

## ABSTRACT

Although the topic of corporate relocation has been investigated by researchers in the fields of psychology, social work, and management, sociologists have had but a fleeting interest in this major life-altering event. Consequently, little is known about how individuals experience this very human and social phenomenon. This study explores the manner in which Québécois and Ontarian employees who moved to Calgary, Alberta under the auspices of a group move experienced job relocation and the extent to which they adjusted to their new environments by drawing on qualitative data from 63 in-depth, semi-structured interviews. Focus is on the identification of some of the main components of the relocation *process* and the mechanisms that link these components sequentially. The findings indicate that employees' perception of control over the move influenced the manner in which they negotiated their decision to relocate which, in turn, affected their perception of choice to move, their psychological time frame, the manner in which they settled in the new area, and the coping strategies they utilized to facilitate their adjustment to Calgary. The regional contexts from which employees and their partners originated played a significant role in the manner in which they experienced relocation, with francophone individuals from Québec displaying discernible patterns of behavior that were markedly different from those that emerged from the Ontario sample. In highlighting the dynamics and complexity of the relocation process, this study not only sheds light on how Canadian workers experience this life event, but also brings to public attention a societal issue that is affecting more and more people.

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Per i miei genitori,

Giusto e Giannina Di Luzio,

che senza nessuna riserva, senza mai pensare al loro tornaconto, hanno sempre dedicato la loro vita ad assicurare che la mia riuscisse ad essere la migliore sotto ogni aspetto. Anche se delle volte sarà stato difficile per voi, mi avete sempre fatto fiducia; sicuri che da sola sarei riuscita a scegliere la migliore strada, e per questo vi ringrazio. Sono diventata la persona che sono perchè mi avete permesso di diventarlo; e ve ne sono molto grata.

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## CHAPTER 1

### INTRODUCTION

One of the greatest privileges we have in modern society is the ability to live, work, and raise a family wherever we choose. However, what happens when that privilege is challenged - for instance, in the case of corporate relocation - and individuals are faced with the decision to either follow their employer to a new destination or remain where they are at the potential expense of their careers? Who relocates? What are the effects of job relocation on employees and their families, and how do they adjust to their new environment? Sociologists Alvin Toffler (1970) and Vance Packard (1972) entertained these questions in the early 1970s when they documented in dismal detail the plight of the geographically mobile in their monographs *Future Shock* and *A Nation of Strangers*, respectively. However, since the publication of these treatises on corporate relocation, with a few recent exceptions (e.g., Gray 1996; Hendershott 1995; Toliver 1993), sociologists have, for the most part, expressed ephemeral interest in this life-altering event.

This lack of enthusiasm on the part of sociologists is somewhat surprising given their penchant for studying major life events (e.g., bereavement, divorce, serious illness). Although perhaps not as tragic as the examples just mentioned, job relocation remains a highly disruptive process involving significant changes in one's life that are lasting in their effects, takes place over a relatively short period of time, and affects large areas of

one's "assumptive world" (Parkes 1971:103). Moreover, in no other situation is the boundary between work and home more blurred than in the case of corporate relocation. If for no other reason than this, one would think sociological research would predominate all other studies on this topic.

A plausible explanation for this lack of attention may be that corporate relocation has been subsumed in migration research, without necessarily acknowledging the particularities that confront employees and families going through this process. While it is true that people have forsaken the familiarity of home, family, and friends in pursuit of work for centuries - their accounts of which have been well documented - there is a fundamental distinction between these types of migrants and employees who relocate under the auspices of a corporate relocation. The former, by and large, initiate the move themselves (the exception being those cases of forced migration) and migrate on their own without sponsorship of any kind. Relocated employees, on the other hand, usually relocate upon the request of their employers who, in turn, sponsor their move. As subtle a difference as this may be, the implications are significant and, for this reason, employees who migrate under the sponsorship of their employer should be considered a special case of migrants and, henceforth, analyzed in their own right.

Yet another possible explanation for the paucity of sociological research in the area of corporate relocation may be that after a couple of attempts in the early 1970s, sociologists simply deemed relocation unworthy of further sociological inquiry. Hendershott (1995:vi) alluded to this when she claimed that "social scientists had moved on to other things once they had relegated these corporate nomads to their life on a

corporate treadmill going nowhere". Assuming this is true, times have changed significantly since Toffler (1970) and Packard (1972) conducted their research. The employees and families that are relocating today are very different (i.e., a greater number of dual-career couples) from those who relocated thirty or even twenty years ago.

Moreover, the circumstances under which employees are relocating today are also different. In the heydays of the 1960s, 1970s, and early 1980s, job transfers usually involved a promotion, and the corporate male in America moved primarily for career advancement and salary enhancement (Margolis 1979; Marshall & Cooper 1976; Pahl & Pahl 1971; Seidenberg 1973). By the mid-1980s, the forces of globalization and a changing corporate culture were such that flatter corporations, leaner management, and removal of excess work quickly replaced the ethos of bureaucracy that had become anathema. It was estimated that during this time up to 250,000 employees in the United Kingdom and over 800,000 in the United States were being asked to relocate each year to accommodate corporate demands (Martin 1996; Munton, Forster, Altman & Greenbury 1993). Downsizing, rightsizing, decentralizing, and change-management became the cultural buzzwords of the 1990s, and workers and their families bore the brunt of these sweeping changes. Relocating company headquarters (group moves) became a cost-cutting initiative and, as a result, corporate transfers did not necessarily involve job promotions. Consequently, people relocated for different reasons. While some still relocated in order to accelerate their climb up the rungs of the proverbial corporate ladder, others moved to preserve their jobs. As a result of these changes, the phenomenon of corporate relocation warrants a renewed investigation.

This being said, whatever the reason may be for the scant sociological research on this particular issue, it remains, as Hendershott (1995:vi) clearly pointed out, that “few sociologists have bothered to look at what was *really* happening to those who move for work”. By contrast, researchers in the fields of psychology (e.g., Fallon, Barry J. 1997; Martin 1995, 1996; Munton 1990; Weissman & Paykel 1972), social work (e.g., Ammons, Nelson & Wodarski 1982; Bayes 1989; Richards, Donahue & Gullotta 1985), and management (e.g., Brett 1982, 1984, 1992; Brett, Stroh & Reilly 1993; De Cieri, Dowling & Taylor 1991; Gould & Penley 1985; Noe, Steffy & Barber 1988; Veiga 1983) have devoted considerable attention to the subject of corporate relocation. Psychologists and social workers have been particularly interested in the psychological impact of job relocation on employees and their families. Essentially, these researchers have found relocation to be invariably stressful and potentially devastating for the partners and children of relocated workers. Their studies have shown mobile families to suffer a myriad of physical and psychological afflictions such as depression, aggression, physical deterioration, alcoholism, prescription-drug addiction, and mental illness as a result of the move.

Researchers in management have carved out their own niche in the relocation literature by identifying the ‘types’ of people most likely to relocate and the factors most apt at predicting their ‘willingness’ to relocate. Their evidence suggests that the candidate most likely to relocate bears a striking resemblance to the “organization man” (Whyte 1956) who, motivated by intrinsic factors, will move in pursuit of his work if it means opportunities for career development and advancement (Brett, Stroh & Reilly 1993; Brett

& Werbel 1980). Among some of the factors that have been identified to predict an employee's willingness to move are: personal and career demographics, work and career attitudes, organizational norms, community ties, and spousal attitudes toward moving.

While the research on the psychological consequences of job relocation and willingness to move have yielded interesting results and provided valuable insight, inconsistent findings have been detected in the literature. Various researchers, for instance, have found that relocation is not necessarily a highly stressful experience for all relocators and their families (e.g., Brett 1982; Hendershott 1995); that individuals relocate for reasons other than career advancement (e.g., Makowsky, Cook, Berger & Powell 1988); and that spouses and children of mobile workers are not all "corporate casualties" (Seidenberg 1973) of relocation (e.g., Barrett & Noble 1973; Brett 1982; Hendershott 1995; Jones 1973). These discrepancies, therefore, indicate that the relationship between relocation, stress, willingness to move, and family adjustment is perhaps more complex than it appears.

Moreover, a critical review of the psychological, social work, and management literature reveals that little is actually understood about the underlying *process* of corporate relocation, which may explain the inconsistent results. Researchers have essentially treated relocation as a unidimensional, static phenomenon rather than a multidimensional, processual event. In so doing, they have given little consideration to the underlying dynamics that characterize the relocation experience. Relocation, the present study reveals, like any other major life change, is best described as a sequence of events that unfolds over a period of time. In other words, relocation does not begin and

end with the individual's arrival at the new destination but rather initiates from the moment the employee is notified of his/her transfer to a few months or years following the physical move. In essence, the transition is successive and recursive, with earlier events influencing later events in the sequence. Focusing on one component of the process - namely, the arrival stage - without considering those sequences of events that precede and proceed it is a methodological shortcoming that has plagued past research in this area.

Hence, given the meager and rather outdated sociological contribution in the area of corporate relocation, coupled with the inconsistencies in the literature and the lack of theoretical attention to the relocation *process*, exploration in this area is justified. Moreover, while research on corporate relocation has predominantly looked at the experiences of American and British workers, Canadian workers have not been immune to the forces of globalization and its invariable effects on the economy and the corporate culture. Their relocation experiences, however, have yet to be told.

In addition, researchers in this area have focused almost exclusively on one type of job relocation - individual job transfers - and have hardly given the less common, albeit no less significant, group moves any attention. In comparison to the former, group moves entail the geographical displacement of entire companies and their personnel and, as such, create a very different dynamic for the employees involved. The sociological literature could, therefore, benefit from more explicit attention to the relocation process and how Canadians who relocated with their companies through group moves experienced this important life event.

### The Present Study

The purpose of this study is to conduct a sociological inquiry of the relocation experiences of employees and their families in the nineties within a Canadian context. It is the aim of this study to explore the underlying process of corporate relocation by identifying some of the main 'components' of the relocation process and the 'mechanisms' that link these components sequentially. The components and mechanisms of the relocation process will be identified by paying particular attention to the influence of structural, organizational, familial, and social constraints on people's decision to relocate for work; the effect of personal motivations on their relocation decision; the significant issues that arise when negotiating whether to move or stay; and the strategies people employ to adjust to their new surroundings. Then, from Nigel Nicholson's (1987) study of transitions, the notion of the 'transition cycle' will be used as a guiding principle to propose a general conceptual framework to demonstrate how these key points in the relocation process unfold over time. Qualitative data collected from 63 in-depth, semi-structured interviews with relocated employees, partners, and families will be used to examine how this process 'works' - that is, (1) what factors influence the decision to migrate; (2) how the decision to relocate is negotiated; (3) how the relocation is managed; (4) how people adjust to their new environment; and (5) how people achieve meaning through their experience.

The goal of this project is twofold: to make a theoretical contribution to the relocation literature by highlighting the dynamics and complexity of the relocation process and offering some insight into the management of this experience, and to inform

managers at the helm of corporate policy of the issues that impede and facilitate the relocation of employees and their families. Given the rapid changes that have been occurring in the workplace over the last decade and their implications for individuals and families, relocation as a topic of research will not only shed some light on how Canadian workers and their families experience this life-altering change, but will also bring to public attention a societal issue that is affecting more and more people. On a more practical level, this study will alert the relocation industry to the social and human needs that arise when dealing with a major life event and offer various suggestions in the aim of providing a more effective and cost-efficient relocation.

Chapter 2 consists of a summary and assessment of the literature. This chapter begins with a synoptic overview of past research on corporate relocation followed by a critical assessment of this literature. In Chapter 3, I briefly address the reasons for examining this major life event within the context of Canadian society. In addition to the fact that Canadian employees have not been the subject of analysis in this particular area of research, I discuss how Canadian society presents a unique setting in which to explore the phenomenon of job relocation. How I conducted my research is outlined in Chapter 4, where descriptions of my sample, data collection procedures, and data analysis techniques are provided. I also address, in this chapter, my role as a qualitative researcher as well as the evaluation criteria and ethical considerations that are specific to qualitative research. The relocation process is discussed in detail in the next three chapters. Chapter 5 addresses the first stage of the relocation process, the 'anticipatory stage'. Chapter 6 examines the second or, 'familiarization stage', of relocation, and Chapter 7 looks at the

final, or 'assessment stage', of the relocation process. The main findings of this study and a rudimentary grounded theory of corporate relocation are discussed in Chapter 8. Directions for future research and the practical implications of this research are also suggested in this last chapter.

**CHAPTER 2****RELOCATION: PAST AND PRESENT**

Work-related migration is often perceived as reflecting an “impersonal market process whereby geographic differences in wages motivate persons to overcome a reluctance to change their place of residence” (Sell 1982: 859). Little thought is given to job-related migration in which employers initiate or directly control the process. Since the mid-1980s, employer-initiated corporate relocations have become a common occurrence in most industrialized countries as a result of rapid industrialization and technological advancement (Martin 1996). Given the numerous changes involved in job relocation and the implications for employees, their families and the organizations in question, it is no wonder that relocations of this type are a major life-altering phenomenon. With some exception, human beings are reluctant to change their current situation for a variety of reasons. They may enjoy the neighborhood and the city in which they live, they may have close friends and family members within reach, they may have family responsibilities (e.g., an ailing parent, child, or family member), they may have a spouse whose career will not permit the change, they may have teenage children in school whose friends are more important to them than life itself, they may simply like their life the way it is. The list goes on. Then one evening, a breadwinner comes home from work and announces to the family that their employer has asked them to relocate. What happens from that point on? How is the decision to move or not move negotiated within the context of the

family? What factors come into play when making the decision? If the decision was to move, how does the family adjust to the new destination?

#### Migration Literature

The migration literature has provided insight into geographical mobility and why people migrate, how they go about making their decisions to move, and how they subsequently adapt to their new surroundings. By and large, this literature has focused on the causes of migration, delineating the factors influencing migration and non-migration and determining the direction of migration. Researchers (e.g., De Jong, Abad, Arnold, Cariño, Fawcett & Gardner 1983; Greenwood 1985; Lee 1966) have postulated various explanations and sociological theories of migration. These explanations tend to be either economic or structural and social psychological in scope (Ritchey 1976).

While the economic explanations of migration focus on how market conditions, wage differentials, and human capital (age, education, skill or occupational level) affect migration, the structural and social psychological explanations are more concerned with how attributes of individuals affect their migratory behavior. In other words, these latter explanations focus on how migration is affected by life-cycle position, socioeconomic ranking, kinship and community ties, motives, aspirations, values, perceptions, and modes of orientation (Ritchey 1976:378).

The general framework for analyzing migration from a structural and social psychological perspective has been the 'push-pull model'. Everett Lee (1966:50-51), a major proponent of this model, claimed that "no matter how short or how long, how easy

or how difficult, every act of migration involves an origin, a destination, and an intervening set of obstacles". As a result, every act of migration includes consideration of positive and negative factors associated with the area of origin and that of destination; intervening obstacles such as distance, actual physical barriers (e.g., restrictive immigration laws), and costs associated with moving; as well as personal factors (e.g., life cycle/age, socioeconomic factors, community and kinship ties). From this general schema for migration, several hypotheses about migratory behavior and the characteristics of migrants have been formulated and tested.

Migration research has found that, for the most part, individuals in their late teens, twenties, and early thirties are more likely to migrate than children and young adolescents, middle-aged individuals, and senior citizens mainly because the young are more likely to be unemployed than the middle-aged and the unemployed are more likely than the employed to migrate (e.g., Masnick 1968; Ritchey 1976). Moreover, the rate of migration has been found to be directly related to socioeconomic status in that professional and white-collar workers are more migratory than blue-collar workers (Bogue 1969); the college-educated have higher rates of migration than individuals with lower levels of education (Bogue 1969; Long 1973); and higher earners are more likely to migrate than lower earners (Bogue 1969). Also, larger families with close ties to the community are less likely to migrate than smaller families with little or no ties to the community (e.g., Ladinsky 1967; Long 1972; Mincer 1978).

In terms of the decision-making process within the push-pull framework, most studies have employed the cost-benefit approach to the decision-making process where a

distinction is usually made between the push and pull factors which are then weighed in terms of their economic benefits and costs (Richmond 1988). An assumption of rational choice is implicit in this decision-making process - if the benefits outweigh the costs of migrating, then migration takes place. Conversely, if the costs of migrating are greater than the benefits, then migration does not take place.

Although migration research has produced very interesting and informative results, the majority of explanations and theories of migration "are addressed to the phenomenon of 'voluntary' migration [and] in most cases economic factors are assumed to be predominant, both in determining the outflow and in interpreting the experience after migration" (Richmond 1988:9). However, with the increasing number of international migrants (e.g., refugees, transmigrants), researchers (e.g., Richmond 1988; Wong 1995, 1997) have begun to re-evaluate traditional social theories of migration by paying more explicit attention to involuntary migration (in the case of refugees) and individuals who migrate for reasons other than, or in addition to, economic factors such as political stability, better lifestyle and standard of living, and better opportunities for children (in the case of transmigrants).

Migration as a result of corporate relocation can be either voluntary or involuntary depending on whether the employer or the employee initiates the job transfer. Moreover, although the decision to move is largely reflective of people's desire to follow their jobs, employees may relocate for reasons other than their work. Given these particularities of job relocation, some researchers have looked at job relocation as a distinctive form of

migration and, in so doing, have developed a more substantive literature on this particular topic.

Attempts to better understand this complex phenomenon have stimulated multidisciplinary research on job relocation. While some sociologists have looked at the effects of mobility in modern society, psychologists, clinicians, and social workers have dominated the literature and primarily focused on the impact of job transfers on individuals and their families. Management experts have also contributed substantially to the relocation literature. Their efforts have predominantly been aimed at identifying those factors which best predict 'willingness to relocate'.

#### Corporate Relocation Literature: Early Sociological Contributions

Job relocation as a sociological topic of concern can be traced to the early 1970s and the work of Alvin Toffler (1970) and Vance Packard (1972). These sociologists, like their forefathers - Marx, Weber, Durkheim, Tönnies, Cooley, and Parsons - were fervently engaged in documenting the many changes that were pervading modern society. One noticeable change that piqued their curiosity was the increasing mobility of middle-class workers. In those days, when the demarcation between the public and private spheres of work and home was supposedly clear, and the family home was the anchorage, the linchpin of the social order and the basis for stable governance, those who uprooted their families for work stood in sharp contrast to the ordinary folk who preferred a more stable and placid existence. Unlike the latter who adhered to a "simpler world of white picket fences, life-long friends, and permanent pews in the same old church"

(Hendershott 1995:v-vi), transferees lived in a transient world of marketable homes, temporary friendships, and yearly club memberships. These “corporate gypsies” (Packard 1972) became easy targets for sociologists who were intent on capturing the social changes of the times. Early research on job relocation, therefore, predominantly focused on: (1) identifying these transients; and (2) exposing the effects of their wayward lifestyles.

