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Helping Individuals to Cope with Change: Lessons from Group Move Relocation

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Introduction

This article will examine one of the building blocks of organisational change, individual coping, on the basis of an investigation into a particular type of change process, group move relocation. Unlike individual relocations such as job transfers for promotion, group moves encompass the concurrent 'enforced' relocation of many employees often from the same department or function i.e. employees move for organisational rather than individual reasons. The article outlines the study method before developing the links between individual coping, the management of change, and the management of group moves. The article concludes that individuals involved in group moves progress through separate coping cycles for home and work transitions. This finding is used to identify factors affecting the individual experience of group moves and to list a number of practical implications for managing this aspect of the organisational change process.

There is a limited, but growing, academic interest in organisational relocation. For example, Forster (1, 2) investigated individual relocation on the basis of career development and job mobility, Brett *et.al.*, (3) researched the willingness to relocate, and Dex (4) commented on the gender dynamics of relocation decision making. Such interest is well founded because relocation is evidently a 'key' company event (5, p.11) an apparently common feature of organisational life (6) and a very expensive undertaking (7, 8). Yet despite being an evidently distinctive but problematic form of organisational change process, the author's five year study has found evidence to suggest that the individual experience of group moves can still be very traumatic. Furthermore, such traumatic effects appear to be partly caused by managers failing to understand how individuals cope with change.

Method

The innovative research methodology (9) incorporated 134 semi-structured interviews, three surveys, observation, company documentation and literature reviews. It started with the identification of a broad problem area, the management of organisational relocation, and developed its focus to consider the management of group move relocation in terms of the management of change. This built upon undeveloped links already made in the emergent change management literature (see, for example, 10). Following the work of key commentators such as Van de Ven (11), Pettigrew (12) and Pettigrew and Whipp (13) the research adopted a longitudinal study which concentrated on the content, context and process of change. This was based on purposive qualitative sampling (14) with systematic and bounded data collection. Ontologically, change was regarded as a socially constructed reality which should be considered from a plurality of perspectives. Furthermore, change was considered to be partly shaped by choices made by those

involved in the process. The consequent emphasis of the research was on a grounded theory approach (15). Theory was subsequently regarded to emerge from a systematic, developmental and continuing process of linking analysis and data i.e. the 'constant comparative method' (16).

The Preliminary Fieldwork

The first phase of the fieldwork was designed to assess current relocation practice in the UK. One of the key features of this and subsequent fieldwork was the use of triangulation (17). Critically, triangulation was applied in a way which was consistent with the methodology i.e. in terms of clarifying meanings by synthesising multiple views rather than in terms of seeking perfect replication (18). Perhaps unusually for a mainly qualitative research project, the preliminary fieldwork included two surveys. These covered the experiences of relocation consultants and trade unions. It also contained 'collective' case studies (19) of organisations involved in different phases of relocation management. Five organisations were studied: The Royal College of Veterinary Surgeons, Lloyds Bank UK Retail Banking Headquarters, Motor Co. and the National Grid Company.

The Major Case Studies

The main cases were chosen on the basis of theoretical sampling (20). As one of the main thrusts of the research was to investigate 'meanings' (21), the key data collection instrument was the interview. However, data were also gathered from documentary sources, structured observation, and a survey of industry mission and vision statements. Over 100 interviews were conducted in the main organisations of the emergent electricity generating sector in England and Wales (EGS): 49 at Electric Co.; 40 at Utility Co.; and 25 at Generation Co. Within each organisation there was a broadly equal coverage of four representative groups: relocation specialists (in the human resource and facilities departments); managers actively involved in the management of their department's relocation; and individuals who had relocated. Key informants (22) were used as the starting point for developing contacts with individuals from as broad as possible a range of departmental functions within each organisation. This use of 'maximum variation sampling' (22) also extended to finding contradictory or disconfirming evidence.

