have to spend a lot of money out of your pocket in order to move. I guess the biggest problem I've had moving is that I don't like to move. So it's just a matter of getting settled in a new location. It always takes longer than I would like for it to take."

Employee #4: "Oh, yes."

Employee #6: "From what the company provided in the way of benefits, very much so. It was rather difficult for my husband, though, because he is a manager in a brokerage house. He contacted a head hunter and had to switch firms. There was a loss of income for about two months. Of course, in his profession there just isn't anywhere he can fit into JJB."

Employee #7: "Basically, yes. Of course, I would like the company to help with commuting expenses and some of the expense associated with another household. At least they considered my wife's career, though, which is something most corporations wouldn't do."

DOES HAVING A COMPANY POLICY REGARDING DUAL CAREER COUPLES
MAKE A DIFFERENCE?

JJB Employees with JJB-Employed Spouse

Employee #1: "I don't think the policy makes one bit of difference for us. I think it's more an executive commitment that they would want to have both of us stay with the company. It's hard to explain, but I would think that the policy is for the general, but I would think that when you get to the level that (my husband) and I are right now, it would take a lot more than a policy to make that happen. It's an executive commitment to make that happen."

Employee #2: "I think JJB always made a point to help them (dual career couples within JJB). They just didn't make a big thing about it. Now because of the fact that there are more women, there is more made of it. Now we're kind of having to show the world that we are in fact helping spouses of employees find comparable positions - it has come more in the limelight even though for years and years they have been doing that anyway. They have never provided a headhunter or the agency that helps find a job or that kind of thing, but they have helped within the corporation to find jobs."

Employee #5: "Well, I suspect in one respect it may be a method of communicating to people who are considering what the ground rules are, as a base, so they know what they can expect. I think it also provides, in a case of a dual JJB career, some degree of assurance that you won't fall off the end at the other end if you are the second person, that your situation will be identified to the receiving location and they are obligated to act on it. I think there is some degree of protection there which is possibly more security-oriented than is necessary. But I believe that you shouldn't give 100% guarantees to everybody all the time about everything they might like to have a 100% guarantee about. I'm not sure that you stay profitable that way. By the same token, I think you do have to make a concerted effort to watch after an employee who is relocated for one reason or another."

Employee #8: "Having a policy doesn't make a difference. JJB has always made it a practice to retain its talent."

Employee #9: Employee indicated that the company does not really deal with all dual career couples, citing names and instances of employees whose trailing spouse (JJB-employed) was not offered a position.

JJB Employees with Non-JJB-Employed Spouse

Employee #3: "I really don't know the answer to that. I haven't used it, and I don't know how ell it works, to be quite honest with you. I know it's available, and I know it's there, and I've seen the press on it, but I'm not sure what the value of it is. I can't really address it because I haven't really used it. My husband was always able to find his own job, and so we didn't use any of the counseling or whatever else they provided."

Employee #4: "I don't consider it a big deal. I really don't. My attitude is that if you have a large corporation, there is really very little that you can do for a dual-career family. You can be sensitive, you cannot penalize somebody, but if the person isn't willing to move to gain the different types of experience, in the long run they are going to lose out because they don't have the kinds of experiences that other people have."

Employee #6: "Well, it's nice to know the company has taken a proactive stance on this issue. I think as a policy it makes a difference to dual JJB couples because it assures the trailing spouse priority placement. However, for those without JJB spouses, I think some other benefits might be more applicable."

Employee #7: "Well, JJB always operated on the premise that if your husband or wife was already employed with the company then they would try and place the spouse. I think that it really doesn't make a difference to those of us, and there are probably more of us than those with company spouses, since it really isn't the company's responsibility to place a trailing spouse."