Alvin Toffler (1970) was interested in grasping the changes fostered by the “super-industrial revolution” and their effects on the “people of the future”. In his book *Future Shock*, Toffler demonstrated (1) how highly industrialized countries were “breaking with the past” at an unprecedented rate as a result of rapid technological developments and accelerated knowledge acquisition and, (2) how people were responding to this “accelerative thrust” by, among other things, renouncing permanence in their lives in exchange for transience. Relocating for work, according to the author, was one manifestation of this “temporary” culture or transient life-style that was quickly making headway in super-industrial society, along with the proliferation of “throw-away” products, portable objects, and rental options. As his research revealed, these people on the move were a new breed of transients who were clearly distinct from other people in society who had proportionally high rates of geographic mobility. Unlike the “poverty stricken and unemployed rural workers” or the “technologically backward and disadvantaged groups, such as urban Negroes”, this “new race of nomads” consisted of college-educated men who were conspicuously affluent, married with children, and working in professional, technical, and managerial fields (Toffler 1970:73-74). These

transients, in other words, were model citizens who were responding to social change in an innovative way.

Innovation, however, had a price. In his monograph, *A Nation of Strangers*, Packard (1972) went to great lengths to demonstrate how the increasing rootlessness of the American people contributed to America's ailments. Packard was interested in discovering what was happening to "community life" and, more specifically, the individual's personal sense of community, as a result of the pervading transience in American society. He found rootlessness to be clearly associated with a decline in meaningful relationships, gratifying group activities, mutual trust, and psychological stability. According to Packard, mobility did not only foster a shallowness in personal relationships and an indifference to community issues, it also promoted a hedonistic way of life.

Toffler and Packard further went on to highlight the psychological impact of transiency on transferees, their spouses and children. As a result of the social disconnectedness and loss of community that inevitably accompanied relocation, they found loosely-rooted people to be more prone to physical and psychological malaise such as coronary heart disease, cancer, depression, aggression, alienation, marital distress, substance abuse, juvenile delinquency, and lowered academic performance. To avert these afflictions or, at the very least, attenuate their effects, they concluded by recommending that efforts should be directed at the rediscovery of human community.

Taken together, Toffler and Packard's groundbreaking research was not only insightful but extremely valuable in setting the stage for subsequent research on the topic

of job relocation. Sociologists dabbled with this issue for a while, resulting in a few publications in the 1970s and early 1980s. Researchers like Pahl and Pahl (1971) and Margolis (1979) briefly addressed the subject of relocation in their examination of managers and their families by devoting a chapter or two to the inherent mobile lifestyles of these corporate jet-setters. While Pahl and Pahl (1971) were primarily interested in the socio-demographic characteristics of the mobile managers, Margolis (1979) was intent on discovering how the managers' work affected them and their families in the world outside the corporation. Her study revealed that the corporation invaded all spheres of its managers' lives, and relocation was just another instance where the looming presence of the corporation carried over into their day-to-day world.

Further research revealed that managers were not the only ones to experience corporate relocation. According to Sell's (1982, 1983) analysis of the 1973-1977 US Annual Housing Surveys data, although job transfers were most likely to occur among the higher socio-economic status occupations (i.e., jobs that required higher education levels and paid more money), they were still frequent at all levels. Similarly, Michael Mann's (1973) important case study of the relocation of the General Foods Company from the town of Birmingham to Banbury in 1965-66 demonstrated that job relocation is a major life-changing event that can affect any employee within the organization from the manual workers in the factories to the upper-level managers in the executive suites.

Moreover, although his study told the story of an entire company's relocation, the author focused on the factors that affected employees' relocation decisions. His results suggest that demographic characteristics and occupational motivations played a

significant role in the workers' decisions to move. He found that factors such as job satisfaction and future job prospects influenced the younger, non-manual employees to accept the relocation offer whereas the older, manual workers were more likely to relocate in order to maintain their position within the company. Younger employees with small children were also more likely to move for reasons that were completely unrelated to work (i.e., improved housing conditions, attractiveness of relocating area). Contrary to Mann's expectations, issues pertaining to family and community ties did not play a role in the employees' decisions to relocate.

In addition, unlike previous research reporting the negative effects of mobility on employees and their families, Mann's research revealed that overall, employees were satisfied with the move. Notwithstanding the incurred expenses and the pangs of loneliness and sense of isolation that accompanied the move, "twice as many husbands and wives were reported as thinking that they were better rather than worse off as a result of the move...[and] the move was also considered beneficial for children by their parents" (Mann 1973: 167). As a matter of fact, their satisfaction with the way things turned out was such that they had no desire to return to Birmingham.

Similarly, in her study of 256 American women's experiences with job relocation, Jones (1973) detected a positive pattern with respect to her respondents' assessment of the move. The majority of her sample reported that, as a result of the move, their ability to cope with stress improved, they had become more flexible and adaptable, they had expanded their range of interests, fine-tuned their skills in meeting people and forming friendships, and they had become more understanding and tolerant of other people,

customs, and cultures (Jones 1973:214). The move, in other words, fostered personal growth not only for the women sampled, but for their children and spouses as well.

Hence, job relocation and its effects on employees and their families is far from being a simple issue. Although the complexity of this social phenomenon became apparent in the work of sociologists in the 1970s and early 1980s, there has since been very little sociological interest in this topic. Sociologists may have neglected the study of relocation, yet researchers from various disciplines - most notably psychology, social work, and management - have since carried on and made significant strides in the development of this substantive literature. Since the mid-1970s, two dominant bodies of work have characterized this area of research. While the sources and effects of psychological stress incurred as a result of relocation became the primary focus of psychologists, clinicians, and social workers, researchers in the field of management have been predominantly engaged in exploring the factors with the greatest potential for predicting the 'type' of person/family most likely to accept a relocation offer.

#### Insights From Psychologists, Clinicians, and Social Workers

Given that job relocation involves a simultaneous job and geographical move, this phenomenon entails making significant changes in one's life (Lev-Wiesel 1998). Change is necessarily disruptive and while it is embraced by some, it is spurned by others. Apart from the uncertainty or threat of the unknown that inevitably accompanies any form of change, there are gains and losses to making the change. Although researchers (e.g., Brett 1982; Pinder 1988) have alluded to some of the gains to moving

for work, such as the accrual of personal growth, satisfaction, financial security, and fringe benefits to name a few, the literature for the most part has focused on the losses incurred from job relocation. These losses range from the physical loss of home and personal objects to the psychological and emotional loss of extended family, friends, kin support networks, familiarity of place, and identity. These losses, in turn, have had a major impact on the psychological well-being of relocated families.

*The Cost of Relocating: Losses Incurred*

The loss of home and personal objects as a result of a move are inevitable and oftentimes painful. However, the implications of moving to a new destination for people have generally emphasized the loss of family, friends, neighbors - in short, on the loss of community. Brody (1969) and Pierson (1973) in their research have addressed the loss of meaningful personal relationships, community, and kinship as a result of relocation. Brody (1969:7) stated that in addition to the loss of support provided by social and geographic familiarity, the relocating individual experienced the loss of "long-term relationships and values which were built into him while growing up".

Although these losses are an integral part of the move and difficult for every participant in the relocation process, they have been documented in the literature as being especially traumatic for the partner of the relocating employee - usually, the woman (Ammons et al. 1982; Bayes 1989; McCollum 1990; Seidenberg 1973). According to Ammons, Nelson and Wodarski's (1982:209) findings from their study of 122 recently transferred executives and their families, "after relocation women experienced the 'negative' emotions of boredom, loss, depression, and loneliness to a significant degree

more than men". As Seidenberg (1973) pointed out, unlike most women, men have their work and the associates that invariably come with it, not to mention the opportunities provided by business trips, to maintain past friendships and acquaintances. The loss of friendships as a result of the move is, therefore, more deeply felt by women who may not have the same luxury of "having someone to talk to" (Seidenberg 1973:34).

In addition to not having someone to converse with, the basic foundation on which women's friendships are built and the significance they attach to them makes losing them all the more difficult. According to Bayes (1989:283), women invest a lot of time and effort in cultivating their friendships and "in the safety of these mutually nurturing relationships, women achieve self-definition and enhanced self-esteem, and find an empathic context in which growth can occur". The loss of such friendships, therefore, can be emotionally devastating for women who relocate. Similarly, in her exploratory research on the personal experiences of relocation of 42 women over two years, McCollum (1990) commented on how the loss of meaningful friendships kindled profound grief. The reality of "being unrecognized, unresponded to, uncared about - not existing in the consciousness of others...being utterly alone" upon relocation exacerbated the loss experienced by these women (McCollum 1990:82).

Children, especially teenagers, have also been reported to experience a tremendous sense of grief as a result of losing their friends. Children frequently do not want to move (Harvey 1985). As Munton et al.'s (1993:22) findings revealed, when asked what aspect of the move concerned them most, children put loss of friends at the top of their lists. Adolescence is a critical time in a child's life when, in their quest for

independence, they break away from their parents and rely on their friends for support. Their world essentially revolves around their friends and their school (Harvey 1985). As a result, after moving, “the adolescent may experience a deep sense of loss on leaving behind a solid peer group” (Coyle 1993:7). According to Pinder’s (1988:53) research, “broken friendships and romances..., and the general insecurity caused by leaving familiar surroundings during a difficult time of life” were the most important hardships experienced by teenagers during the move.

This combined loss of friends, family, neighbors, and associates, or what Weiss (1969:204) referred to as loss of one’s “social envelope” or “group frame”, was found to have a profound effect on relocated individuals. According to Weiss (1969), the loss of established relationships contributed to an extreme sense of social isolation. In addition to loneliness and social isolation, the loss of such relationships often translated into a loss of personal identity. In their examination of community loss, Seidenberg (1973) and Gaylord (1979) employed Durkheim’s concept of “anomie” to describe the condition of individuals who suffered this loss as a result of relocation. They found anomie, “a feeling of disorientation, a not knowing exactly who you are or where you are in time and place” (Seidenberg 1973:28), to be a common reaction to the loss of traditional community supports among those who moved to a new area. In a state of “anomie”, people begin to merely exist rather than live a purposeful life. This was especially the case for relocated women who realized soon after relocating that the part of their identity that was dependent upon the recognition of others was not easily transferred.

The losses incurred from relocation and the feelings of loneliness, isolation, and anomie that invariably accompanied these losses, were believed to have a significant effect on the psychological well-being of relocated families. After all, as Tiger (1974:139) pointed out, these families were being “deprived of a fundamental human requirement of social continuity and personal stability” at a time when they needed it most. Therefore, relocated individuals were assumed to be suffering from significant amounts of stress as a result of the losses they endured. This relationship between job relocation and psychological stress subsequently became one of the focal interests of researchers in this area.

***Paying the Price of Relocating: Psychological Stress***

Extensive research in the area of job relocation has centered on the psychological consequences of relocation. The assumption among many researchers is that job relocation is a highly stressful event (Luo & Cooper 1990). Change, whether it is perceived as positive or negative, is stressful in and of itself (Holmes & Rahe 1967). Moreover, given that under the best of circumstances changing job and changing residence are individually stressful life events, it is assumed that when they take place simultaneously, very high levels of stress will be experienced by relocating individuals (Martin 1996).

Empirical research into the ‘stressfulness’ of the relocation process, however, has yielded inconsistent results. On the one hand, research has shown that job relocation is indeed a stressful life-changing event for a variety of reasons (e.g., Ammons et al. 1982; Anderson & Stark 1985; Gullotta & Donohue 1981; Harvey 1985; Munton 1990; Munton

& Forster 1990; Vanhalakka-Ruoho 1994). According to Ammons, Nelson, and Wodarski's (1982:208) findings, relocation was considered to be a stressful experience because it involved a "simultaneous reduction in coping [resources]". Similarly, in his study of 111 relocated British employees, Munton (1990:404) examined the relationship between job relocation and stress and discovered that "seventy-five per cent of [the] sample rated relocation, overall, as more than slightly stressful, whilst 40 per cent found it to be 'quite a bit' or 'very' stressful, [therefore]...suggest[ing] that perceived stress is a common feature of job relocation". In addition to work factors, he found that loss of social networks as well as problems related to spouse employment and children's educational needs contributed significantly to the overall stress of relocation. Results from a survey conducted in the high technology field by Anderson and Stark (1985) also confirmed relocation to be a stressful event for both employees and their families, particularly when the move was ordered by the corporation and perceived as involuntary or highly undesirable by the employee and his family.

Research further revealed that this relationship between relocation and stress was particularly strong among partners (usually female) of relocating employees, oftentimes referred to in the literature as 'trailing spouses' (e.g., Bayes 1989; Butler, McAllister, & Kaiser 1973; DeCieri et al. 1991; Martin 1996). Due to the fact that the losses incurred from relocation were more poignant for women than men, research has shown that the relocation experience has turned out to be more stressful for women as a result (Butler et al. 1973; Coyle 1993; Seidenberg 1973; and Weissman and Paykel 1972). According to DeCieri, Dowling, and Taylor's (1991) findings, feelings of isolation was the most

frequently cited reason for the greater levels of stress of female partners. Although men had their share of stress to deal with, such as learning new tasks in a new environment and getting the family settled in a new place (Jennings 1967; Marshall & Cooper 1976; Renshaw 1976), women lacked or, better yet - lost, the proper resources to channel their stress and thus rendered their experience all the more stressful. As Bayes (1989:282) clearly stated:

The partner for whom the move has been made may experience stress also, such as pressure for performance, but has an organization to welcome and contain him, offering colleagues, connections, work and recreational activities, and status enhancement. The accompanying partner enters as an uninvited stranger.

Women's experiences with relocation were also found to be more stressful as a result of their diminished role in the relocation process. Given the fact that relocation occurred mainly as a result of the husband's job being transferred, wives' perceptions of lower amounts of control over moving were significantly related to their higher stress levels. According to Gaylord (1979), the loss of power experienced by women who were unable to exercise free will in the decision to relocate made the move more stressful for them than their husbands who were in full control. Similarly, Weissman and Paykel (1972) and Hooker (1976) found lack of perceived control in the decision to relocate to be the most influential factor affecting women's level of stress following a move. Cardwell (1980) substantiated the latter's position that the partner's lack of participation in the actual recruiting process where a relocation decision was involved contributed to rendering the process more stressful than it otherwise could have been. Moreover, this lack of control in the decision to relocate made the move particularly stressful for women

who were employed at the time of relocation. As Bayes (1989:284) pointed out, “the inability to find satisfying work, being demoted in one’s profession, lowering one’s career goals, feeling diminished professionally [as a result of relocation were] all major stressors”.

In addition to the losses endured as a result of the move and the lack of perceived control in the decision to relocate, the fact that it was largely incumbent upon the wives and mothers to render the transition as smooth as possible for the sake of the entire family is yet another reason why relocation was found to be more stressful for women than men. According to Bloomfield and Holzman (1988:186), “the family relie[d] on the mother to create the feeling of a secure home [and] whether employed or not, she [was] more likely to feel responsible for setting up the new household, and meeting her children’s intensified needs for nurturance”. During a time when she, herself, had many adjustments to make (e.g., loss of family, social networks, and possibly career), the added pressure to look out for the concrete and emotional needs of the family did little to assuage her level of stress.

Culture shock, a psychological reaction that is “precipitated by the anxiety that results from losing all our familiar signs and symbols of social intercourse” (Oberg 1960:177), has been demonstrated in the literature to contribute to the inducement of stress among relocated individuals (Bloomfield & Holzman 1988; Hulewat 1996; Oberg 1960; Smalley 1963; Stessin 1973; Zapf 1993). This is particularly true for those involved in international relocation. Cultural differences in customs surrounding, for instance, the practice of shaking hands, the amount of space between two people involved

in a conversation, and the handling of time, have been shown to bring on feelings of discomfort. While it may appear 'normal' to a North American businessman to shake hands as a form of greeting, stand approximately two feet away from a person when talking, and arrive at someone's home for dinner no later than 15 minutes, it may not be appropriate in Japan, Argentina, or Germany. Consequently, as Smalley (1963:49) put forth, "the loss of these cues when we enter a new culture means strain, uneasiness, and even emotional maladjustment because the props have been swept away from under us and we no longer have a familiar foundation on which to stand". This cultural disorientation is magnified when the language of the host country differs from that of the country of origin. In his study of relocated social workers in remote northern Canadian communities, Zapf (1993) found that the level of stress associated with culture shock was highly significant, particularly among those whose job was located in a community where no colleagues were present.

Moreover, for the same reasons mentioned above, studies have shown that women suffered from the stress of culture shock to a greater extent than men (DeCieri, Dowling & Taylor 1991; Harvey 1985; Stern & Cousins 1985; Tung 1982; Zapf 1993). Expatriate wives were found by Harvey (1985) to be particularly susceptible to experiencing distress in response to their new environment and circumstances. According to Zapf (1993:700), the finding that women reported significantly more stress than men may be due to the fact that women "encounter[ed] more ongoing resistance and role conflict than a man because of higher role expectations in the home, at work, and in the community". It may also have to do with the fact that while men were at work with their relocated colleagues, women

were at home dealing with the day-to-day in an environment that was completely foreign to them. The stress brought on by culture shock was oftentimes intolerable and a return to the country of origin was necessary. Tung's (1982) empirical research on expatriate American managers demonstrated that the inability of the partner to effectively deal with the stress of a different physical and cultural environment was the main reason for failure of the expatriate to complete an overseas assignment.

The level of stress experienced as a result of relocation not only differed for men and women but also varied among women so that some were more prone to stress than others. For example, educational attainment was found to influence women's level of stress in Makowsky, Cook, Berger and Powell's (1988) study of 94 relocated women in the Colorado and Wyoming areas. Their findings revealed that in comparison to women with a college education, women with a high school or trade school education experienced more stress as a result of relocation. According to the researchers (Makowsky et al. 1988:119), "perhaps women with high school/trade school education have more stress because they have access to fewer resources that could help to reduce the stress of a move (i.e., interpersonal skills or financial ability to hire movers)".

Husband's employment and the demands it imposed on employees and their families was another factor that explained the variation of stress in women. Researchers (e.g., Mederer & Weinstein 1992; Wiggins-Frame & Shehan 1994) have demonstrated that, in contrast to corporate wives, military and clergy spouses had to deal with the imposition of formal and informal demands which rendered their relocation experience more stressful as a result. In a rare study of relocation among clergy families, Wiggins-

Frame and Shehan (1994) contended that the formal expectation of clergy wives to abide by the itinerancy system of assignment of the church that required clergy to relocate every four years, was indeed stressful. However, the stress level for these women was exacerbated by the informal expectation to participate in ecclesiastic activities and make it appear that all was well and good in the marriage and family. Although the repeated loss of social networks was the main contributor to stress for these women, the aggravating factor was the "subtle form of sexism" surrounding the fundamental organizing principle of the itinerant system that infringed on their right to employment and self-fulfillment (Wiggins-Frame & Shehan 1994:203).