Analysis

One of the challenges of the methodology lay in analysing the wealth of data generated by the fieldwork. The process of analysis and interpretation was iterative and continuous. Raw data was sorted chronologically, with chronological events being regarded in terms of conceptual tracks (24). This led to an initial ordering of the data into different phases of the relocation change process. Separate views were also developed to reflect the perceptions of different groups of organisational actors (25). During subsequent analysis, the raw data was further ordered by adopting some of the tactics for generating meaning proposed by Miles and Huberman (26).

Having described the purposive but flexible nature of the research strategy, the next section investigates the literature which deals with individual coping and the management of organisational change.

Coping With Change

The links between coping, the management of change, and the management of group moves will be developed under five main headings. These cover: coping and change; relocation and change; expectations of relocation; coping with relocation; and the management of coping. It will be argued later that this helps to build up a picture of the factors which affect the individual experience of group moves (27), which in turn has important implications for helping individuals to cope with change.

Coping and Change

Although an aggregated process, organisational change is apparently built upon individual change (28). But questions of how to manage the personal aspects of individual transitions, or of who should manage them, are very difficult to answer. One of the first problems is that: "Personal meanings are important determinants of the impact of change" (29, p.54). Thus, different individuals may have different experiences of the same change. In addition, it is claimed that the ability to cope is affected by internalising (physiologically reactive) responses or externalising (behaviourally reactive) responses (30). As a result, a failure to cope with change may trigger a spiraling interaction between abnormal responses and the subsequent reaction to these by others. Individuals may also pass through up to five different phases of coping (31) with responses ranging from denial to internalisation of changes. But because there are differences between attitudinal and behavioural conformity to new demands, it has been suggested that: "... attitudinal conformity is at times both unnecessary and almost impossible to achieve..." (32, p.214). In other words, although individuals may not fully internalise changes, they may have adequately coped according to other criteria. Indeed, the process of recovery from loss implies that coping may be enacted by dealing with the past rather than subscribing to anything new (33).

In his analysis of individual work transitions such as job transfers, Nicholson (34) has noted that there are two dimensions of change; personal identity and role development. Accordingly, an individual has to deal with a change in their self-conception, as well as with a change in their relationships within the organisation. However, change also seems to have an emotional content, whether ascribed to the fear and enjoyment of a transition (see, for example, 35), or to the pain and threat of unlearning (36). Consequently, individuals are believed to face a number of transitional challenges including: threats to self-esteem and self-knowledge (37); ambiguity (38); and stress (39). Each individual transition may therefore be considered in terms of multiple levels of challenges and multiple levels of reaction.

Relocation and Change

The links between relocation and change seem to be poorly developed, with authors only referring to relocation in the context of a broader piece of work on change. With few exceptions, the change accounts regard relocation as being a negative phenomenon. For example, Carnall (40, p.143) suggested that a relocation of the workplace and home: "...can lead to feelings of depression and frustration because it can be difficult to decide how to deal with these changes". Kanter (41, p.38) follows this negative theme by suggesting that organisational relocation

is a symbol of organisational decline. A similarly pessimistic line is taken by Woodward *et. al.*, (42) who refer to organisational relocation as a negative change event which has an adverse affect upon employees and consequently upon the organisation itself. Moreover, Plant (43) implies that organisational relocation is both a common change event and a potentially major trauma. Finally, Toffler (44, p.78) believes that relocation is a fairly common aspect of change within peoples' lives and states that: "Perhaps the most psychologically significant kind of movement that an individual can make is geographical relocation of his home".

Expectations of Relocation

Much of the emergent relocation literature appears to concentrate on individual expectations of a move. Furthermore, many of these studies are from the USA rather than from the UK. The studies also seem to concentrate on individual mobility, especially with regard to the willingness to relocate. For example, Rodgers and Rodgers (45) report that nearly 35 per cent of adults with young children would not accept employment if the job involved relocation. Brett *et.al.* (46) found that the willingness to relocate was not affected by: sex; ethnic group; number of children; job involvement; job satisfaction; or company loyalty. It is also suggested that: "willingness to relocate for career enhancement or company needs is mainly a function of individual and family characteristics, while willingness to relocate to remain employed is mostly a function of attachment to the organisation" (47, p.679). In addition, Fritz (48) claims that resistance to moving is increasing although she believes that resistance can be overcome.