BIBLIOGRAPHY

1. Kopelman, R. E., Rosensweig, L., and Lally, L. H. "Dual Career Couples: The Organizational Response." Personnel Administrator, September 1982, pp. 73-78.
2. Magnus, M. and Dodd, J. "Relocation: Changing Attitudes and Company Policies." Personnel Journal, July 1981, pp. 538-548.
3. Firestone, D. R. "Relocating Women Managers' Can Your Company Meet Their Needs?" Society for Advancement of Management Journal, Spring 1981, pp. 41-47.
4. Greiff, B. S. and Munter, P. K. "Can a Two-Career Family Live Happily Ever After?"
5. Hunsaker, J. S. "Work and Family Life Must be Integrated." Personnel Administrator, April 1983, pp. 87-91.
6. Mangum, W. T. "What Mortgage Rates are Doing to Executive Mobility." Administrative Management, February 1982, pp. 59, 60, 86-87.
7. Stringer-Moore, D. M. "Impact of Dual Career Couples on Employers: Problems and Solutions." Public Personnel Management Journal, pp. 393-401.
8. Cardwell, J. W. "The Other Side of Relocation - Relocating the Spouse." Personnel Administrator, September 1980, pp. 53-56.
9. Flynn, R. W. and Litzsinger, J. U. "Careers Without Conflict." Personnel Administrator, July 1981, pp. 81-85.
10. Sailer, H. R., Schlacter, J., and Edwards, M. R. "Stress: Causes, Consequences, and Coping Strategies." Personnel, July-August 1982, pp. 35-48.
11. Wheelock, K. "Office Relocations in the 1980s." Personnel, September-October 1979, pp. 72-77.
12. Rozier, B. "Motivating Managers to Move On." Personnel Management, May 1981, pp. 30-33.
13. Hall, F. S. and Hall, D. T. "Dual Careers - How Do Couples and Companies Cope with the Problems?" Organizational Dynamics, Spring 1978, pp. 57-77.

14. Stillman, A. "Working Spouses and Employee Relocation." Personnel Administrator, February 1979, pp. 55-60.
15. Zawacki, R. A. and Maynard, C. E. "Mobility and the Dual-Career Couple." Personnel Journal, July 1979, pp. 468-472.
16. Frank, R. H. "Family Location Constraints and the Geographic Distribution of Female Professionals." Journal of Political Economy, 1979, pp. 117-131.
17. "Careers Still Count, Transfer Woes Grow But Executives Still Go" (IW Staf Report). Industry Week, November 30, 1981, pp. 98-102.
18. Mincer, J. "Family Migration Decisions." Journal of Political Economy, 1978, Vol. 86, No. 5, pp. 749-773.
19. Prah, D. W. "When Moving Up the Ladder Means Moving Out of Town." Supervisory Management, July 1973, pp. 18-23.
20. Guerrier, Y. "The 'Organization Man': Is He Becoming Extinct?"
21. Tyler, L. J. "Love 'Em or Leave 'Em? Evaluating Job Offers." Business Horizons, May-June 1983, pp. 7-10.
22. "'Company Couples' Flourish." Business Week, August 2, 1976, pp. 54-55.
23. "Commuting: A Solution for Two-Career Couples." Business Week, April 3, 1978, pp. 66-68.
24. Goodman, J. L., Jr. "Immobile Americans?" September 1982.
25. Cox, A. "The Married Executive Has the Edge."
26. Johnson, J. F. "Places People Like to Work and Why." Delivered to the Management Policy Council, Parsippany, New Jersey, October 14, 1982, Vital Speeches, pp. 135-139.
27. Rubin, Z. "Are Working Wives Hazardous to their Husbands' Mental Health?" Psychology Today, May 1983, pp. 70-72.
28. Gilmore, C. B. and Fannin, W. R. "The Dual Career Couple: A Challenge to Personnel in the Eighties." Business Horizons, May-June 1982, pp. 36-41.

29. Blitzer, C. G. "Couples With Two Careers Have Special Benefit Needs." Business Insurance, September 27, 1982, pp. 30, 38.
30. Weaver, C. and Couchman Smith, L. "Dual Career Couples: A Corporate Personnel Dilemma." The Texas Business Executive, Summer 1980, pp. 28-31.
31. Friedman, D. "Where His Career Leads, Would You Follow?" Working Woman, June 1981, pp. 74-78.
32. "Human Factors in Relocation: Practices and Attitudes from the Corporate and Employee Points of View."
33. Cooper, G. The Executive Gypsy. MacMillan Press, 1979.
34. Jago, A. Employee Relocation Expenses. IBM Information Report.
35. Bickerstaffe, G. "Have Spouse, Will Travel." International Management, March 1982, pp. 21-26.
36. Derr, C. Brooklyn and Turner, Claire Jacob. "Careers in Collision? The Changing Role of the Executive Wife." Business, April-June 1982, pp. 18-22.
37. "Working Women." U. S. News and World Report, January 1979, p. 66.
38. Hall, Francine S. and Hall, Douglas T. The Two-Career Couple. Reading, Massachusetts: Addison-Wesley Publishing Company, 1979, p. 210.