While the overwhelming majority of researchers have claimed that relocation is a stressful experience, especially for the partners of relocated employees, not all studies came to the same conclusion about the relationship between relocation and stress (Brett 1982; Glueck 1974; Landis & Stoetzer 1966). Research conducted by Landis and Stoetzer (1966) and Glueck (1974) found that stress-related problems in relocated families were generally absent. Moreover, according to Brett (1982:450), the prevalent image of the victim-wife was not only unsubstantiated but was grossly exaggerated by "research popularizers...to sell the idea that mobility [was] damaging to the well-being of the American family". Her survey analysis of 500 employees from five companies revealed that the differences between mobile and stable people were minimal. As a matter of fact, with the exception of reported dissatisfaction with social relationships, her data showed that despite their mobility, employees and their wives were reported to be as satisfied with all aspects of their lives - including their families and their marriage - as their stable

counterparts. The relocation process, therefore, appeared to have little impact on the well-being of employees and their families.

Given this discrepancy in the literature, the results pertaining to the stressfulness of relocation are inconclusive. However, due to the paucity of research on the positive effects of relocation, researchers for the most part have continued to depict relocation as a stressful life-changing event. Studies on the deleterious effects of stress on the geographically mobile have been prolific as a result.

#### *The Impact of Relocation*

Considerable research has focused on the impact of geographic mobility on family members' well-being. In keeping with the unfavorable image of relocation provided by Toffler (1970), Packard (1972) and the many researchers writing on the topic of mobility and stress, studies on the impact of relocation have primarily been directed toward investigating the negative repercussions of relocation on families. This, of course, does not mean that there are no positive aspects of moving. On the contrary, research (e.g., Brett 1982; Levin, Groves & Lurie 1980; Pihl & Caron 1980) has revealed that relocation in fact can bring about "excitement, challenge, opportunit[ies] to start anew, enhancement of status" (Levin et al. 1980:324). Studies on the positive effects of moving, however, are extremely limited. What has received by far the most attention in the literature has been the unsuccessful adjustment of relocated women. While research on the impact of relocation on men has focused essentially on career development and associated work stress, studies on the impact of relocation on women have concentrated mainly on personal development (Richards, Donohue & Gullotta 1985).

Research has suggested that the inability to adapt to the changes and stresses created by relocation resulted in significant mental health problems among women (Seidenberg 1973; Weiss 1969; Weissman & Paykel 1972). The relocated partner has been diagnosed as suffering from a host of stress-related symptoms - referred to in the literature as the "mobility syndrome" (Seidenberg 1973). The symptoms include depression, deterioration of health, little community involvement, strong dependency on the marital union for emotional satisfaction, a significant rate of alcoholism, pervasive feelings of social anonymity, diffusion of individual responsibility for social acts resulting in lack of involvement, destructive aggression, marital discord, and high divorce rate (Anderson & Stark 1988). During the course of examining a group of depressed women in Connecticut, Weissman and Paykel (1972) noted a high correlation between their mental depression and moving. This was true whether the move was perceived as being beneficial for the family or not. Similarly, in their study on the mental health of relocated individuals, Butler, McAllister, and Kaiser (1973) found that mobile females were especially more likely than mobile men to report symptoms of mental disorders regardless of whether the move was voluntary or involuntary. Seidenberg (1973) attributed the lower mental health of women to the fact that, unlike their husbands, they were the ones who were called upon to make an inordinate amount of personal compromises during the relocation process.

However, as was the case for the relationship between relocation and stress, inconsistencies have been detected in the literature regarding the effect of relocation on female partners. According to more recent research conducted by Wamboldt, Steinglass,

and De-Nour (1991) on the relocation experiences of 18 Israeli couples, there were no significant gender differences in levels of coping, demoralization, or social adjustment at either the pre-relocation phase or at the two-year follow-up. In other words, “over the course of a stressful life event, the vast majority of individuals within couples adjusted in synchrony as a ‘family system’” (Wamboldt et al. 1991:354).

Researchers also devoted some time to studying the impact of mobility on children. Generally, studies of mobile children have looked at the effect of mobility on academic achievement and social adjustment (Bloomfield & Holzman 1988). Popular magazines as well as early research studies suggested that moves were the cause of such problems as school phobias, poor academic achievement, and other adjustment difficulties (Gordon & Gordon 1958; Stubblefield 1955). In their research, Gordon and Gordon (1958) found that rates of emotional disturbances in children were higher in transient areas. Similarly, Stubblefield’s (1955) findings revealed that children were more likely to experience emotional trauma following a move, especially when they suffered great losses or were ignored by their parents. According to Gaylord’s (1979) research, children between the ages of 3 and 5 often experienced emotional difficulties and those between 14 and 16 largely suffered from social frustrations.

More recent research, however, has disputed these early findings (e.g., Blair, Marchant & Medway 1984; Cornille, Bayer & Smyth 1983; Holland-Jacobson, Holland & Cook 1984). Although researchers acknowledged the fact that relocation created a disruption for children, they also found inconclusive evidence regarding the long-term effects of mobility on children. In their study of 309 relocated children between the ages

of six and eighteen, Stroh and Brett (1989) found neither short nor long-term effects of mobility on children's adjustment in the five developmental domains of social, behavioral, school, health, and self-efficacy skills. Barrett and Noble's (1973) findings also revealed that mobile children between the ages of three and eighteen were not different from a random sample of their peers on the Louisville Behavioral Check List that measured aggression, inhibition, learning disabilities, and total disabilities. On the contrary, survey results indicated that the overall effect of moving was either 'good' or 'none'. Moreover, in contrast to earlier studies that emphasized the negative impact of relocation on children, Mann's (1972) research on residential mobility demonstrated that mobile college students not only had a greater tolerance for new or uncertain situations but also exhibited less anxiety in stressful situations, and placed greater value on autonomy, independence, and adaptation than stable students.

#### ***Minimizing Impact***

Given the discrepancies in the literature, studies on the impact of job relocation are inconclusive. However, the fact remains that relocation is a disruptive life event that, if not handled properly, may result in serious problems. For this reason, studies in this area have not only been theoretical in nature but have also been directed at practical ways of attenuating the dire effects of relocation. Researchers have put forth various strategies that both employees and employers can implement to facilitate the relocation process. These strategies primarily focus on providing adequate preparation before the move. As Vanhalakka-Ruoho (1994:150) clearly stated, "the procedure by which the organization delivers information at the beginning of the relocation process has a significant effect on

the experiences of the employees". With this in mind, researchers have suggested that employers can do the following to render the process as stress-free as possible: make available the relevant and accurate knowledge and information about the relocation plans to its employees as soon as possible; provide employees and their families with an adequate amount of time to decide and prepare for the event; furnish useful and necessary information about the new location (i.e., availability of public transportation, schools, safety, cultural centers, child-care facilities); invite the family to visit the new community; organize seminars on how to prepare for a major relocation, including anticipated fears about making the move; invite individual speakers to talk about their own adjustment experiences; provide telephone networking systems where settled families can connect with newly relocated families; provide transition counseling in the form of a list of feminist family therapists or professional relocation consultants; offer their own support group activities or work cooperatively with community agencies (i.e., newcomer's clubs) (Ammons et al. 1982; Anderson & Stark 1985,1988; Gaylord 1979; Lundy 1994).

Involving the employee's partner in the relocation decision-making process is another strategy that employers can use to minimize the occurrence of unsuccessful relocations (DeCieri, Dowling & Taylor 1991; Hardill & MacDonald 1998). Given the fact that moving affects every member of the employee's family, it only makes sense to involve both the candidate and the spouse in the relocation decision. As was mentioned earlier, lack of perceived control in the decision to relocate contributed to high levels of stress in women. Involving them in the decision-making process can potentially reduce

some of that stress. According to Cardwell (1980:53-54), "with involvement and participation will come a clearer understanding and a greater commitment and ownership with the move". A technique to ensure the involvement of the spouse is to have her formalize a list of what she would like for herself, her husband and her children in the relocation (Cardwell 1980).

Involving children in the relocation process has also been suggested as a strategy that parents and employers can employ to facilitate the transition for children. Researchers have argued that employees and their spouse should discuss the move with the children, provide them with as much information and support as possible, and encourage the children to express their opinions about moving (Bloomfield & Holzman 1988; Harvey 1985). Fisher and Greenberg (1983) have advocated company endorsement of workshops with innovative approaches to involving children in the relocation process. These workshops should focus on telling kids why they are moving, answering questions about the new community, and help get them started on planning their new life in the new area. According to the authors (Fisher & Greenberg 1983:64), "by directly involving children in the relocation process..., children begin to feel less like 'victims' and more that someone cares,...that the move is manageable, and that they just might like this new area".

Researchers have also identified strategies that employees and their spouses can employ to reduce their level of anxiety. One of the major sources of stress identified earlier was the loss of community upon relocation. Sociologists and psychologists working in the area of major life events have documented how social support and coping

resources can buffer the deleterious effects of stress brought on by this loss (Thoits 1995). Researchers have, therefore, strongly recommended becoming active in the new community, making friends, and developing a social support network to counter the possible onset of loneliness, isolation and depression (Gullotta & Donohue 1981; Harvey 1995). In addition, the couple and their children can provide emotional support for one another in the form of trust, empathy, attention, and affection, and employers can help by providing instrumental and informational support by way of resources, facts, opinions, and advice.

Having said all this, there is no question that job relocation is a major life change - the ramifications of which affect not only the employees in question but their partners and children as well. Even the best moves have their share of problems, therefore, the effects of relocation cannot be underestimated. For this reason, relocation - like any other life change - involves an element of risk. If relocation is such a disruption in people's lives, one may well ask who would be prepared to meet the cost and potential risk of relocating? In other words, what factors influence individuals to leave everything behind and move to a new environment? Experts in the field of management have tackled this question for years. Their studies for the most part have been aimed at identifying the factors that best predict one's willingness to relocate.

#### Management Research

The 'face' of corporate relocation has changed over the years. The people who are relocating today are very different from those who relocated 40, 30 and even 20 years

ago. Back in the 1960s, 1970s, and part of the 1980s, the corporate family displayed essentially the following characteristics: (1) the husband was the principal wage-earner who held a position at or just beneath the upper management level; (2) the husband in all cases worked an average of six days a week, often ten to twelve hours a day; and (3) the wife may have had a job outside the home, however, she was primarily a homemaker, housewife, and mother (Gullotta & Donohue 1981:109). The “organization man” (Whyte 1956) was essentially career and money-driven and relocation in the form of a job transfer was often the ticket to ensuring career advancement and salary enhancement. Times have changed, however, and although people still relocate for career and money reasons, some relocate in order to keep their jobs, others do so because it is an integral aspect of the industry in which they work (e.g., military, clergy, geological research), and still others relocate for personal (non-work related) reasons. As a result, employees on the move are no longer necessarily upper-level managers who average 72-hour work weeks.

Moreover, society has changed and to be more specific, the demographic characteristics of the labor force have changed. Not so very long ago, the American and Canadian workforce consisted primarily of white, anglo-saxon males. Non-whites and women have, since the mid-1970s, been entering the workforce in droves (Taylor & Lounsbury 1988). As a result, relocation is no longer exclusive to white men. In light of these changes, experts in the field of management have been intrigued by the factors that influence employees’ decisions to relocate. From an organizational perspective, “identification of employee characteristics that may influence willingness to accept various movement options is important...in order to identify employees who may

respond favorably to movement opportunities and to develop appropriate reward systems to motivate employees to accept mobility opportunities” (Noe, Steffy & Barber 1988:561).

Most of the research in management, therefore, has focused on factors which predict willingness to relocate. Although willingness to move is not the same as the actual act of moving, researchers have established that it is a relatively good predictor of it (Brett & Reilly 1988; Markham, Macken, Bonjean & Corder 1983). In a synoptic review of the literature, Brett, Stroh and Reilly (1992:325) identified seven factors which have been found to predict willingness to relocate for career advancement: personal demographics; career demographics; work attitudes (including attitudes toward moving); career attitudes; organizational norms; community attachment; and spousal attitudes toward moving. The majority of studies found that those most willing to move for work were more likely to be young, male, white, single with no or very few children, with few community ties, and, if married, with an unemployed partner. In addition, they were more inclined to believe that their future with the company looked promising and that relocating was necessary to advance within the company. However, like the psychological, clinical, and social work literature on relocation, there is no consensus in the management literature on which factors best predict willingness to relocate. While some studies found factors to be strongly associated with willingness to move, others found no such relationship or only a moderate association.

***Personal Demographics Factor***

A significant amount of work has been done on the personal demographic characteristics of movers (e.g., Brett & Reilly 1988; Brett, Stroh & Reilly 1992, 1993; Gould & Penley 1985; Marshall & Cooper 1976; Markham, Macken, Bonjean & Corder 1983; Markham & Pleck 1986; Noe, Steffy & Barber 1988; Swanson, Luloff & Warland 1979; Veiga 1983). Researchers have looked at the influence of variables like age, race, education, marital status, children at home, gender, partner employment status, and income on employees' willingness to relocate. Empirical evidence indicates that none of the variables listed above show a consistent pattern of results. While certain studies found that female employees were less likely to relocate than males (e.g., Markham, Macken, Bonjean & Corder 1983; Markham & Pleck 1986), non-whites were less willing to move than whites (e.g., Edwards & Thomas 1989), and employees with more children at home were less likely to relocate than those with less or no children at all (e.g., Brett & Reilly 1988), other research findings (e.g., Brett, Stroh, & Reilly 1993; Lichter 1982) reported no significant relationship between gender, race, children at home and willingness to relocate.

Researchers also came to different conclusions over time. For instance, a study on Hispanic employees conducted by Edwards and Thomas (1989) revealed that non-whites were less likely to relocate than whites. However, four years later, further research by the same authors (Edwards, Rosenfeld, Thomas & Thomas 1993) showed that, when certain incentives accompanied the move (i.e., a 20% pay raise, paid moving expenses), the original relationship between race and willingness to move all but disappeared.

According to Brett, Stroh & Reilly (1993:55), “these findings suggest that in the 1990s, neither sex, race, nor number of children should be used as a surrogate measure of willingness to relocate”.

In terms of the effects of age, education, income, and marital status on willingness to relocate, the results are also mixed. On the one hand, studies suggest that older employees were less willing to move than younger employees (e.g., Brett, Stroh & Reilly 1992,1993; Gould & Penley; Marshall & Cooper 1976; Veiga 1983) and, on the other hand, researchers like Brett and Reilly (1988) found no significant relationship between age and willingness to move. While some studies found higher levels of education to increase employees’ propensity to relocate (e.g., Anderson, Milkovich & Tsui 1981; Lichter 1982; Spitz 1986; Swanson, Luloff & Warland 1979), others (e.g., Brett & Reilly 1988; Brett, Stroh & Reilly 1993) found no positive correlation between education and mobility. Income, whether measured as employee income or family income, was sometimes found to be negatively associated with willingness to relocate and other times positively associated. Researchers like Brett, Stroh and Reilly (1993) and Markham and Pleck (1986) found employees who earned less to be more willing to relocate than those who earned more, however, Gould and Penley (1985) reported the opposite - employees who made more money were more likely to relocate. According to the authors, individuals with high salaries were not only in a better position to receive relocation opportunities as a result of their “higher exposure and visibility”, but they were also in a better position to assume the “financial risks of relocation” than those with lower salaries (Gould & Penley 1985:472-473). The hypothesis that singles were more likely to relocate

than married employees was confirmed by some (e.g., Markham, Macken, Bonjean & Corder 1983) and rejected by others (e.g., Brett, Stroh & Reilly 1992,1993; Noe, Steffy & Barber 1988).

Like all the other variables, the results regarding the influence of partner employment status on employees' willingness to relocate are tentative at best. While some have argued and demonstrated through empirical research that employees with employed partners were less likely to move than those with unemployed partners because of the possibility of job loss for the partner (e.g., Brett & Reilly 1988; Markham, Macken, Bonjean & Corder 1983; Markham & Pleck 1986; Maynard & Zawacki 1979), others found no support for the hypothesis that employees in a dual-wage-earner family were less likely to relocate (Duncan & Perrucci 1976; Lichter 1982; Noe, Steffy & Barber 1988). Some findings (e.g., Blomquist 1982; Gould & Penley 1985), in fact, even suggested the contrary - that employees with an employed partner were more willing to relocate. According to Gould and Penley (1985:476-477), a plausible explanation for this may be that "employees in dual-wage-earner families are reported to have lower organizational involvement than persons in single-wage-earner families, and so have less attachment to their current job and community". Another possibility is that the partners in that study were more mobile because they held lower-level jobs of the kind they could easily find elsewhere (Noe et al. 1988). In fact, when a distinction between dual-wage earners and dual career couples was made, some researchers found that employees with partners who had careers were less likely to relocate than those whose partners were either unemployed or not pursuing a career (Harvey 1995). Others, however, found no

significant relationship between employees in dual career relationships and willingness to move (Taylor & Lounsbury 1988).

***Career Demographics Factor***

The empirical literature on the relationship between employee willingness to relocate and career demographics also shows a mixed pattern of results. A select number of variables like number of prior moves, company tenure, job tenure, and organizational level have been examined in terms of their effects on employees' willingness to move. While the results of research studies carried out in Britain in 1987 at the Institute of Manpower Studies found employees who had experience with relocation to be more likely to relocate again (Shortland 1990), other studies (Brett and Reilly 1988; Brett, Stroh and Reilly 1993) have consistently failed to find a relationship between level of prior moving and willingness to relocate. With regards to company tenure, Anderson, Milkovich and Tsui (1981) and Meyer & Allen (1984) found that employees who had been with the company for a longer period of time were more likely to relocate in comparison to those who had been employed by the company for a shorter length of time. However, Brett and Reilly (1988) and Veiga's (1983) findings indicated the reverse - namely, that the shorter the company tenure, the greater the employees' willingness to relocate. Moreover, subsequent research by Brett, Stroh and Reilly (1993) revealed the ineffectiveness of company tenure as a predictor of employee willingness.