But despite indicating intent, it is unclear as to how individuals would actually behave should a relocation opportunity arise (*cf.* 49). What is more, there is very little obvious discrimination between different types of relocation. For example, Forster (50, 51) and Forster and Munton (52) encompass both 'company group relocations' and 'individual career moves' in their analysis. This intimates that different types of relocation share common traits. Consequently, although the relocation literature presents a number of themes in individual expectations of relocation, the author supports the argument that: "From a practical standpoint, managers should be aware that employees choose to accept or reject specific moves, not to accept or reject relocation as an abstract concept" (53, p.173).

Coping with Relocation

There are evidently very few studies which deal with actual experiences of group move relocation i.e. the relocation of a function, department, section or entire office. In an isolated British study, Mann (54, p.194) found that the group move from a large city to a small town increased the dependence of employees on their employer if only: "... because they feel that in relocating they have already put considerable trust in their company by putting their future in its hands". More generally, forced relocation (an implicit element of group moves) was found to be synonymous with a bereavement (55). Indeed, the individual experience of organisational change *per se* has been compared with bereavement (56). Finch (57, p.53) argues that individual relocation is a primarily male domain, with a necessarily discriminating consequence for the female partner: "For the male worker, the mobile lifestyle has an inherent thread of continuity, precisely because each move is related to his work". This theme of discriminatory geographical mobility is echoed by a number of other writers including Dex (58) and Grint (59). There is also

an apparently broader relationship between relocation and the transfer of experience between home and work. Subsequently, Crouter (60, p.438) draws attention to the impact of 'psychological spillover' and suggests that researchers have neglected the impact of the family on work because they concentrate on the impact of work on the family.

Relocation has also been implicitly and explicitly associated with stress. For example, Cooper (61, p.16) states that: "Implicit in the literature is a fundamental distinction between acute and chronic as applied to pressure and stress. Some pressures (e.g. relocation) are of relatively sudden onset and duration, and can be classed as acute; others will be constantly present (e.g. a poor relationship with one's superior) and therefore chronic". In effect, relocation is therefore seen as being a limited event which, although stressful, will only be stressful for a relatively short period of time. But should the move encounter problems there is evidently still potential for chronic effects (62). Munton (63) and Forster (64,65) have also reported the individual experience of relocation as being stressful, with some stress being home related e.g. triggered by changes in social networks, spouse employment and children's education. Moreover, such stress was directly linked with a drop in job performance. Several authors have also linked stress with the physical work environment, a factor which necessarily changes after relocation. For example, Myerson (66) associated stress with a lack of individual control over the internal work environment. However, it should be noted that stress may be considered to produce negative and positive effects (67) i.e. the result of relocation related stress may actually be an improved work performance.

The Management of Coping

Cooper and Marshall (68) have cautioned that coping can be either adaptive (with a positive outcome) or maladaptive (with a negative outcome). In like manner, Child (69) says that although change may be rejected, individuals may still involve themselves in the process to block change, or to secure the best possible personal outcome. This indicates that individual coping with relocation may take many forms. Indeed, Kotter and Schlesinger (70) imply that resistance to change, one possible coping outcome, may not be a purely negative phenomenon i.e. it can be grounded in a greater appreciation of how change may adversely affect the organisation and should be taken into consideration when making management decisions. The authors believe that resistance to change may become evident as political behaviour, a view shared by Child (71) who also notes that resistance may take time to be expressed openly. This suggests that expressions of coping and the change event itself may be separated in time and focus, thus causing problems for management.