Similarly, empirical evidence of the relationship between job tenure and willingness to relocate is inconsistent. Noe, Steffy, and Barber (1988) contended that employees who had been at their particular job for a shorter period of time demonstrated

more willingness to relocate, whereas Gould & Penley (1985) found the reverse. In terms of organizational level, some researchers (e.g., Markham, Macken, Bonjean & Corder 1983) reported that higher level employees were more willing to move, however, others (e.g., Brett, Stroh & Reilly 1993) found employees' level within the organization to not be a significant predictor of willingness to relocate.

#### *Work Attitudes Factor*

Willingness to relocate has oftentimes been viewed as an indicator of employees' commitment to career and the organization (Coyle 1993; Shortland 1990). In testing whether the relationship between work attitudes and willingness to relocate was significant, researchers used the following independent variables: company identification, organizational commitment and loyalty; job involvement, and job satisfaction. Research revealed that company identification, organizational commitment, and loyalty to the organization as well as job satisfaction had no significant effect on employees' willingness to move (e.g., Brett & Reilly 1988; Brett, Stroh & Reilly 1993; Noe, Steffy & Barber 1988; Pinder 1977). As for job involvement, Brett and Reilly's (1988) findings demonstrated a positive relationship so that the more involved employees were in their work, the more willing they would be to relocate. Gould and Penley's (1985) results, however, indicated the reverse. According to the authors, job involvement entailed a strong attachment to a job and, therefore, "involved individuals were less likely to consider relocation as a means of increasing career options" (Gould & Penley 1985:477). Research conducted by Brett, Stroh and Reilly (1993) revealed that job involvement was not a significant predictor of willingness to relocate.

***Career Attitudes Factor***

Various researchers have examined the relationship between career attitudes and willingness to relocate. Noe, Steffy and Barber (1988) found that the greater the distance employees perceived they were from their career goals, the more willing they were to relocate. Similarly, studies (e.g., Brett & Reilly 1988; Brett, Stroh & Reilly 1993; Markham & Pleck 1986; Noe, Steffy & Barber 1988; Veiga 1983) have indicated that the more committed employees were to their career, the more satisfied they were with their career, and the greater the opportunity for career enhancement and advancement in the new location, the more likely they were to relocate. Moreover, researchers like Noe, Steffy, and Barber (1988) hypothesized that employees in the trial (or initial) and advancement stages of their career would be more willing to relocate than employees in the maintenance (or last) stage of their career. Their results supported their hypothesis. Employees in early career stage were more willing to relocate than were individuals in later career stages.

***Organizational Norms Factor***

Researchers (e.g., Brett & Reilly 1988; Brett, Stroh & Reilly 1993) also found that job specialization played a significant role in willingness to relocate. In their research, Brett and Reilly (1988) found that employees working in sales, operations, and marketing were more predisposed to relocating than those in other areas. The reason for this, they argued, was that employees in those particular domains were well aware of the fact that geographic relocation was an inherent part of the job, therefore, "employees who are willing to relocate may self select into these functional areas" (Brett, Stroh & Reilly

1993). According to their findings, “managers in sales and marketing, as predicted..., were most willing to relocate, those in engineering and computer systems, the least willing” (Brett, Stroh & Reilly 1993:55). Noe, Steffy and Barber (1988), however, found no support for the relationship between job specialization and willingness to relocate. According to their findings, employees who considered themselves to be generalists (possessing a range of skills applicable to several jobs) were just as willing to relocate as those who considered themselves to be specialists (having specific skills particular to a specified number of jobs).

#### ***Community Attachment Factor***

Community tenure was hypothesized to have a significant effect on employees' willingness to relocate. Researchers (e.g., Gould & Penley 1985; Markham, Macken, Bonjean & Corder 1983; Noe, Steffy & Barber; Swanson, Luloff & Warland 1979) supported claims regarding community tenure as an important variable. Their findings revealed that the longer the employees' time in a community, the less willing they were to relocate. In fact, Gould and Penley (1985) found that community tenure had the most significant effect on willingness to relocate amongst a sample of public-sector employees. In addition to time spent in a community, the level of satisfaction with and involvement in the community also affected employees' willingness to move. Research findings confirmed the fact that employees who were satisfied with and involved in their communities were less willing to relocate (e.g., Swanson, Luloff & Warland 1979; Veiga 1983). Given that relocation “disrupts social networks” and “changes access to leisure and civic activities, the more involved in or satisfied with these factors an employee is,

the more he/she is likely to resist relocation” (Noe & Barber 1992:162). Besides the effect of employees’ present community on willingness to move, Noe and Barber (1992) suggested that destination community also played a role in employees’ willingness to relocate. Their results indicated that employees were significantly more willing to relocate if the community to which they were moving were similar as opposed to substantially dissimilar to the one they currently resided in.

***Partner Attitudes Factor***

Attitudes toward moving, in particular - the partner’s attitude - was hypothesized to have a significant effect on employees’ willingness to relocate (Brett & Reilly 1988; Brett, Stroh & Reilly 1992,1993; Taylor & Lounsbury 1988). These authors predicted that moves in which the couple were opposed to the transfer would be evaluated less favorably than those in which the attitude was ambivalent, which in turn would be evaluated less favorably than those in which the attitude was positive, which would ultimately affect employees’ willingness to relocate. Their predictions were confirmed. For example, in their 1990 relocation study on American managers, Brett, Stroh and Reilly (1992:330) found that attitude played a significant role in one’s willingness to relocate. While personal attitude was important insofar as those who viewed moving in general in a positive light were more willing to relocate, spouse’s attitude “was the single most important factor predicting employee willingness to move among those who were married”.

Having said all this, what conclusions can be made about the type of employee most willing to relocate? Given the discrepant results, one would be hard-pressed to

arrive at any conclusion at all. Like the psychological, clinical, and social work literature, the management literature is inconclusive. Despite the mixed results regarding the psychological impact of relocation and the factors that predict willingness to relocate, job relocation has earned and maintained a reputation in the literature as being a negative life event whose participants for the most part tend to be young, career-driven men whose partners are unemployed.

#### The Sociological Comeback

Recently, a number of sociologists (e.g., Gray 1996; Hendershott 1995; Toliver 1993) have begun to re-examine issues surrounding corporate relocation. This resurgence of sociological interest in relocation was marked by the publication of Hendershott's (1995) book, *Moving For Work: The Sociology of Relocating in the 1990s*, in which she explored the impact of job relocation on employees' careers and personal relationships in an effort to understand the reasons people continue to move for work, explore their sentiments about the process, and offer their experiences to other potential movers. The author made note, in the preface of her book, that the impetus behind this work was the need to bring the sociological literature up to date *vis-à-vis* this prevalent social issue.

I felt that it was time for a reassessment. I had an idea that the 'organization man' and the 'corporate spouse' of the nineties were very different from their counterparts of the past because as a family therapist and social science researcher, I had talked with dozens of highly mobile families. I knew that most were not 'corporate casualties' of frequent relocations, and I had a good idea that there were many other families who were surviving work related moves. But, I also knew that today's families were

presenting a whole new set of challenges because families  
are simply not as transportable as they used to be.  
(Hendershott 1995:vi)

Social changes such as the increase in dual wage families and, more specifically, dual career families, as well as the rise in divorce, single-parent families, and family obligations (i.e., elderly parents care) have introduced a new handful of problems for workers in the 1990s. In light of these changes, Hendershott used national survey data describing the demographics of mobile employees to look into the manner in which individuals, families, and relationships continue to be shaped by contemporary demands in the workplace. Her study essentially explored how family members negotiate, manage, and compete amongst themselves in an effort to shape their marriages, children, extended families, and work demands into a complex, but tolerable, arrangement (Hendershott 1995:167). Although work demands were seen as encroaching on people's ability to choose where to live and there were huge costs associated with moving, it was suggested that relocation also contributed to higher income, occupational status, and sometimes improved opportunities for the partner as well. However, whether the move was good for some people or bad for others, Hendershott's (1995) study revealed that despite the social changes that have occurred over the years, the corporation has paid little heed to these changing family circumstances, preferring to treat these matters as private problems rather than as social issues. In other words, "today, as in the past, it remains the task of the employee and his or her family to accommodate the relocation demands of the corporate world" (Hendershott 1995:168).

Sociologists also took notice, in recent years, of the problems faced by ethnic and cultural minorities as a result of relocation. Given that whites are no longer the only ones relocating today, the issues confronted by people from different ethnic and cultural backgrounds have been explored by various researchers. Studies have demonstrated that the feelings of anomie suggested by past research to result from relocation were exacerbated when relocation involved the crossing of ethnic/cultural boundaries. In her study of Irish migrant women in London, Breda Gray (1996:28) found the experience of relocation to be a significant one "involving varying degrees of physical and emotional displacement and the ongoing work of negotiating gender and ethnic identities". The women in her sample were not only feeling displaced or anomic as a result of loss of community ties but their Irish identities were threatened by the loss of their "cultural back-up networks" (Gray 1996:24). Susan D. Toliver (1993), in her work on relocated black families, found similar results. Data from personal interviews conducted with 187 black managers and their families revealed that the high degree of social isolation brought on by the loss of community and physical distancing from kin support networks contributed to the problems experienced by black families who relocated. Given that "relocation frequently involves uprooting blacks from cultural supports and functionally supportive kinship networks", the loss of community becomes very problematic when it cannot be replaced in the new setting (Toliver 1993:114).

Assessing the Literature: Where Do We Go From Here?

Over the last twenty-five years, an extensive amount of research has been conducted on issues surrounding corporate relocation. In addition to the large volume of academic research, a proliferation of 'how-to' manuals for dealing with the logistics of the move and how to adjust to the new destination attests to the theoretical and practical relevance of this social issue. However, as the above review of this work revealed, the literature is plagued with inconsistencies. Methodological issues may be at the root of the problem.

Job relocation has essentially been conceptualized as a unidimensional, static phenomenon as opposed to a multidimensional, processual event. In other words, past research has usually focused on one dimension or one isolated aspect of the relocation process (i.e., the stressfulness of relocation) to the virtual exclusion of other dimensions that affect it and are, in turn, affected by it (i.e., the factors that induced the stress and the coping mechanisms employed to manage the stress). Related to this focus is the fact that studies have tended to look at relocation as an event occurring at one point in time (i.e., usually the arrival at the new destination) instead of looking at it as a sequence of events unfolding over a period of time. Yet, there is reason to believe that relocation is a successive and interdependent process, with earlier events influencing later events in the sequence. By focusing on one dimension or component of the process without considering those sequences of events that precede and proceed it, one is providing an incomplete picture of the phenomenon in question. Research on the psychological impact of relocation, for instance, has by and large concluded that relocation is a highly stressful

life-altering event. This conclusion was reached without addressing the causes of that stress, individuals' interpretations of their stress, and how they subsequently dealt with the stress. It may be that relocation was stressful in the beginning stages of the relocation process and, over time, individuals developed coping mechanisms to deal with their stress and eventually got over the anxiety produced by the move. Hence, without considering the process of relocation in its entirety from beginning to end, one runs the risk of presenting a distorted or incomplete picture of the impact of relocation.

Moreover, job relocation has been studied without paying much consideration to the context within which the move was offered and the decision to relocate was made. The decision to relocate is made not only on the basis of individual and career characteristics and attitudes as demonstrated in the management literature but in light of structural, familial, and social constraints as well. Agency cannot be separated from structure for the latter invariably impinges on the former. As unwilling as someone may be to relocate, if the socio-economic context within which they live is such that the chances of securing other employment in the area is slim, he/she may feel pressured to relocate. In addition, the 'timing' of the move is a critical element of context. If the timing of the move is not right for whatever reason, employees may likely not relocate regardless of whether they are willing to or not. It may be for this reason that the management literature had such mixed results. Therefore, the context in which the move takes place becomes a critical component of the relocation process.

Employees' perception of control over the move and perception of choice to relocate are two concepts which have also received little attention in the literature.

Individuals' perceptions of their situation are issues that specifically concern interpretive sociologists working from a symbolic interactionist, social psychological perspective and given that the majority of studies on corporate relocation have been more positivistic and quantitative (e.g., survey research) than interpretivist and qualitative (e.g., in-depth interview) in orientation, perceptual matters have not been addressed in past research. However, in the case of corporate relocation, where the employer usually initiates the move, employees' perceptions of control and choice become of critical importance. In other words, did employees perceive themselves as having control over the move? In spite of the fact that they may have actually had a choice to relocate, did they perceive themselves as having a choice to move or did they perceive their decision to move as being a 'constrained choice'? These questions are very important in understanding how employees experience the move and how they subsequently adapt to the relocated area.

In light of the methodological shortcomings of past research in this area, this study will address the relocation experiences of employees and their families by examining the underlying process of corporate relocation. This will be achieved by identifying the 'components' of relocation and the 'mechanisms' that link these components sequentially. The components and mechanisms of the relocation process will be identified by paying close attention to the influence of structural, individual, organizational, familial, and social constraints on people's decision to relocate; the manner in which the family as a unit negotiates the decision to move or stay; and the coping mechanisms they use to adjust to their new environments. Nigel Nicholson's (1987) notion of the 'transition cycle', proposed as an analytical building block for the

study of change and human resources management, will be used as a guide in the generation of a conceptual framework that will demonstrate how these components of the relocation process evolve over time. It is the aim of this study to develop a grounded theory of corporate relocation.

**CHAPTER 3****RELOCATION IN A CANADIAN CONTEXT**

Existing research in the area of corporate relocation reviewed in the preceding chapter has focused predominantly on the relocation experiences of American and British workers. Businesses in Canada, like their counterparts in the United States and the United Kingdom, have also had to respond to global pressures and technological advancements by implementing similar strategies to remain competitive. Consequently, job mobility as a management strategy is as widespread in Canada as any industrialized country (Martin 1996). However, to date, the corporate relocation experiences of Canadians and their families have received minimal scrutiny. This study will, therefore, examine the relocation *process* as experienced by Canadian workers.

**Job Relocation in a Canadian Context: Why Canada?**

Apart from the fact that little, if any, research has been conducted on relocated Canadians, Canadian society presents a unique setting in which to explore the social phenomenon of job relocation for two reasons. One, Canadian society is by its very nature unlike any other industrialized country in the world. The unique historical, political, and economic forces that have shaped Canada's Atlantic, Central, Prairie, and Western regions have produced disparities between them which, in turn, have created what authors (e.g., Hiller 2000; Matthews 1980, 1983; Simeon & Elkins 1980) have referred to as "regionalized cultures". These regionalized cultures are made up of people

whose identities are intrinsically tied to their region of residence, who have their own social customs and values, as well as their own political ideologies, and in some cases (e.g., Québec) have their own language and legal code. Although there is considerable debate on this issue, some researchers (e.g., House 1986; Matthews & Davis 1986) have thus claimed that regionalism in Canada is as important a social indicator of differences between people and as powerful a determinant of behavior as the more conventional sociological concepts of class and ethnicity. Given the regional differences that exist in Canadian society, one can argue that the relocation experiences of Canadians will vary depending on the region from which they are coming and the region to which they are going. By considering the effects of regionalism on the relocation experiences of Canadians, this study will introduce a dimension into the relocation process that has heretofore not been addressed by researchers.

A second reason why exploring the issue of corporate relocation within a Canadian context is intriguing has to do with the timing of this particular study. Since the late 1970s, Canadian society has been undergoing significant economic restructuring, shadowing the economic trend that arose three decades earlier in the United States. This American trend "euphemistically termed the rise of the sunbelt and the decline of the Northeast" (Watkins 1978:553), had the profound effect of internally redistributing the population in the United States from the northeast (i.e., New York, Chicago, Detroit) to the southwest (Florida, Atlanta, Arizona, California). Although Americans migrated west for, among other things, better climate, lower taxes, and political harmony, the strongest

pull factor that influenced their decision to migrate was the 'business-friendly' atmosphere that pervaded the southwestern region of the United States.

The internal redistribution of Canada's population during the latter decades of this past century occurred for similar reasons. Unlike previous streams of internal migration in the evolution of Canadian society (i.e., the migration of eastern Canadians who settled the West as part of a government initiative known as the National Policy of 1879 to populate the western part of the country, and the mass exodus of rural migrants to the closest urban centers after the second World War), this latest stream of internal migration was more inter-urban and often inter-regional in nature (George 1970; Rosenbaum 1993; Shaw 1985). In other words, over the last twenty-five years, Canadians, primarily for economic reasons, have migrated from one major urban or metropolitan center to another, the latter of which was usually located in a different region. This population shift which, like in the United States, went from east to west succeeded in not only exacerbating regional differences in this country but also transforming the shape and nature of Canadian society. Given that Canadian society has been experiencing this internal rearrangement of its population for over two decades, the Canadian context is ripe for inquiry into the relocation experiences of its workers.

#### The Westward Shift: The Contexts of Ontario and Québec

In the history of Canadian society, prior to the 1970s, the provinces of Ontario and Québec were the focal centers of economic development, with 75 percent of the major Canadian corporations and 85 percent of the leading financial institutions

establishing their head office functions in Toronto and Montréal respectively (Hiller 2000:131). These two cities overwhelmingly dominated the rest of the country not only in terms of population but also of economic development and employment opportunities. Consequently, significant socio-economic and cultural differences emerged between the cities of Toronto, Montréal and their supporting regions, and the rest of the nation (Hiller 2000:131).

During the late 1970s and early 1980s, however, central Canada's economic foothold began to waver (Nelles 1995). For the first time since the end of the second World War, Ontario and Québec experienced an industrial slowdown. Meanwhile the West, once considered a market hinterland to central Canadian industries, began to attract many people from other regions of the country as the price of energy sky-rocketed and the energy-producing provinces of Saskatchewan, Alberta, and British Columbia prospered (Richards and Pratt 1979). As a result, Canadian society began to experience during this period an economic power shift towards the West, particularly Vancouver, Edmonton, and Calgary.

Despite the economic development of Western Canada and the industrial setback in Central Canada, Ontario's economic growth was not stifled in the process. On the contrary, southern Ontario "consolidated its position as the center of economic power" in Canada (Hiller 2000:224). According to the 1997 figures published by Toronto's Financial Post 500, Toronto ranked number one in Canada as home to the greatest number of corporate headquarters (Kresl 2000:22). Moreover, the fact that the provincial region of Ontario and, more specifically, metropolitan Toronto, has been the primary

destination of immigrants to and inter-regional migrants within Canadian society as a whole for most of the last half of the twentieth century is an indication that Ontario was not severely affected by this population redistribution (Hou & Beaujot 1995; Newbold 1996).

Although Toronto and southern Ontario survived this power shift and emerged from it relatively unscathed, Montréal's economy took a turn for the worse. Once paired with Toronto as the hub of commercial activity for all of Canada, the economic growth towards the West in the late 1970s contributed to Québec's economic demise (Gagnon & Montcalm 1990; Lachapelle, Bernier, Salée, & Bernier 1993). According to economist Peter Karl Kresl (2000:8), "for Montréal, this [shift West] has brought a deterioration in status, of sorts, as Canada's national center of financial and corporate activity and decision-making, and the city has been forced to accept a redefinition of its role to that of a second-tier regional economic and financial center".

The increasingly high rates of unemployment in Québec attests to the economic downfall of Québec. Unlike Ontario, which boasts having one of the lowest average unemployment rates in the country, unemployment in Québec is an ongoing problem that has been on an "upward trend since 1960 and has remained at high levels since 1977" (Langlois, Baillargeon, Caldwell, Fréchet, Gauthier, & Simard 1992:135). Since the mid-1960s, the unemployment rate in Québec progressively increased from an average of 4.1% in 1966 to an all-time high of 13.9% in 1983 and then fell back to 9.3% in 1989 (Langlois et al. 1992:135). Despite the economic recovery following the early 1980s recession, the unemployment rate in Québec has remained at a high level.

Some argue that the economic demise of Québec is largely attributable to the political turmoil that has characterized the province for the past quarter century. Whether the deterioration of Québec's economy is due to the opening of the West or is simply a by-product of the rise of the nationalist movement in Québec is debatable. Authors like Gagnon and Montcalm (1990), for instance, avoid attributing Québec's economic decline to the rise of Québec nationalism by arguing that Québec's economic descent began prior to the Parti-Québécois' ascension to power in 1976. Similarly, Kresl (2000:1) has claimed that the position of Montréal and its regional economy is not due to politics but rather is the result of: 1) the process of globalization, and 2) specific policy initiatives. Although Kresl does not blame politics for Montréal's economic problems, he does acknowledge its implications. According to the author, "from the standpoint of economics, it must be said that this political uncertainty is a deterrent, to some degree, of investment in certain sectors and is one of the largest negative factors on Montréal's economic horizon" (Kresl 2000:21).

While it is unclear whether the on-going confrontation between Québec and the rest of English Canada is to blame for Québec's economic descent, what is clear is the demographic impact it has had on the province since the mid-1970s. The rise to power of the Parti-Québécois in 1976 on a platform endorsing Québec separation, the enactment of language laws such as Bill 22 and Bill 101, and the 1980 referendum on sovereignty-association where Québec residents were asked if the province should remain within Confederation, resulted in a significant out-migration of primarily English-speaking Québécois. According to Newbold (1996), the period between 1976 and 1981 was one in

which the English out-migration rate from Québec was 23 times that of the French, with approximately 20% of English-speaking Québécois leaving the province. This trend persisted well into the mid-1980s resulting in what Newbold (1996) referred to as a francophone “ghettoization” of Québec. Francophones residing in Québec were remaining within Québec and francophones outside Québec were migrating into Québec at a much higher rate than the non-French, while anglophone residents of Québec were leaving in droves. Consequently, this migration pattern created a situation wherein Québec became increasingly insular or disconnected from the rest of Canada (Newbold 1996).

Whereas some anglophones migrated voluntarily in search of better job opportunities and political stability, many Québécois relocated (usually to Toronto) because corporate headquarters (i.e., Texaco Canada, BP Canada) relocated from Montréal to Toronto. This trend continued well into the 1990s as major corporations like the Bank of Montréal and the Royal Bank relocated their senior executive offices and many functions from Montréal to Toronto and, in 1996, the quintessential national corporation - Canadian Pacific Railway - transferred its headquarters from Montréal to Calgary. Consequently, as the 1997 figures of the Financial Post 500 demonstrated, Montréal slipped to second place, behind Toronto, as a corporate headquarters location.

Moreover, it was during this period, the mid-to-late 1970s, that Toronto surpassed Montréal as Canada’s largest city (Anderson & Papageorgiou 1992). In addition to the declining birth rate in Québec and the significant out-migration of English-speaking residents, immigration has not been favourable to Québec. Although the province attracts

the overwhelming majority of French-speaking immigrants, many have no desire to settle in Québec where the language laws promote greater association of immigrants to the French language. Their preference to settle in Ontario and British Columbia, whose proportions of the immigrant population are significantly higher than the national average, has contributed to Québec's population decline.

More recent research on the situation of Québec reveals that the province remains at a disadvantage vis-à-vis internal migration, suffering from what demographers say is a 'brain-drain', with significant "losses of population through migration amongst the highly educated, the highly skilled, English speakers, and across all age groups" (Newbold 1996:4). This is hardly surprising given the political tensions that re-surfaced in Québec during the late 1980s and early 1990s with the defeat of both the Meech Lake Accord and the Charlottetown Agreement in 1990 and 1992 respectively, which then brought back to the political forefront the issue of Québec separation as manifested by the election of the separatist Bloc Québécois to the Federal Government in 1993 and the 1994 re-election of the Parti-Québécois in Québec. Since the near-victory of Québécois separatists in October 1995's referendum, when the schism between French and English Canada was greatest, political fervor in Québec appears to have subsided. However, the long-term effects of out-migration on Québec's position within Canada and its ability to compete in the international economy have weakened the economic leverage the province once shared with that of Ontario.

The New West: The "Alberta Advantage"

While the province of Québec received national attention for its exceedingly high rate of anglophone out-migration in the latter decades of the twentieth century, the province of Alberta (most notably, the city of Calgary) was singled out for its increasingly high number of in-migrants. New forms of economic growth and development in the energy sector - notably, the energy price increases between 1973 and 1985 and the imposition of the National Energy Program from 1980 to 1985 - instigated this inter-regional migration, the first wave of which lasted three years from 1979 to 1982. The result was the emergence of Calgary and Edmonton as major cities in the country, both attaining populations of over 600,000 by 1981 (Hirsch 1993:25).

Although Toronto and, to a lesser extent, Montréal, still had the advantage over any other city in Canada in terms of population size and economic development, the prospering cities of Alberta began to offer viable alternatives for headquarters of potential and existing corporations, especially within the oil and gas industry. Prior to the late-1970s and early-1980s, most corporations would establish their headquarters in either Toronto or Montréal because of their "superior services, labour force, legal and financial expertise, cultural amenities, and other locational advantages" (Hirsch 1993:25). With the increasing growth of Calgary and Edmonton, however, these cities were able to provide the needed services and amenities to a comparable degree. Moreover, it made more sense logistically and economically to set up or transfer energy corporation headquarters to Alberta and, more specifically, the city of Calgary<sup>1</sup>. As Hirsch (1993:74) explained:

The price hikes shifted corporate attention toward more profitable upstream activities (exploration, recovery, etc.) in Alberta, and away from

downstream activities in Toronto. During the 1970s, oil and gas companies invested heavily in land, as well as exploration and drilling capital. By the time the NEP was imposed in 1980, the investments in Alberta were already made. The difficult business environment created by the program necessitated the large energy companies to restructure, reorganize, and cut inefficiencies wherever possible. One way to increase communication with their exploration and drilling divisions, and improve overall corporate efficiency, was to move headquarters to Calgary.

The result was a substantial shift during this period in the location of oil and gas industry's corporate offices from Toronto to Calgary. As progressively more companies relocated to Calgary, and as the small and medium-sized energy companies in Calgary grew into large companies, the city became an oil sector magnet, drawing companies out of Toronto with increasing force. By 1981, the city of Calgary had carved its niche as the country's dominant center for the energy sector, surpassing Toronto in its percentage of assets of energy companies (Hirsch 1993:71). Since 1985, several other energy companies such as Norcen Energy, Gulf Canada, Shell Canada, TransCanada Pipelines, Suncor Energy, and the National Energy Board have moved to Calgary, thereby consolidating Calgary's hold on the energy sector.

In 1996, Calgary not only became home to Canadian Pacific Railway which, until then had been headquartered in Montréal, but Alberta also began to experience its second wave of in-migration. According to Statistics Canada figures, the province attracted more inter-provincial migrants in that year alone (around 70,300) than any other province in Canada. By April 1997, Calgary's population (790,498) had increased by almost 24,000 in a single year and was estimated to reach the one million mark by the year 2008. This population boom continued in 1997-1998 with reports confirming that the census metropolitan area of Calgary had a net migration inflow of 28 migrants per 1,000

residents - a rate far above that of any other CMA in the country (Statistics Canada, The Daily, Oct. 7, 1999). This more recent wave of internal migration has been attributed, in part, to Premier Ralph Klein's neo-conservative policies and their creation of a 'business-friendly' environment in Alberta. Calgary, more than any other city in the province, benefited from what became known as the "Alberta Advantage". This advantage came in the form of competitive business operating costs, lower tax rates, as well as payroll, inventory, machinery, and equipment tax exemptions. Moreover, since the city of Calgary is newer than the cities of central Canada, it could offer cleaner and cheaper space in which to do business, raise a family, and enjoy a better quality of life.

Hence, given the economic developments in Calgary in the latter decades of the twentieth century, the city has been expanding at a phenomenal rate largely due to inter-regional migration, earning the slogan "Calgary, Heart of the New West". While some migrated on their own initiative in pursuit of work opportunities or better living conditions or both, others have moved to Calgary through some form of sponsored migration (i.e., corporate relocation). The result has been a significant redistribution of the Canadian population from primarily the eastern region of the country to the west. This population shift has not only rendered the city of Calgary one of the most economically vibrant cities in the country, it has also transformed the shape and nature of Canadian society in the process.

Relocated Canadians: From Ontario and Québec to Alberta

In light of the economic restructuring of Canadian society and the significant shift westward since the late 1970s, this study will examine the relocation experiences of Canadian workers who moved from Ontario and Québec to Alberta (specifically, Calgary) for three reasons. One, although Canadians from various regions of the country have migrated to Calgary in the last twenty-five years, the majority of those who came to the city under the auspices of a corporate relocation have been predominantly from central Canada. Two, the fact that Québec was arguably the province that suffered the most economic consequences as a result of the population shift westwards, coupled with the distinct nature of Québec society, made Québécois workers an important consideration. Three, given that unlike Québec, Ontario was not particularly affected by the population shift but rather remains the dominant economic center of the country and is not as distinct as Québec, Ontarian workers would provide an appropriate comparison group to workers relocating to Calgary from Québec.

**CHAPTER 4****STUDYING THE RELOCATED**

The preceding three chapters contextualize my research agenda for this project by highlighting the importance of inquiring about the experience of corporate relocation as a major life event, addressing the findings of past research on the topic and identifying the lacunae in the literature, and providing reasons for conducting the study within Canada. The purpose of this chapter is to provide a detailed overview of the research design, to the extent that the methodology employed in this study allows it.

Before we can proceed to discussing research design, it is noteworthy to mention the rationale behind the methodological approach that was taken in this study. An important, albeit perhaps naïve, tenet of research methodology is that the research question precedes the research design and, more specifically, that the research problem or issue determines the appropriate method to investigating it (Goldenberg 1992). In practice, however, most researchers have a preferred methodology and their research question is usually tailored to favor the method of their choice. Having neither a penchant for qualitative nor quantitative research and recognizing the merits of both approaches to research, the present investigation was designed in consideration of the research question. As mentioned in the latter section of the introductory chapter, the research question of interest in this particular study is how Canadian employees and their families “experience” the corporate relocation process, and how they attach personal meaning to those experiences. While job relocation may mean something for one

employee and her family, it may have an entirely different meaning for another employee.

This research topic lends itself to qualitative in-depth interviewing with its focus on process and definition of the situation and, therefore, does not seem to be as amenable to quantitative methods.

Although qualitative research serves many purposes and can be exploratory, descriptive, or confirmatory in nature, the purpose of this particular research project is to explore or become familiar with the way in which Canadians experience job relocation. Unlike descriptive or confirmatory research where the goal of the former is to provide a detailed account of a situation and the aim of the latter is the testing of hypotheses, exploration is pursued when there is little or no scientific knowledge about the group or activity of interest but there is nonetheless reason to believe that it contains something worth discovering (Stebbins 1997:422). Although much research has been conducted on the psychological effects of job relocation and the identification of factors most likely to influence people to relocate, the relocation 'process' as such has received very little systematic scrutiny. In addition, while the bulk of research has focused on the relocation experiences of American and British employees, Canadians' experiences with relocation have received little attention. Moreover, times have changed and people who are relocating for work reasons today are doing so under very different circumstances and for very different reasons than say those who relocated thirty, twenty, and even ten years ago. Consequently, research findings of the 1970s and 1980s are, for the most part, no longer applicable to more modern relocated employees and their families. This lack of research

on the relocation process coupled with the many socio-cultural changes that have taken place in society justify exploration in this area.

#### Conceptualization: Re-Defining Relocation as “Process”

Although job relocation is defined as a simultaneous job and geographical move, there are different types of relocation. The most common type is a ‘job transfer’ wherein an individual employee changes jobs within the company and physically moves to do so. Job transfers are often, but not always, synonymous with career advancement so that a promotion or the likelihood of obtaining a promotion often entails moving to another city, state, or province. While job transfers are primarily domestic, ‘international transfers’ are moves which involve the crossing of international borders. A third type of relocation is what is referred to as a ‘group move’. This type of relocation occurs most often when corporations relocate their headquarters and, as a result, their personnel.

In addition to these three forms of relocation, each type can be further differentiated in terms of voluntary or involuntary moves. Job transfers - be they domestic or international - are predominantly, but not exclusively, voluntary in that employees themselves initiate the move or ask for the transfer. By contrast, group moves often involve employees who would not ordinarily expect, let alone volunteer, to relocate for work. These types of moves are usually initiated by the employer, leaving employees with the difficult dilemma of deciding between moving with the company and retaining their jobs, or refusing to move and potentially losing their jobs. The type of relocation

and the voluntary or involuntary nature of the move makes for very different reactions to and experiences with the relocation process.

Therefore, because only those employees who moved under the auspices of a 'group move' as a result of the relocation of a company headquarters were considered for this study, corporate relocation was defined as any work-related move that was initiated not by individual employees, but by their employers. Those who volunteered or asked to be transferred were not included. By focusing exclusively on those individuals who did not initiate their relocation, careful consideration could be given to the manner in which individuals react to, deal with, and finally come to terms with an unexpected life change.

Although this conceptual definition of corporate relocation may appear to be rather simplistic, it becomes quite clear that the social phenomenon of job relocation is far from simple. As ordinary as they may be, geographical migrations, commonplace as never before in human history, always demand of the persons involved the ability to change, adjust, and cope. Like other major life events (e.g., marriage, divorce, or bereavement), job relocation requires the leaving behind of something old and familiar and the adoption of something new and a transition from one state of being or set of circumstances to another.

As the review of the literature revealed, past research on the topic of corporate relocation tended to treat relocation primarily as a static phenomenon, occurring at one given point in time, usually when the marker event took place (i.e., the actual physical move). In reality, however, the job relocation experience begins much earlier and ends much later than the day of the move. In order to capture the essence of this life-changing

event, Nigel Nicholson's (1987) formulation of the 'transition cycle' provides a guiding principle for conceptualizing job relocation as a transitional process wherein one stage of the process influences subsequent stages. Nicholson's cycle, which consists of four stages or phases (preparation, encounter, adjustment, stabilization), is necessarily recursive, disjunctive, and interdependent. In other words, each stage influences and, in turn, is influenced by subsequent stages in the cycle (recursive); each stage in the cycle is characterized by distinctive experiences and events as a result of different psychological processes that mark each phase of the cycle (disjunctive); and what happens at one stage invariably affects what happens at the next (interdependent). By conceptualizing relocation as a process rather than a static phenomenon, we will gain a more accurate and comprehensive understanding of how this major life event is experienced.

#### Sample

Sampling decisions are analogous to conceptualization decisions in that "specification of the sampling frame translates a rather abstract idea of the purpose and orientation of the research into a far more grounded or concretely spelled out set of rules concerning how data will be gathered and what basis there will be for generalization from them to the relevant population" (Goldenberg 1992:152). Although the population of interest for this particular study consists of relocated employees in Calgary from Québec and Ontario, these individuals do not compose an immediately accessible population. Given the fact that no exhaustive listing of the population exists or can be created from which a simple random or any other probability sample could be drawn, a non-probability

sample was used for this study. A sample of relocated employees in Calgary who came from Québec and Ontario was obtained through a combination of purposive and snowball sampling techniques. To be included in the study, employees had to meet two criteria: (1) they had to have relocated upon the request of their employer and, (2) they had to have been born or raised in Québec or Ontario.

As a first step, I addressed an introductory letter disclosing the purpose of my research to the human resource department of various companies in Calgary that I knew, or had been told, had relocated employees from Québec and Ontario. I then followed up these letters by phoning or meeting with those individuals who were in a position to assist me in my research demands. While some put me in direct communication with employees who met my criteria by providing me with their names, office phone numbers, and e-mail addresses, others requested hard or disc copies of my introductory letter which they then took upon themselves to mail to the appropriate employees. A total of 43 employees were recruited in this fashion. Another 20 employees were referred to me by these initial participants and recruited on that basis.

The sample for this study, therefore, consists of a total of 63 relocated individuals, 33 or 52.4% of which are from Québec, and 30 (47.6%) from Ontario. Although an attempt was made to render the sample as demographically heterogeneous as possible by sampling men and women, young and older employees, those with greater company tenure and those with less, singles and married people, employees with children and those without, the figures shown in Table 1 reveal that the sample is in fact more homogeneous than heterogeneous. This comes as no surprise in light of the many research findings that

indicate that certain 'types' of people are more willing to relocate than others. Moreover, if we compare the Québec and Ontario samples in terms of their various characteristics, we see that although the percentages may vary, the relocated employees from Québec show similar demographic trends to those from Ontario. The purpose of having both groups represented in the sample is to compare their relocation experiences, therefore, the fact that the Québec and Ontario samples displayed similar characteristics from the outset renders their comparison all the more valid.

The sample characteristics listed in Table 1 were compiled with the aid of one of two sources: (1) my personal notes and interview data (i.e., gender, relocation status, civil status, family status); and (2) returned questionnaires (i.e., age, education, income, occupation, company tenure). Information about the first group of variables was made known to me during the sampling and data collection phases, therefore, the figures in relation to those variables are calculated on the basis of the total sample size (N=63). Information about the second group of variables, however, was obtained through a short questionnaire I gave employees upon completion of the interview (for the purpose of gathering various demographic information) with instructions to return the survey to me. A total of 53 questionnaires (32 from the Québec group and 21 from the Ontario group) were completed and returned for an overall response rate of 84.2% and, for this reason, the figures related to those variables are calculated on the basis of the number of obtained responses.