Ashford (72) distinguishes between coping resources and coping responses. The former are seen to consist of (perceived) control, self-esteem and tolerance for ambiguity. The latter are composed of rationalisation (redefining the situation), action (directly addressing the problem) and the management of emotions. Other authors have also indicated ways in which the individual may manage aspects of their own change experience. These include: the development of individual life plans (73, 74); the establishment of 'stability zones' and the use of halfway houses to allow acclimatisation to changes (75); and encouraging individuals to share their worries and concerns (76, 77). Finally, there is evidence which suggests that it is the perception of managerial support rather than managerial support *per se*

which has a critical impact on employees coping with the organisational change process. For example, a US study found that: "... employees who perceived their supervisors as unsupportive on family issues reported higher levels of stress, higher absenteeism and lower job satisfaction" (78, p.123). Additionally, Jayar-tane *et.al.*, (79) found that perception of support was highly correlated with a reduction in stress.

Change consequently seems to be an individual experience which may be explained by a process of coping. The management challenge of helping individuals to cope with change appears to combine direct action with measures which may enable an individual to manage their own change experience. This will be examined in more detail with respect to a particular type of change process, group move relocation.

Relocation in the EGS

The author's research examined the group moves of headquarters staff in the EGS. This included in depth interviews with individuals who had moved, as well as with specialists responsible for managing the relocation process.

The Pattern of Moves in the EGS

Relocation was initially triggered by the privatisation of Electric Co. and Utility Co. and was used to establish the 'right' mix of employees at the successor companies' headquarters. During this early phase, movement was quite dramatic with Electric Co. relocating over 500 employees and Utility Co. over 400 employees. Subsequent moves were more closely tied to other organisational changes such as restructuring and downsizing. Thus, for example, in 1994 Generation Co. closed offices in Westville and moved nearly 300 jobs to its Shire Town headquarters. In like manner, in 1995 Utility Co. developed a new headquarters in Betaville which resulted in the relocation of nearly 600 staff (80). But more dramatically, all three successor organisations moved some groups of employees more than once. This was exemplified by Electric Co.'s relocation of training staff from various locations to Garden Town in 1993 and then again to their New Town headquarters in 1994.

The Relocation Experience of Individuals

There were a number of themes in the relocation experiences of individuals at Electric Co., Utility Co. and Generation Co. For, example, the decision to move was not welcomed. Employees had expected their moves to be 'risk free', but suggested that the experience had actually been 'gain free' or 'a slight rip off'. Moreover, relocation expectations were largely shaped by external relocation consultants and by the employer's presentation of relocation support packages. The individual experience varied according to how employees had been told about the move and what reasons had been given for moving. Surprisingly, previous relocation experience (often with the CEGB) was not found to be comparable to the group moves. Moreover, individual moves *per se* were not found to be comparable with group moves. Employees believed that they had little choice about moving. Furthermore, although financial packages were seen to be generous, there was a widespread belief that organisations had not provided 'personal' support. Relocation support ended at the physical move even though the research found

that relocation effects, such as the failure of family members to settle in the new area and a perceived fall in work performance, continued after the physical move.

Group moves were traumatic experiences for the majority of employees. Moreover, traumatic effects seemed to affect family members as well as employees. As one senior manager in Electric Co. commented: "The company had a package to move me which was supposed to take the hassle out of the move and sort of cushion or smooth, whatever adjective you want to use to describe it, the process of me getting out of Aylsham. As it turned out, it was one of the most difficult moves I'd made with a company". Indeed, individuals considered themselves to be 'lucky' if they had not experienced problems with a move. One of the key problem areas was the valuation of property. However, other difficulties included enforced separation from families, changes in commuting patterns, disruption to spouse's employment and children's education, and the loss of social circles. More extremely, each organisation had employees who spoke of their relocation in terms of 'horror', 'bitterness', 'heart attacks and divorce', and 'misery'.

Findings

Although the research had concentrated on group moves, it found that the aggregated organisational relocation experience was derived from multiple individual relocation experiences. However, the individual experiences of the group moves studied seemed to be qualitatively different to the reported experiences of individual career related transfers. The management of group moves in the EGS will therefore be examined in terms of two explanations of coping; the transition cycle (81) and the coping cycle (82).