***Gender, Age, Civil and Family Status***

The overwhelming majority (74.6%) of the relocated employees in the sample were male, and the split between the Québec and Ontario samples was relatively even with 75.8% and 73.3% of the Québec and Ontario samples, respectively, being male. The fact that male employees outnumbered their female counterparts is consistent with the literature which says that males tend to relocate for work reasons more than female employees. In terms of age, the mean age for the entire sample was 41.13 years with the youngest employee being 24 years of age and the eldest being 56. Although the Québec sample reported a higher mean age of 42.5 years in comparison to Ontario's 39.75 years, the difference is not substantial. As far as civil and family status are concerned, although 15.9% of all employees were single and 25.4% had no children at the time of relocation, 77.8% of them were married and 74.6% had children. While the Québec and Ontario groups displayed the same trends, the former had a greater proportion (87.9% versus 66.7%) of employees who were married at the time of relocation as well as a higher percentage (81.8% versus 66.7%) of employees with children.

***Education, Income, Occupation***

The socio-economic status of the relocated employees in this sample is exceptionally high, which again is not at odds with what is reported in the literature. If we look at the education, income, and occupation variables, we notice that over half (66.1%) of the entire sample has a university education. However, although the majority of Québécois and Ontarian employees are university-educated, 81% of the employees from Ontario have a university degree compared to 56.2% of the workers from Québec. In

terms of income (which was measured as total family income), the two groups show a somewhat similar trend. The modal income category for the entire sample as well as the Québec and Ontario groups is \$50,000-\$99,999, where 45.3% of the entire sample fit, with a second group (35.8%) falling into the \$100,000-\$149,999 income category. In other words, over 80% of the entire sample reported an overall family income in excess of \$50,000. Although a variety of professional and occupational positions are represented in the sample, the largest proportion of relocated employees (37.5%) occupied a managerial position. This is true for the Québec group (37.8%) as well as the Ontario group (36.8%).

#### ***Company Tenure and Relocation Status***

While some employees had been with the company for one year and others as many as 35 years when they relocated to Calgary, on average the company tenure of relocated individuals in this sample was a little over 16 years. The Québec group reported a higher company tenure (18.65 years) than the Ontario group (14.25 years), however, the difference is not considerable. With regards to relocation status, given that the employees in this study relocated under the auspices of a group move, the move was for the overwhelming majority of them (69.8%) a lateral one (same/similar position, same salary). A significantly smaller percentage (28.6%) of employees relocated with a promotion and only one employee in the sample relocated with a demotion. The pattern is consistent in both the Québec and Ontario samples even though more employees from Ontario (83.3%) than Québec (57.6%) underwent a lateral move and more Québécois (39.4%) than Ontarians (16.7%) moved with a promotion.

Table 1: Summary Table of Sample Characteristics

	QUÉBEC	ONTARIO	ENTIRE SAMPLE
<b>Gender *</b>			
Male	25 (75.8%)	22 (73.3%)	47 (74.6%)
Female	8 (24.2%)	8 (26.7%)	16 (25.4%)
<b>Mean Age (in years) †</b>	42.5	39.75	41.13
<b>Education †</b>			
High School	8 (25.0%)	3 (14.3%)	11 (20.7%)
College/Cégep	6 (18.8%)	1 (4.7%)	7 (13.2%)
University	18 (56.2%)	17 (81.0%)	35 (66.1%)
<b>Income †</b>			
Less than \$50,000	2 (6.3%)	3 (14.3%)	5 (9.4%)
50,000-99,999	15 (46.8%)	9 (42.8%)	24 (45.3%)
100,000-149,999	13 (40.6%)	6 (28.6%)	19 (35.8%)
150,000 +	2 (6.3%)	3 (14.3%)	5 (9.5%)
<b>Occupation †</b>			
Accountant	1 (3.5%)	2 (10.5%)	3 (6.3%)
Architect	1 (3.5%)	0	1 (2.1%)
Clerk	1 (3.5%)	1 (5.3%)	2 (4.2%)
Consultant	2 (6.9%)	1 (5.3%)	3 (6.3%)
Director	4 (13.7%)	0	4 (8.3%)
Engineer	1 (3.5%)	3 (15.7%)	4 (8.3%)
Human Resources	1 (3.5%)	1 (5.3%)	2 (4.2%)
Information Tech	2 (6.9%)	2 (10.5%)	4 (8.3%)
Manager	11 (37.8%)	7 (36.8%)	18 (37.5%)
Problem Analyst	0	1 (5.3%)	1 (2.1%)
Representative	4 (13.7%)	1 (5.3%)	5 (10.4%)
Specialist (parts)	1 (3.5%)	0	1 (2.1%)
<b>Mean Company Tenure (in years) †</b>	18.65	14.25	16.45
<b>Relocation Status *</b>			
Promotion	13 (39.4%)	5 (16.7%)	18 (28.6%)
Lateral	19 (57.6%)	25 (83.3%)	44 (69.8%)
Demotion	1 (3.0%)	0	1 (1.6%)
<b>Civil Status*</b>			
Single	3 (9.1%)	7 (23.3%)	10 (15.9%)
Married	29 (87.9%)	20 (66.7%)	49 (77.8%)
Divorced	1 (3.0%)	2 (6.7%)	3 (4.8%)
Widowed	0	1 (3.3%)	1 (1.5%)
<b>Family Status*</b>			
Children	27 (81.8%)	20 (66.7%)	47 (74.6%)
No Children	6 (18.2%)	10 (33.3%)	16 (25.4%)

\* Figures calculated out of a total N=63 (Québec), N=30 (Ontario), N=63 (Entire Sample)

† Figures calculated out of a total N=32 (Québec), N=21 (Ontario), N=53 (Entire Sample) except for "Occupation" variable which is calculated out of a total N=29 (Québec), N=19 (Ontario), N=48 (Entire Sample)

*The Québec Sub-Sample*

In addition to sampling employees who relocated from Québec and Ontario, an effort was made to include within each sub-sample individuals whose mother tongue was English and French. This proved to be rather difficult in the case of Ontario as evidenced by the fact that of the 30 people who relocated from Ontario, all but three individuals were anglophone. By contrast, the Québec sample was more evenly divided, with 15 people or 45.5% of the sample consisting of French-speaking Québécois<sup>2</sup> and 18 or 54.5% comprising of English-speaking Québécois. Given the very small number of francophones in the Ontario sample and the more balanced number of francophones and anglophones in the Québec sample, only a summary table of the latter was included. According to the summary table of the Québec sample (Table 2), French-speaking Québécois were, on the whole, relatively similar in terms of characteristics to their English-speaking counterparts, with some minor exceptions. Essentially, the two linguistic groups were alike as far as gender was concerned with 80.0% of the francophones and 72.2% of the anglophones being male. However, their mean age differed somewhat, with francophone employees being on average 5.71 years older than anglophone workers. As far as civil and family status are concerned, French and English-speaking Québécois were basically the same. While 86.6% of the francophones in the Québec sample were married, 88.9% of the anglophones were married, and 86.7% and 77.8% of the francophones and anglophones, respectively, had children.

In terms of socio-economic status, French and English-speaking Québécois were largely comparable, however, there were some minor differences. Although the

Table 2: Summary Table of Québec Sub-Sample

QUEBEC			
	French	English	Entire Sample
<b>Gender *</b>			
Male	12 (80.0%)	13 (72.2%)	25 (75.8%)
Female	3 (20.0%)	5 (27.8%)	8 (24.2%)
<b>Mean Age (in years) †</b>	45.71	40.0	42.5
<b>Education †</b>			
High School	5 (35.7%)	3 (16.7%)	8 (25.0%)
College/Cégep	0	6 (33.3%)	6 (18.8%)
University	9 (64.3%)	9 (50.0%)	18 (56.2%)
<b>Income †</b>			
Less than \$50,000	1 (7.1%)	1 (5.6%)	2 (6.2%)
50,000-99,999	5 (35.8%)	10 (55.5%)	15 (46.9%)
100,000-149,999	7 (50.0%)	6 (33.3%)	13 (40.7%)
150,000 +	1 (7.1%)	1 (5.6%)	2 (6.2%)
<b>Occupation †</b>			
Accountant	1 (7.1%)	0	1 (3.4%)
Architect	1 (7.1%)	0	1 (3.4%)
Clerk	0	1 (6.7%)	1 (3.4%)
Consultant	2 (14.3%)	0	2 (7.0%)
Director	2 (14.3%)	2 (13.3%)	4 (13.8%)
Engineer	0	1 (6.7%)	1 (3.4%)
Human Resources	1 (7.1%)	0	1 (3.4%)
Information Tech	0	2 (13.3%)	2 (7.0%)
Manager	4 (28.7%)	7 (46.7%)	11 (37.9%)
Representative	2 (14.3%)	2 (13.3%)	4 (13.8%)
Specialist (parts)	1 (7.1%)	0	1 (3.4%)
<b>Mean Company Tenure (in years) †</b>	19.5	17.8	18.65
<b>Relocation Status *</b>			
Promotion	7 (46.7%)	6 (33.3%)	13 (39.4%)
Lateral	7 (46.7%)	12 (66.7%)	19 (57.6%)
Demotion	1 (6.6%)	0	1 (3.0%)
<b>Civil Status *</b>			
Single	1 (6.7%)	2 (11.1%)	3 (9.1%)
Married	13 (86.6%)	16 (88.9%)	29 (87.9%)
Divorced	1 (6.7%)	0	1 (3.0%)
Widowed	0	0	0
<b>Family Status *</b>			
Children	13 (86.7%)	14 (77.8%)	27 (81.8%)
No Children	2 (13.3%)	4 (22.2%)	6 (18.2%)

\* Figures calculated out of a total N=33

† Figures calculated out of a total N=32 (except for "Occupation" variable which is calculated out of a total N=29)

percentage of francophone and anglophone relocated employees with a university education (64.3% and 50.0%, respectively) outnumbered those employees with a college education or less, 33.3% of the sample with a college or cégep degree consisted entirely of anglophones. Hence, the anglophone portion of the sample was slightly better educated than the francophone portion. As far as income is concerned, more anglophones (55.5% versus 35.8%) than francophones earned between \$50,000 and \$99,999, however, the percentage of those who made between \$100,000 and \$149,999 was higher for francophones than anglophones (50.0% versus 33.3%, respectively). Occupation was also similar with management being the modal occupation category for both linguistic groups.

Lastly, both French and English-speaking Québécois employees were relatively similar in terms of company tenure, with the former surpassing the latter by approximately 1.7 years. Having said all this, it remains that despite certain discrepancies in percentages, the French and English-speaking employees of the Québec sub-sample, much like the Québec and Ontario samples, show relatively similar demographic patterns thereby allowing comparisons to be made.

#### Companies Involved

Human resource personnel as well as all participants in this study were assured from the onset that the name of their employer would be held in the strictest of confidence, therefore, I am unable to disclose the names of the companies involved in this study. Suffice it to say, however, that a total of seven non-governmental companies were represented in this study, all of which have been in operation in Canada since the early

20<sup>th</sup> century (some even as early as the 19<sup>th</sup> century), serving major industries from the resource-based industries of the West to the manufacturing bases and consumer markets in Central Canada and the northern United States. The companies in question are among the leading producers of transportation, energy, natural gas, natural gas liquids and bitumen, crude oil, sulphur, coal, grain, and potash in Canada and among the world leaders in mining, extracting, and exploring for, developing, manufacturing, distributing, and marketing conventional crude oil, natural gas, and refined petroleum products. The companies employ over 2,000 workers and have derived, over the last decade, annual revenues in excess of two billion dollars. Moreover, the common thread that passes through each of these companies is that, over the last fifteen years, they have undergone significant internal reorganizations and have relocated their headquarters and employees from Toronto and Montréal to Calgary.

#### Data Collection

An interpretive approach to research and theory was taken in this study wherein an attempt was made to enter the world of relocated employees in the hopes of gaining and developing a greater understanding of their experiences with corporate relocation. This interpretive approach can be traced back to Max Weber and his emphasis on acquiring an intimate, first-hand understanding (*verstehen*) of the social phenomenon being observed. An important premise of this interpretive approach to research is that reality is socially constructed through interaction and negotiation, and the subject's 'definition of the situation' is a critical ingredient in explaining his or her behavior. In

other words, this approach advocates that in order to meaningfully understand or explain social action, the subject's interpretation of his or her reality - hence, the name interpretive sociology - must be assessed.

#### *In-Depth, Semi-Structured, Face-to-Face Interviews*

Two efficacious methods of collecting data from this micro-interpretive perspective are participant observation and in-depth interviews. While participant observation was an integral component of the research process, the data for this study was gathered primarily through in-depth, semi-structured, face-to-face interviews. A list of the questions used to guide the interviews is available in Appendix I.

In an attempt to capture the entire process of relocation from beginning to end, the interview was divided into three parts. In the first part of the interview, I asked questions pertaining to that period before the actual physical move (from the time the employee was asked to relocate to the day of the move). I then proceeded to the second phase of the interview which consisted of questions about the actual relocation (from the time the employee left Québec or Ontario to the time he or she arrived in Calgary), and finally, the last phase of the interview addressed questions of adjustment and adaptation to the new environment (the time after the move). The format of the interview was well received by the subjects for they indicated that conducting the interview in this sequential manner facilitated recall and allowed them to actually relive the experience in their minds.

#### *Role of the Researcher*

Although it is important that the interview be as open-ended and flexible as possible to adequately explore the social phenomenon in question, the role assumed by

the researcher is equally as important when conducting in-depth, semi-structured interviews. Unlike researchers who are more concerned with verification and assume the role of researcher-as-expert, exploratory researchers are more likely to adopt the position of researcher-as-instrument. The premise of this role is that the respondents are the experts from whom the researcher will hopefully learn about their social world. Such a position supposes that the interpretive researcher does not possess expert information on the subject in question. On the contrary, the researcher expects to be “socialized” or taught in the way of life being studied (Goldenberg 1992:198). This role is particularly conducive to exploring a certain group or activity and for this reason is preferred by interpretive researchers.

To fulfill this role as best I could, it was imperative for me to minimize any preconceptions I might have had about relocation and approach this topic with an open mind. As is the case with many researchers, my choice of research topic was largely biographical. Like those I interviewed, I had relocated from Québec to Calgary. Although I did not relocate under the auspices of a corporate relocation or for reasons having to do with work, I did in fact experience a major life change as a result of the move. However, I wanted to ensure that I was not prejudicing my study in any way by tailoring it according to my own relocation experiences. Therefore, I spoke to several people in the relocation industry (i.e., human resource personnel, real estate agents, relocation consultants) on a very informal basis with the aim of familiarizing myself with the context surrounding corporate moves. This helped me maintain a certain analytical distance while providing

me with the ability to draw upon my own experiences with relocation to interpret what I observed.

My personal experience with relocation was also instrumental in building rapport and trust with my participants. Many expressed to me the fact that they felt more comfortable speaking to me about their experiences because I knew “where they were coming from”. After several failed attempts to speak to people who had never relocated about their feelings, concerns, and experiences with the move, they felt a sense of relief talking to me about their experiences. The employees from Québec especially appreciated my situation, and the fact that I came from Québec and was able to speak to them in their own language made them all the more comfortable. I also detected a sense of relief on the part of many Québécois, French and English alike, who felt like they were finally able to speak to someone about their experience without necessarily having to choose their words carefully. As one woman said to me, “finally I can talk to someone without being so concerned about political correctness...I don’t mean to insult anyone but there are things I just wouldn’t say to someone who was from here”. Overall, their perception of me as an “empathetic listener”, combined with my more personal versus formal style of interviewing, were contributing factors to successful rapport-building, which inevitably facilitated the interview process.

#### ***Cross-Sectional Design***

The interviews were conducted over a period of five months, from February to July 1999. Although a longitudinal research design would have possibly been more effective in capturing the relocation process in its purest form, allowing one to examine

how it unfolds over time and how individuals 'experience' this major life-altering event, a study of that magnitude would have taken more time than was originally available for this study. However, notwithstanding the potential recall biases that are invariably associated with cross-sectional, retrospective data and the problems that arise as a result when interpreting the data, for the purposes of this research, the in-depth, semi-structured interview was deemed the next best alternative. As various researchers (e.g., Freedman, Thornton, Comburn, Alwin & Young-DeMarco 1988; Metts, Sprecher & Cupach 1991) pointed out, respondent recall bias is more problematic in instances where respondents are asked to recount experiences from their past that are not very salient. For the participants in this study, job relocation was an extremely important event in their lives and, judging from the voluminous amount of detail they provided, they had minimal difficulty recalling the incidents and emotions surrounding their experience. This is in keeping with Freedman et al.'s (1988) argument that details surrounding major life events are more readily remembered.

#### *Location and Duration of Interviews*

The interviews took place at the participant's home or place of work depending on his or her preference. The participants were also given the choice of being interviewed alone or with their partner/family, and the interview was conducted in the language (either English or French) of their choice. The majority of the Québec sample (20 out of 33 individuals) preferred to be interviewed at home with their partners. Ten of those individuals were francophone and the other ten were anglophone. The remaining 5 francophones and 8 anglophones chose to have the interview at their place of work. All of

the interviews with the French-speaking Québécois were conducted in French since that was the language they felt most comfortable expressing themselves in, and the anglophone Québécois preferred to be interviewed in English. By contrast, the overwhelming majority of the Ontario sample (23 out of 30 employees) chose to be interviewed at work<sup>5</sup>. Of those who preferred to be interviewed at home with their partner, three were francophone (the entire French-speaking group) and 4 were anglophone. The interviews were all conducted in English with the exception of one French-speaking couple who opted to have the interview in French.

The interviews ranged from one to two and a half hours in length. It was not surprising that the interviews that were conducted at home in the presence of the employee's partner were longer and more detailed than the ones conducted at work. This may have been due, in part, to the fact that the employee was in a much more relaxed environment without the added pressure of completing the interview within a reasonable period while on company time. In this more informal setting, the interviewee was willing to elaborate on socio-political, cultural, and company-related issues and speak about their personal experiences with the move in greater detail. Moreover, the fact that the partner was participating in the interview and sharing his or her point of view on the matter at hand necessarily made the interview longer in length and denser in scope. Hence, given that the majority of the Québec sample chose to be interviewed at home, the data from those interviews are much more detailed than that from the Ontario interviews. I attempted to compensate for this lack of detail in the Ontario sample by asking employees what they thought their partners had felt and experienced during the relocation

process. Although the information provided was secondhand, it was better than no information at all. For the most part, the participants were quite confident in providing responses to questions about their partners' feelings and experiences which they would usually preface by saying something like, "oh, yeah, we discussed that and she told me....", or "we talked about that a lot and he made it very clear to me that....". Although such data will be considered in the overall analysis, more weight will be placed on firsthand information.

#### Research Design Weaknesses

As with any research design, the sampling and data collection procedures were far from perfect given the concessions I had to make in order to carry out this research. As mentioned earlier, the sampling restrictions I faced as a result of the unavailability of a specific sampling frame from which I could randomly select relocated employees and the company policies forbidding the disclosure of any information about their employees, made it such that my sample was largely made up of employees who put their names forward to be interviewed. This self-selection invariably introduced an element of bias in my sample. Moreover, given my desire as a researcher to accommodate my participants as much as possible to ensure and maximize excellent rapport, it was imperative that they be given choices as to the location of the interview and whether to be interviewed alone or with their partners. Thus, another inherent weakness of my research design is that a greater number of employees from Québec than Ontario chose to be interviewed with their partners at their home instead of alone at their place of work.

Hence, given the self-selective nature of the sample and the skewed or disproportionate number of Québécois employees who opted to be interviewed with their partners, the sample is not entirely unbiased. Add to this the fact that the majority of the employees in this study were middle-aged, university-educated, married men with children, occupying managerial positions, earning more than \$50,000 a year, I can hardly say that my sample of 63 relocated employees from Québec and Ontario and their experiences are representative of Canadians' experiences with relocation. However, that is not the purpose of my research. My aim is to generate ideas about job relocation in Canada, develop a clearer understanding of the manner in which this major life event is experienced, and gain some insight into the meanings people attach to their experiences.

This is not to say, however, that qualitative research findings can never be generalizable. They can be, according to sociologists and methodologists like Stebbins (1992), provided that researchers follow up the initial project, "concatenating" subsequent projects into a grounded theory of ever greater breadth. Concatenation, which "refers at once to a research process and the resulting set of field studies that are linked together, as it were in a chain leading to cumulative grounded, or inductively generated, theory", solves the problem of ungeneralizability of qualitative research findings for "each study or link in the chain examines or, at times, re-examines a related group or social process or aspect of a broader category of groups or social processes" (Stebbins 1992:435). It is my hope that this study be the first link in a long chain of studies on relocation in order to arrive at a conceptually adequate grounded theory of relocation in Canada. Although this study is representative of the relocation experience in Calgary, by virtue of being the first

link in the chain, it is not in any way representative of the relocation experience in all of Canada.

#### Data Analysis

The mode of qualitative analysis used for this study is based on the inductive generation of new concepts and propositions for the purpose of building theory. This grounded theory approach, as espoused by Glaser and Strauss (1967), is a “qualitative research method that uses a systematic set of procedures to develop an inductively derived grounded theory about a phenomenon”, the purpose of which is to build theory that is true to and highlights the area under investigation (Strauss & Corbin 1990:24). Glaser and Strauss (1967) proposed the method of comparative analysis through systematic choice and study of comparison groups as a useful way of generating this theory. The comparative analysis method involves coding data after they are collected, identifying categories, comparing incidents applicable to each category, introducing new categories suggested by the comparison until new comparisons no longer reveal new information (Glaser & Strauss 1967:105-108).

#### Evaluative Criteria

While conventional criteria for evaluating research such as internal and external validity, reliability, and generalizability are appropriate for quantitative studies, qualitative researchers have argued that those criteria as such are unsuitable for assessing the soundness of qualitative research (Corbin & Strauss 1990; Erlandson, Harris, Skipper

& Allen 1993; LeCompte & Goetz 1982; Lincoln & Guba 1985). Grounded theorists, in particular, believe that the usual canons of “good science” should be retained, however, they should be ‘redefined’ to accommodate the realities of qualitative research and the complexities of social phenomenon (Corbin & Strauss 1990:4). A grounded theory can be evaluated in terms of its validity or credibility by assessing the extent to which the findings are empirically grounded. According to the criteria suggested by Corbin and Strauss (1990:17-19), a grounded theory is valid if: (1) the concepts are generated from the data; (2) the concepts are systematically related; (3) the categories are well-developed, conceptually dense, and tightly related; (4) variation is built into the theory; (5) broader conditions that affect the phenomenon in question are built into its explanation; (6) process has been taken into account; and (7) the theoretical findings appear to be significant.

A grounded theory is typically considered to be reliable, or reproducible, to the extent that the new situation and conditions under investigation are an exact replication of earlier studies. Although major conditions may be replicated, it is almost impossible in the social realm to recreate all of the original conditions. As a result, reliability is much less of a concern for qualitative researchers in general, and grounded theorists in particular, than the more positivistically inclined researcher. However, as Corbin and Strauss (1990:15) suggested, “the more abstract the concepts, and the more variation uncovered in the original study, the more likely it is that the propositions apply to a broad range of situations”. In other words, reliability can be achieved to a certain extent by elevating the level of abstraction of the generated concepts and propositions so that they

are not only applicable under the original set of conditions but can be applied under a variety of conditions.

In terms of generalizability or transferability, a grounded theory can be said to be generalizable insofar as it “specifies conditions that are linked through action/interaction with definite consequences”, (Corbin & Strauss 1990:15). However, as was mentioned earlier, definitiveness can only be established and, hence, generalizability can only be achieved, through concatenation. By concatenating subsequent studies into a grounded theory of greater applicability, the generalizability problem that plagues qualitative research in general and exploratory research in particular will be addressed.

#### Ethical Considerations

Upon establishing contact with the participants in this study and explaining to them the purpose of my research, they were assured complete confidentiality in the event that they should wish to participate. It was made very clear to them that their name and that of their employer would be held in the strictest of confidence and that pseudonyms would replace all given names. Before every interview, participants were provided yet again with a brief account of the intent of the study, were asked to read and sign a consent form (see Appendix II), and were advised that their participation in the study was strictly voluntary and that they may cease further involvement at any time without prejudice. They were further advised that they could refrain from answering any question with which they felt uncomfortable, as well as request to view their transcribed interview or

final draft of the research project. Only one person requested to see her transcribed interview.

The interviews were tape-recorded and subsequently transcribed with the accord and permission of every participant<sup>4</sup>. They were informed of my intentions to hire transcribers to assist me in transcribing the interviews and, although I offered to personally transcribe the interviews for those who were opposed to my using a transcriber, not one person objected to the use of transcribers. I assured them that no one other than myself would have access to the tapes, the transcribed interviews, and any personal notes taken during the course of the research, all of which were going to be stored and locked in a filing cabinet in my residence and destroyed by September 2002. However, participants were made aware of the fact that the data were going to be discussed with my supervisor and that the final analysis, or at least parts of it, was in all likelihood going to be submitted for publication.

In addition, I would like to mention that there was absolutely no deception or withholding of information of any kind to participants involved at any stage of the research process. I always gave full disclosure of my intentions as a researcher and did not use any psychological, physiological, or other potentially risky manipulation. Although a few participants became emotional during their interviews, they refused to put an end to the interview. In every instance, the subject's feelings of personal comfort was respected and protected in the aim of rendering their experience in this research process a positive one. At the end of the interview, the majority of participants expressed their satisfaction with the interview. For some, the interview process was cathartic in that it

provided an opportunity to talk openly about their experiences and address certain questions about the relocation that they otherwise would not have considered. As a result, the interview turned out to be just as informative for the participants as it was for me.

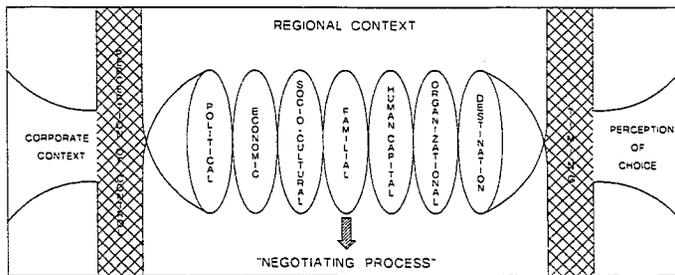
**CHAPTER 5****CONTEMPLATING MAKING THE MOVE:****DEFINING THE SITUATION**

Corporate relocation is necessarily a disruptive event, irrespective of the reasons and motivations behind the move. That is because job relocation involves a multitude of changes and change is anathema to most people. In his various analyses of change, Nigel Nicholson (1987:167-168) highlighted the fact that the study of change is a challenging endeavor for "...change is often treated as a 'problem' for people and organizations, intervening to disturb the stable states of normal life before new equilibria can be established". As problematic as change may be, social scientists are aware of the fact that change is the norm and stable equilibrium the exception. Therefore transitions of any kind - whether they be the transition from childhood to young adulthood, or the transition from marriage to divorce, or even the transition from a state of health to one of chronic illness - are an inevitable part of life. In the case of job relocation, at worst, it is a bothersome intrusion upon the lives of employees, their families, and the day-to-day operations of the corporation and, at best, it is a necessary remedy to heal both corporate and personal ills and restore a healthy stability (Nicholson 1987:168).

In this day and age of globalization, fluid markets, and corporate restructuring, job relocation is as much a feature of corporate culture as the more mundane business trip. Unlike the latter, however, job relocation is a long-term commitment and its implications are more far-reaching in scope and permanent in nature. Relocation affects not only

employees but entire families as well. By leaving behind a world that is familiar and moving to an entirely new environment, it necessarily involves an element of risk. For some, it means sacrificing a beloved home, a community of family and friends, and a particular life-style for the pursuit of a job or a career. For others, relocation provides them with an opportunity to make a new start, experience new things, and live a new life. Whatever the reason for making the change, it remains that job relocation is a major life-altering event and, therefore, decisions of this magnitude are not made on a whim but rather are negotiated, deliberated, and given careful consideration. How then did employees in this study reach a decision to relocate and re-establish themselves in a foreign environment? What factors entered into the negotiating process when deciding whether to move with the company or stay behind? How did these factors then influence the adjustment of employees and their families in their new environments? These questions will be addressed in the next three chapters where we will analyze the three stages of the relocation process. While the focus of the present chapter is on the first stage of relocation, which I have termed the 'anticipatory stage', Chapter 6 will be an examination of the second, or the 'familiarization stage', and the final phase - the 'assessment stage' - will be discussed in Chapter 7.

**Figure 1: Stages in the Relocation Process**  
*Stage One: The Anticipatory Stage*



**Stage One: The Anticipatory Stage**

According to Nicholson's (1987) transition cycle, expectations and motives dominate the first phase, or what he refers to as the 'preparation phase' - that phase which encompasses the entire period leading up to the point of change. The main task of the preparation phase is to come to terms with the imminent change and achieve a "state of readiness" to make the change (Nicholson 1987:180). For the participants in this study, the first phase (which I called the 'anticipatory stage') was one that can best be described as 'emotionally charged', as employees and their families *anticipated* not only the changes that lay ahead, but also the repercussions of not relocating, and the potential problems that might accrue over time in the new environment. In the weeks and months

leading up to the move, employees and their families experienced a gamut of emotions ranging from apprehension, trepidation, and sadness to feelings of relief, exhilaration, and excitement. These emotions varied from employee to employee, from family to family, and from day to day as a result of the circumstances surrounding the relocation and, more specifically, people's perceptions of those circumstances.

The decision to relocate was not something employees and their families arrived at casually. On the contrary, a lot of thought, reflection, contemplation, reasoning, and deliberation went into the decision-making process as employees entered into negotiations with themselves, their partners, and their children over the 'pros and cons' of relocating. As one employee conveyed, "there was much soul-searching and reflexivity that went on over the course of the decision-making process as I pondered what the move would mean for me and my family".

This negotiating between employees, their partners, and their children is a critical component of the 'anticipatory stage', for it is through the negotiating process that people decided whether to accept the offer of relocation or refuse it. As Figure 1 illustrates and as the remainder of this chapter will demonstrate, the manner in which this negotiating process unfolded was largely dependent on employees' perception of control over the move, which was influenced by the corporate context from which they came and, when combined with the timing of the move, gave employees the impression that they either had the choice to relocate or the contrary.

### The Corporate Context

Although the employees in this study were not entirely oblivious to the possibility of being asked by their employers to relocate, they did emphasize an important distinction between hypothetically considering the idea of relocating and actually being offered an opportunity to move. Every employee was very well aware of the fact that relocation was a corporate strategy that management could employ at its convenience for the welfare of the company. Willingness to relocate was in fact a condition of their employment. As one employee clearly pointed out, “when you’re ticking the little ‘yes’ box on the standard application form that indicates that you would be willing to relocate, you never stop to think that one day you will be asked to move...you think it’s just standard procedure when you apply to work for a corporation....”. Hence, despite their being aware of the possibility of relocating and the rumors floating around corporate corridors that the company was possibly relocating to Calgary, nothing quite prepared them for the day when the move was actually confirmed. As Keith<sup>5</sup> from Toronto pointed out:

In a sense, it didn’t surprise me, you know, because there’s been discussions. It was just a question of time. Then, ‘oh no! It’s here, it’s decision time’. That’s what it came down to. Now you’ve got to make a decision. You just sort of used to sit back there and do nothing. But then they pushed everybody into decision mode.

Therefore, irrespective of the fact that the possibility of relocation existed all along, employees and their families were always shocked or surprised when an offer to relocate was actually put to them. Although shock was the common initial reaction for employees and their families, a host of other emotions and reactions came into play

during this anticipatory stage of relocation. More specifically, the context within which the offer was made had a significant impact on the employee's perception of his or her role in the corporation and, as a result, his or her control over the entire relocation process.

#### *Announcement of the Move*

The manner in which the corporation announced its plans to relocate the entire company or the individual employee was critical in establishing the tone of the relocation process. Not all companies handled the announcement in the same way. Some employees were summoned as a group or individually at which time either the president or chief executive officer of the company informed them firsthand of the relocation, the reasons why it was taking place, and the terms under which the relocation was going to proceed. Although this direct approach was favorably received by employees, others were informed of the move secondhand. In Jean-Marc's case, for instance, he found out through his cousin in an impromptu fashion that the company he had devoted almost thirty years of service to was relocating its corporate headquarters from Montréal to Calgary. The day he found out was still etched in his mind at the time of the interview, during which he described that particular evening.

...November 19, I'll never forget it, I was with a couple of clients at a hockey game at the Montréal Forum. One of them gets up to go see his wife who worked at one of the concession stands at the Forum. I just happened to see my cousin who was sitting in front of me. I hadn't seen him and neither had he. It's that night that we found out. She [his wife] found out about it from a neighbor who called the house to ask us if we were moving and Céline answered, "what?". It's that night that the company decided to announce the move, at 5:00pm after office hours. The employees had no idea. Reporters were outside the building anxiously awaiting comments and reactions of employees as they left the building. I

must have gone past the media. Anyway, my cousin said to me that night at the Forum, "What are you doing here? Are you alright?". I was with some clients, we had just had some supper and we were at a hockey game, shooting the shit and, all of a sudden, he just throws that at me and my stomach just fell. I asked myself what kind of question was that and asked him, "what do you mean am I alright?". In the meantime, the other guy came back and his wife had heard it on the news. I was speechless....

Finding out about the move through an intermediate source, whether it be a family member, a neighbor, or the media, had the undesired effect of cloaking the entire relocation process under a veil of secrecy and suspicion. As one employee commented, "if they couldn't be up front with us about the move, it kinda makes you wonder what else they're keeping from us". Moreover, amidst a corporate philosophy that espouses collaborative work relations between management and non-management, being informed of the move from outside sources had the unintended consequence of clearly demarcating the more powerful (those with firsthand information about the company's plans to relocate) from the less powerful within the organization. This created an atmosphere of 'them against us' around the relocation process.

#### *Timing of the Announcement*

In addition to 'how' the relocation was announced, 'when' it was announced also played a role in setting the tone of the move. Although there was no apparent time during the year when employees were more or less receptive to the idea of relocating, there was a general consensus among those who were informed of the move just prior to the Christmas holidays that the timing could not have been worse. These employees thought it insensitive of the company to spring its plans to relocate right before the holidays when it could have been done at the start of the new year. Spending the holidays thinking about

what will happen to your job, whether you will even have a job in the new year, and whether you should move with your job or not, placed a serious damper on the holiday spirit and fostered a sense of resentment towards the company. As Henri from Québec explained:

I resent the company for putting me in this position during the holidays. It never fails, they have a knack for telling you that you no longer have a job during the holidays. Are you going to break up your family for work? If you decide not to relocate, they don't tell you what's going to happen to you in the long run....Nonetheless, we got through the holidays like we always had in the past. We spared no expenses, we didn't deprive ourselves of anything, we gave out lots of Christmas gifts, we didn't change a thing. The most stressful was then.

#### *Terms of the Move*

Once employees were notified of the move and the initial shock wore off, their main concern became one of, "well, how will all this affect me?" Unlike individual transfers where employees relocate individually and, therefore, are in a better position to negotiate with their superiors the terms of their relocation, those who moved as part of a group had virtually no bargaining power. The terms of the move were essentially applied across the board as a 'take-it-or-leave-it' offer. For the majority of employees, this offer came in one of two forms: 'non-selective' or 'selective'. The non-selective offers were those wherein all employees were asked to relocate to Calgary with their job, usually in the same position and for the same salary. In other words, there was no selection process involved. All employees were invited to move. Secondly, their jobs as such were not changing, only the location of their work. Those who accepted the offer subsequently moved to Calgary, and those who rejected the offer were either given a severance

package or, in the case of some employees, were given the option of remaining in the same or a different position in a branch office.

The selective offers were a little more complicated. They usually were given when employers were attempting to reorganize their operation through relocation. Cynthia, an upper-level manager who was privy to the corporation's modus operandi, explained in the following manner the rationale behind her company's selective offers:

The company had a mandate to reduce the number of white-collar employees by 25% and so what they did was a total reorganization. They looked at the company's functions and how they could be done and how many people it would take to do that. They developed whole new organizational structures, wrote not all but mostly new job descriptions, and in the end counted up all the boxes and made sure they came to 25% less.

Employees who received selective offers were essentially told that their current jobs were going to be abolished within a certain time period and that they were going to be provided with lists of jobs (most of which were new) in Calgary, asked to bid on certain jobs, rank them from most to least preferred, attach a one-page curriculum vitae to the 'bidding-form', and submit their dossier by a certain date. Although it appeared on the surface to be non-selective because every employee received equal treatment, most employees did not perceive it that way. On the contrary, employees like Jean-Marc thought the terms of his relocation offer were anything but fair.

I put in 26 years of service in that company and here's this new kid on the block who's been working with the company for a year or two and one day we're both reduced to the same status? I don't think so. Not only do I find out that as of December 14 I no longer have a job but I now have to apply for a job. The process is the same for everyone, they tell me. May the best man win! I had to fill out what I called back then a mug-sheet. It was an 8x13 standard form on which I had to indicate my job preferences, the number of languages I spoke. But it wasn't your ordinary CV. I couldn't

indicate my personal experiences, my enrichments. The rule was the same for everyone. There was justice? Everyone was supposedly treated the same. Well I had much more experience and knowledge than the new kid but on that day you wouldn't know it. On paper, we were the same. Our mug-sheets were identical.