The Transition Cycle

This model assumes that the relative length of time spent in each stage is determined by the type of transition. It therefore implied that the transition cycles of different individuals involved in the same group move would have similar shapes. Furthermore, Nicholson (83, p.86) states that: "Where transition is between different environments and involves job movers and their families, i.e. many geographical relocations, difficulties are likely to be concentrated in the non-work sphere". Evidence from this research indicated that the shape of individual transitions during the same group move varied quite considerably. This was illustrated by the relatively easy move of many single employees and the more complicated moves of many married employees who had children. In addition, some employees, such as Electric Co.'s training staff, appeared to have commenced another transition cycle before completing all the stages in the previous cycle. The research evidence also indicated that group move relocation may be better explained in terms of separate cycles of home transitions and work transitions, rather than in terms of a unitary transition cycle. Indeed, taking this perspective suggested that although non-work difficulties were prevalent, this was not always the case. Furthermore, it indicated that organisations provided conditions for managing work changes both formally, for example through training, and informally, for example through networking. In contrast, if the home transition was analysed as a separate cycle this suggested that very little support was actually available to deal with issues of preparation, encounter, adjustment and stabilisation. Despite this, employees evidently expected their employer to manage most of the relocation process.

The Coping Cycle

Carnall's (84) coping cycle appears to provide a better explanation of individual experiences of group moves in the EGS. For example, it commences with a stage of denial rather than a stage of preparation. This seems to be particularly pertinent to the group moves studied which, from the individual employee's perspective, were imposed changes often with very little time between the relocation announcement and the physical move. However, even where group moves were announced some time in advance of the physical move (as in Generation Co.'s closure of the Westville offices) individuals did not seem to progress from the denial or defence stages of coping until the physical move was imminent. The coping cycle allows for variations between individual experiences of the same change, an apparently common feature of group moves in the EGS. It also anticipates the impact of change on work performance, another seemingly consistent finding of the research. Furthermore, difficulties in managing group moves in the EGS could be linked to the failure to rebuild self-esteem. Indeed, relocation management in the EGS appeared to be typified by a lack of empathy and social support for those moving. In addition, numerous respondents complained about the lack of available relocation information and the difficulty in comprehending exactly what support was available.

A Polycyclic Model of Coping

The examination of group moves in terms of coping has identified the individual nature of the relocation experience. It has also indicated that this individual experience may be best understood in terms of two distinct cycles of transition: coping with changes in the workplace; and coping with changes in the home. Indeed, even where group moves did not involve home moves (as in the case of the Utility Co. relocation to Betaville) relocation appeared to have work and non-work effects. As figure 1 shows, there appear to be several coping cycles associated with group moves which range from the aggregated organisational experience to the coping cycles of individual members of an employee's family. These cycles seem to be interconnected, with progress in one cycle being affected by progress in others. Thus, for example, although the cessation of relocation support in the EGS may have coincided with the completion of an employee's coping cycle for workplace change, it may have been out of step with progress through their coping cycle for home changes.

By taking a polycyclic view of coping, it may be suggested that some difficulties in group moves arise because individuals have reached different stages in different coping cycles. It also suggests that relocation management may be enhanced by improving social support, training and feelings of self-control for the home side of a move. This research appeared to uphold claims that social support, or the perceptions of social support, helps individuals cope with change (see for example, 85, 86, 87, 88). It found evidence to suggest that employees who had been personally asked to relocate by their line managers coped better than those who were told of their move at a public meeting or by letter. These employees also apparently perceived that they had greater control over their move and could rely on the support of their line manager to resolve any relocation difficulties. But although the majority of employees in the sector believed that social support for relocation was inadequate, many expressed hostility towards the idea of their employer becoming directly involved in their 'private' lives.

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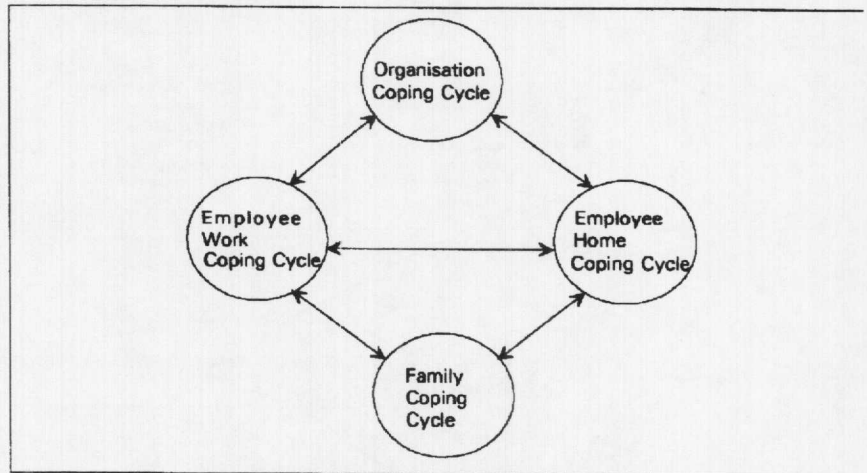


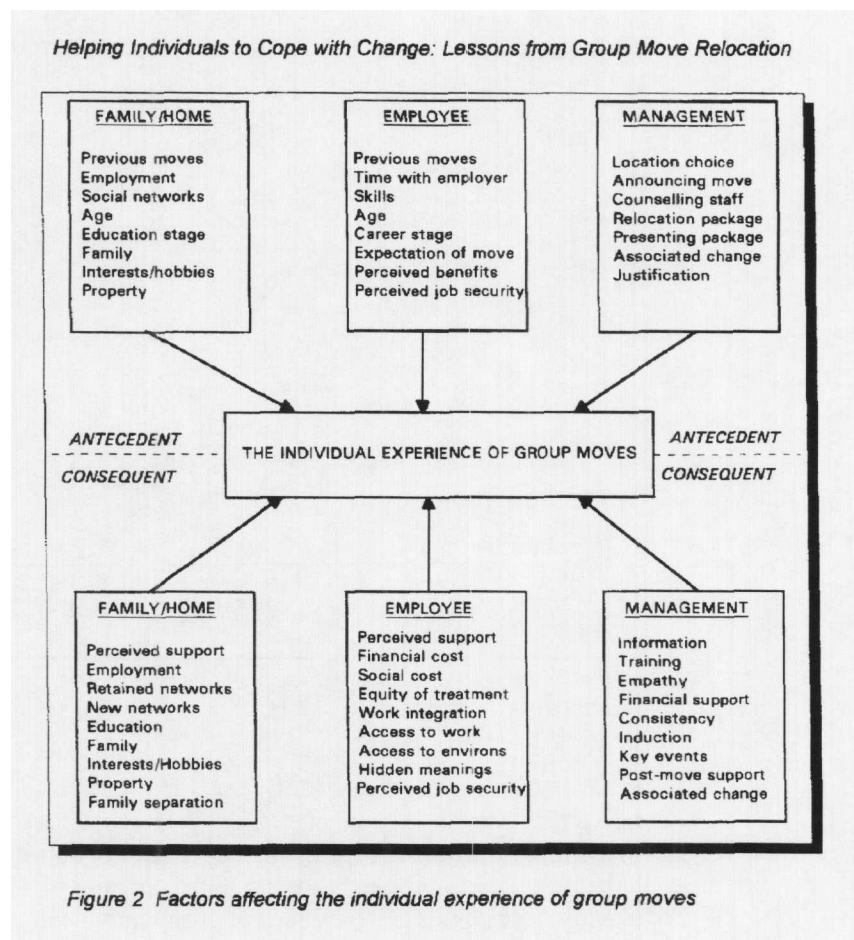
Figure 1 A schematic of links between different coping cycles

Discussion

It has been suggested that individuals involved in a group move will progress through two separate types of coping cycle: those covering the experience of work transitions; and those covering the experience of home transitions. However, individuals appear to proceed through these coping cycles in different ways. Consequently the individual experience of group moves can be described in terms of the factors which shape them (89). These factors may be separated between those that contribute towards relocation expectation (antecedent factors) and those which form the basis for perceiving the relocation event itself (consequent factors).

Coping with Group Moves

Taken in isolation each factor only provides a partial explanation of the individual experience of group moves. However, taken in combination they present a more complete explanation (see figure 2). Three groups of factors have been identified: those related to the family and home; those related to the individual as an employee; and those related to the management of a group move. Taking this view highlights one of the key differences between group moves and individual job transfers. Individual job transfers appear to be anticipated undertakings, even if their timing is not precisely known. In contrast, group moves seem to be unanticipated and thus more likely to create dissonance between family and home factors (for example the timing of investment in property) and management demands (i.e. the enforced move). The individual experience of group moves was also affected by the management of the pre-move phase of relocation, one of a series of unique management challenges created by group move relocation (90). For example, employees who were told of the move individually by their manager seemed to regard this as symbolising a recognition of their value to the organisation. In contrast, a significant number of employees felt that they were not being valued by the employer.



The antecedent features represent influences on perceptions of what group moves were expected to be like. In contrast, the consequent features represent influences on how group moves are being perceived during the move and post-move periods. It is believed that the overall individual experience of group moves is a varying one which is determined by a long-term and unravelling process of juxtaposition between the antecedent and the consequent. This is consistent with Isabella's (91) assertion that interpretations of key organisational events alter over time. Should this proposition be confirmed by other research then it may be assumed that group moves have the potential to affect organisations for some considerable time after the physical move. Perceptions of financial support typify the changing nature of the individual experience of group moves. Although property valuations were believed to have been very unfavourable when they were made, with hindsight they were believed to have been relatively advantageous. In contrast, the provision of excess mortgage assistance was perceived to be a good benefit when it was first accepted. However, over time many employees appeared to regard excess mortgage assistance more negatively as 'golden handcuffs' which tied them to the organisation.

Practical Implications

The author's research covered the dynamic and complex process of specific group moves which need to be understood in terms of their particular combination of context, content and process (cf., 92). However, a number of findings may be of



practical value to managers. These findings are intended to be flexible in their application, and consequently to be applicable in a variety of different situations including different types of organisational change. As a result, the practical implications for managing individual coping with change will be couched in terms of issues to be addressed rather than fixed solutions to be followed:-

1. Group moves may have a significant impact on the home which, in turn, could have a significant impact on the workplace (cf., 93). Organisations consequently need to be sensitive to the social side of change processes, especially to their impact on the family and home.
2. The employee experience of group moves is not comparable with the employee experience of individual relocation such as job transfers. In particular, they are unlikely to share the motivation, anticipation, opportunity and timing of individual relocation.
3. Group moves are individual experiences i.e. cycles of coping which may be experienced in different ways and over varying time frames.
4. Individual experiences of group moves seem to be continually reassessed over time, and apparently affect the employee's relationship with the employer. It is therefore suggested that the management of individual coping with change needs to be actively enacted beyond the main change event.
5. The basis of managing individual coping with group moves may lie in the rebuilding of self-esteem through the provision of empathy, support, skills and intelligible information (cf., 94). Change management in general may therefore benefit from the improved flow, clarity and availability of information.
6. The individual group move experience may also be improved if organisations: train employees and their families in skills appropriate for managing their home transitions (see, for example, 95, 96); investigate whether current approaches to relocation make employees overly dependent on organisational support; and encourage employees to develop their own change agenda (see, for example, 97, 98).
7. A critical problem affecting individual coping with group moves, and potentially with change management in general, seems to be the management of expectations. This was particularly evident in property valuations, and in comparisons between perceived relocation support and expectations of relocation support.
8. Individual work transitions might be improved if more human resource responsibilities are devolved to line managers (99).
9. Individual home transitions might be accelerated through the inclusion of families in organisation-wide social events.
10. Organisations may benefit from valuing and encouraging intuition and creativity in change management. Thus, for example, the management of individual coping with group moves may be enhanced by offering

non-financial support such as additional leave for individuals who have relocated.

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