Moreover, depending on the organizational goals and directives, some departments were reduced to a greater extent than others. Employees were well aware of this, which created for them a sense of injustice around the move.

Once the bids were in, there was an average lapse of time of sixty days before any offers were made to, not all, but a select number of employees. As a result, employees were left waiting for what to them seemed like an eternity, not knowing whether they were going to have a job at the end of it all. This inevitably created a lot of stress, anxiety, and uncertainty among employees as they waited for the much anticipated 'phone call'. The stress mounted as the calls came in and some employees were offered jobs and others were not. The experience was rather traumatic for many including Dylan whose recollection of that time period was anything but pleasant.

It was a very stressful time because I wanted to go so badly and yet I couldn't find myself a position. We would go to Moe's Bar and Grill after work, me and a couple of guys. We'd go every night for the entire process which took about two months, with the free buffet and drinks and just talk about what was happening. I must have put on 50 pounds at least. Then the calls started coming in. I was watchin'. They were getting jobs and they'd still go out, you know, with us afterwards but then two would have a job and five of us wouldn't, and then four would. It got to the point where all of them got jobs, you know, and I didn't and it was really weird.

Although Dylan and many like him were eventually offered a job, the bidding process fostered negative competition among employees. The competition got even worse

when word got out that some people were being offered better jobs (usually in the form of a promotion) while others were being offered either the same-status job (a lateral offer), a lower-status job (usually in the form of a demotion), or no job at all. This could hardly lead to the perception that the relocation was a fair and even process. Consequently, it created a very tense and somewhat hostile work environment. As Henri recalled:

The climate at work was such that people began to...not so much cut the other one's throat but saying things like 'I'm better than you' etc...and getting stabbed in the back by people who were once your colleagues.

Feelings of desperation amongst employees also began to escalate as time passed and no offers came through. Many employees engaged in what they called 'calling-in favors' in an attempt to secure themselves a position within the company. As one employee from Québec clearly stated:

I, uh, contacted a few Vice-Presidents that I knew, and I started pushing some buttons for things that I'd done in the past. Uh, I kinda had a couple of favors that were owed to me, so let's say I, I pushed enough buttons so that at the end when it was getting...I mean I was getting very desperate because I knew my, my termination date was coming. I was watching people being terminated right in front of me...so I, I started really panicking and, and calling a couple of VPs to the point where I was told, "look, you're gonna get a job, relax!".

Taken together, employees in this study essentially came from one of three corporate contexts: (1) they heard about the move either firsthand or secondhand and received selective offers to relocate (with the possibility of opting for a severance package); (2) they heard about the move, usually firsthand, and received non-selective offers to relocate (with the possibility of opting for a severance package); (3) they heard about the move, usually firsthand, and received non-selective offers to relocate (with the possibility of opting to remain behind in the same or a different position).

#### Perception of Control

Having some understanding of the corporate context within which employees were asked to relocate is important if we are to assess their perception of control over the move. By perception of control, I mean the impression of being in charge of one's life. Given that in this study the company was the initiator of the move and dictated the terms and procedures of the relocation, the issue of control is, in reality, illusory. Perhaps in no other situation does someone relinquish control of their lives and place it in the hands of the corporation to the extent that one does in the case of group moves. However, depending on the corporate context from which employees came, some perceived themselves as having more control over the relocation to Calgary than others. In essence, the more direct the company was in its announcement of the move to its employees and the fairer the terms of the relocation (non-selective over selective offers), the greater employees' perception of control over the move. Malcolm, who received an invitation to move to Calgary immediately upon direct notification of the company's intentions to relocate, perceived himself as being in control of the move.

When we were all called to a meeting with the president of the company and he told us about the company's plans to relocate to Calgary, we were all scared for our jobs. I remember thinking, 'that's it, I just lost my job'. But then they told us that we were all invited to relocate with the company. We'd get to keep our jobs, same position, same salary. We'd only be in Calgary instead. You could see the relief on people's faces. I was so relieved. At least I still had my job and I could decide whether I wanted to move with the company or take the severance package. I felt a lot better knowing that the company wasn't just hanging me out to dry, you know. They did their part and now it was up to me to decide. But at least I had options and that was reassuring.

By contrast, an employee from Québec who had been awaiting news for months about a job he had bid on and eventually got after several failed attempts, had a very different perception of control over his move to Calgary.

He called me at 2:10 in the afternoon.... He said, 'listen, we're in the process of forming a service group in Calgary, are you interested?'. My job was going to be abolished in a week....of course I was interested! 'What position would interest you?', he asked. 'I'm ready to do anything, just tell me what to do'. That's when he told me about the position and that it would entail a 25% salary cut. He then said, 'think about it...I'll probably call you tomorrow with the details'. 'What do you mean, probably?', I asked. 'Is there a problem?'. He said, 'well, I'll call you tomorrow'. He called me at 1:00 the next day and said, 'here's the deal: your salary is this, your position is this, your job starts March 1 at St. Luc and probably the month of August in Calgary. Do you accept, yes or no?'. You don't have 5 minutes to think about it. It's yes or no. I told him 'yes'. He asked if I wanted to consult my wife and I said, 'no'. We had talked about it for the last 3 months. I knew where she stood. This was Saturday and he was going to fax all the paperwork to me on Monday at the office for me to sign. I told him, 'send them right now. I have a fax at home and I'll sign it ASAP'. He told me it could wait until Monday and I said 'no, send it all right away! I won't give you a chance to change your mind'. That's the bath we were in. A bath of despair.

This employee's perceived lack of control is manifested in his desperation to secure a job, any job, even a lower-paying one. As Craig Pinder (1988:56) discovered in his own research on corporate transfers, "this fundamental loss of control over one's self and one's financial, social, and familial circumstances can have powerful psychological effects on people". In the case of this particular employee and others in similar circumstances, feelings of despair, desperation, and paranoia were among some of the effects brought on by perceived loss of control. Hence, as a result of the corporate context within which employees were asked to relocate, employees entered the decision-making process with very different mind sets. They entered the negotiating process feeling like

they were either the masters of their domain, in complete control of the relocation process, or the contrary. Consequently, as the next section will demonstrate, employees' perception of control or lack of it influenced the manner in which they negotiated and rationalized the move.

#### 'Should We Stay or Should We Go?': Negotiating the Move

One of the freedoms we enjoy and perhaps take for granted in democratic society is the ability to choose where to live and raise our families. Corporate relocation challenges that freedom by proposing a new place of work, a new place to live, and in essence, a new way of life. For this reason, job relocation is a major life change and as such requires careful consideration.

The employees in this study did not find the decision to accept the offer of relocation and move to a new environment an easy one to make. On the contrary, while relocation may have its perquisites, there is also a significant loss that comes with having to give up a familiar way of life. But despite the losses, some employees and their families decided to move to Calgary. The desire to follow their jobs may have been the reason that spearheaded their decision to move, however, it was not the only - and for some, not even the most important - condition of the move. Their decision to move from Ontario and Québec to Alberta was made on the basis of a combination of 'push' and 'pull' factors which they considered and reconsidered. As the next few pages will demonstrate, their decision was made in light of imperative structural (e.g., political,

economic, socio-cultural, organizational) and individual (e.g., familial, human capital) constraints.

#### *Political Antecedents*

When deciding whether to relocate to Calgary, the political context in which employees currently lived was, at least for the overwhelming majority of Québec employees, a major 'push' factor that invariably tipped the scale in favor of relocating to Calgary. This was not so much the case for employees from Ontario. A few Ontarians with a penchant for minimal government intervention and conservative economic policies expressed some dissatisfaction with the burgeoning provincial debt created, in part, by the enormous expenditures on social programs of Bob Rae's New Democratic Party, the government at the time of relocation. The more liberal-minded Ontarians commented on the increasing cutbacks instituted by Mike Harris' Conservative government and the effect that was having on the province in general. However, despite some murmurs about the political situation in Ontario, the politics in Ontario as such did not weigh very heavily on employees' decisions to relocate to Calgary.

By contrast, the political turmoil in Québec was at the forefront of the negotiating process for both French and English-speaking Québécois. The last decade was unarguably the most politically turbulent in Québec's history, given the consecutive defeat of the Meech Lake and Charlottetown Accords in 1990 and 1992, respectively, followed by the rise to power in 1993 of the Bloc Québécois as the official opposition party to Jean Chrétien's Liberal Party and the re-appearance of the Parti-québécois on the provincial stage in 1994. For the majority of Québec employees who relocated to

Calgary, however, the near victory of the PQ's 1995 referendum was the proverbial straw that broke the camel's back. Both francophone and anglophone Québécois were consumed by the endless political rhetoric, enraged by what they felt was the senselessness of separation and its deleterious effects on the province's economy and extremely concerned about the province's future not only for themselves but, more importantly, for their children. Barbara's decision to accept the offer of relocation was, as she explained it, "a rational decision based on irrational fears". The fear of political instability and the uncertainty it created *vis-à-vis* the future of her children was the main reason she left Québec. Moving to Calgary was the Quebecker's ticket out of Québec and, therefore, unlike his or her counterpart in Ontario, the political situation in Québec served as an influential bargaining chip in the negotiating process. Patty from Québec who relocated with her company and her husband Michael, expressed what many English-speaking Québécois felt *vis-à-vis* the politics in Québec.

It sucked. It's a joke! If it wasn't for the politics, we would not be here. Montréal would still be the number one city in Canada if it wasn't for the crap going on....And it's nothing against the French culture. No. French people are great people, they're a lot of fun, they're normal people like anybody else who are concerned with making a living and providing for their children just like us. It's the politics! Those damn politicians. They ruin it for everybody.

Sentiments among Québec anglophones ranged from feelings of discouragement, disappointment, sadness, and concern to feelings of anger, frustration, irritation, and disgust towards a province they held dear and would otherwise not have left were it not for the fact that they felt it was being ravaged by politicians. The younger employees admitted to feeling betrayed when they felt they were being forced out of a province they

did not want to leave despite their sympathy for the French cause in Québec. As Peter, a twenty-five year old who reluctantly left Montréal, pointed out:

I really had a lot, a lot of French friends and I spent a lot of time with French people, I went out with French people so I really got their side of the story and I guess I really understood a lot about where they were coming from and what they were fighting for. I mean I wasn't pro-separation, definitely not, but I guess I was never really against their cause. I got to see both sides of the debate but it was really just constant...all over the place politics, politics, politics! Can't we talk about anything else? I'm bilingual and damn proud of it. I can speak both languages and I interact with as many French people as English people. Why, then, are politicians still trying to push me out? After years of pushing and pushing, I got the message. I was no longer welcome in my own home, the only home I've ever known. That's truly how I felt.

French-speaking Québécois held similar views about the political situation in Québec. As *Québécois de souche*, they held the same sentiments of sadness, despair, concern, frustration, and betrayal as their anglophone counterparts. In addition, they also shared feelings of shame, embarrassment, and defeat as they acknowledged the success that they, as a French nation, have attained since the 1960s and they believe has been undermined by a select group of relentless politicians who will stop at nothing to drive home their point even at the expense of those whose rights they are supposedly protecting. For some French-speaking Québécois like Julien and Véronique Archambault, politics was the main impetus behind their move to Calgary.

Let's say that the driving force was the chance to leave Québec because we didn't agree with the politics. They're always talking about separation and that's one project we don't agree on. As francophones in Québec, if we happen to mention that we're not for separation, we're almost looked on by family and friends in a negative light. Or just from what we read in the papers. It's propaganda!...We're francophone, both born and raised and educated in Québec and I couldn't even send my own children to English school. How humiliating is that? How oppressive is that?

This is not to say that the francophones who did move to Calgary were unsympathetic to the French cause. On the contrary, they were proud of their Québec roots and many were staunch nationalists who identified themselves primarily as Québécois. But they were mentally exhausted from the constant bombardment and threat of separation. What they sought was political tranquility and, for many like Frédéric, the opportunity to leave Québec for this reason alone was appealing.

I was fed up of all the blubbing, the incessant complaining, the sovereignty issues. I just couldn't handle it anymore. I just couldn't. I was fed up. That's one of the reasons, I won't say the main one, but it's certainly one of the reasons why I was tempted to come here so that I just wouldn't hear it anymore.

Through friends, colleagues, the media, and occasional business trips to Calgary, many employees were well aware of the fact that politics did not occupy nearly the same discursive space in Alberta as it did in Québec. Although Alberta's political stability and tranquility was not a major pull factor in the decision-making process, employees did comment on the fact that it would be a nice change to live in an environment that was not as politically loud and volatile as Québec.

#### *Economic Antecedents*

In addition to political conditions, economic conditions played a large role in the negotiating process, particularly for employees from Québec. Although some employees from Ontario expressed some concern over the rise in taxes, the increase in unemployment, and the low housing market, the economic context of Ontario did not constitute a major push to leave the province. On the contrary, Ontarians for the most part were secure about Ontario's economic position within Canada. Ronald, an employee who

relocated from Oakville, Ontario described the economic context of Ontario in the following manner:

I think where we lived is something we called the golden horseshoe...there's a lot of opportunity there. Oh, heck yeah, I mean that's the engine of Canada, the golden horseshoe...You know, you go up and down the QEW everyday, the 401 and...it's just warehouse after warehouse, industry after industry. I mean I probably could have picked up something in Toronto if I hadn't come here. That wouldn't have been a problem.

While Ontarians, on average, had a positive outlook on Ontario's economy, there were some who, as a result of having lived outside that province, had a somewhat different perception of the economic situation there. After having lived in Halifax, Montréal, Victoria, and Vancouver, Matthew's view of Ontario's economic context posed a direct challenge to Ronald's.

I got the feeling Ontario was dying economically because Ontario had always been the center of Canada. It's always been the place to go. And slowly but surely, after living in Vancouver, I started to realize that western Canada was growing immensely. But Ontario wasn't as much. When you think of Canada, you don't think of Toronto anymore, you think of Vancouver...you think of the western areas. Ontario's not the heartbeat of Canada anymore.

Despite these different perceptions, the economic context of Ontario was not a significant push factor for Ontario employees. The economic context of Alberta, however, was somewhat of a pull factor for several Ontarians. The fact that Alberta had no provincial sales tax, real estate was much lower, Calgary was booming, and the overall cost of living was significantly less in comparison to Toronto were all definite 'pros' for relocating out west.

While Alberta's economy was as attractive to Québec employees as Ontario employees, it was the imminent demise of the economy in Québec that pushed some Québécois out of the province and influenced them to move to Calgary. Québécois did not have to live outside Québec to realize that its economy was in dire straits. All they had to do was walk around downtown Montréal and take notice of the increasing number of boarded-up shop windows and bankruptcy signs to know that the economy was in trouble. Jacques, an architect from Montréal who relocated to Calgary in 1998, was extremely dismayed by what he saw as the rapid regression of what once used to be an economically vibrant metropolis.

The reminder was walking around downtown on your way to work and having to deal with various 'obstacles' - namely, the panhandlers. You saw more and more people begging for money and, at one point, you start asking yourself, 'where the hell am I? I'm not in a third-world country'...By contrast, when I came to Calgary on business, I felt refreshed. I saw construction sites, cranes, bulldozers in motion. Buildings were being built...It inspired a sense of trust in the economy, a sense of trust in investments. That's how Montréal used to be. Not anymore. The only construction site I saw in Montréal for a long time was the Molson Center. How sad is that?

Moreover, Québécois were acutely aware of Québec's high unemployment rate, exodus of high profile corporations, and so-called 'brain-drain'. All of them personally knew people who had already left or were in the midst of leaving (usually for Toronto), either with their company or on their own in search of better opportunities. Maria's husband Steve, who sold his business in Montréal and followed his wife who moved to Calgary in 1996, had firsthand knowledge about this phenomenon.

I had my business in Montréal for ten or eleven years in financial services and I mean I was becoming a severance expert. ...All I did were severances 'cause everybody I knew and all my clients were getting fired

and terminated 'cause all of the businesses were closing and moving. It was happening all over the place. I must have done 15 terminations at CN, 10 at CP...It was all over the place. I mean, it's crazy! It was total insanity!

Québecers referred to this mass migration of businesses and people as the 'wave', and many of them desired to be part of that wave for their own sake as well as that of their children. Their future and their children's future in Québec was a constant source of worry for many employees. This was especially true for unilingual anglophone Québecers who did not want to miss the boat, so to speak, and be without a job in Québec. Their employers until then were primarily anglophone and business was conducted for the most part in English. Thus, the language issue at work was never problematic. However, this was not necessarily the case in other companies. Language, perceived as a barrier, therefore posed a serious threat to securing any type of job in Québec and for this reason the incentive for English-speaking Québecers to accept the relocation and move to Calgary was particularly strong. The alternative - that is to say, refusing to relocate or not being offered a job in Calgary - was unthinkable. Dylan summed it up in the followed manner:

What would the worst case scenario be if I wasn't offered a position in Calgary and offered a severance package instead? I'd have a chunk of change in the bank which would probably tide me over for the next 3 years, maximum, if I was really good with my money, walking the streets of Montréal with no French, two kids, just bought a house, and no job. Uhm, not a good scenario.

Many anglophone Québecers who were in the same position as Dylan expressed feelings of relief when offered relocation to Calgary. The move not only provided them with the opportunity to get out of Québec with a job in hand but it also relieved them of

much of the financial burden that they would otherwise have had to assume if and when they eventually moved out of Québec. Thus, with the price of housing extremely low in Montréal, employees would have lost a lot of money on the sale of their homes were it not for, among other benefits, the fact that most of the relocation packages offered employees equity protection on their homes. As a result, this financial arrangement cushioned the blow for many Québécois home-owners and gave some employees the added incentive to leave Québec.

*Familial Antecedents*

Although political and economic issues entered into the decision-making process and played a greater role for some employees than others, they both took a back seat to what I refer to as familial factors. Except for those few employees who were single at the time they were asked to move, the majority of them did not relocate alone and, as a result, the decision to move was made in consultation with partners and children. Families considered not only how the move was going to affect the employee in question but every other member of the family as well. Unlike the first two sets of factors, this factor was the most difficult to deal with as it was more personal in nature and, therefore, not as readily negotiated. In essence, this factor reigned over the rest because it either propelled or put a halt to the entire negotiating process. Employees from Québec and Ontario were quite adamant about the fact that the move would never have transpired if their partners had refused to relocate, irrespective of the economic advantages to be gained by relocating. Having the support of their partners was, therefore, critical for all employees.

Although the partners of employees were generally supportive of the move, some took longer than others to come to terms with and accept the relocation. While some partners were “thrilled” and “excited” about the move from the very start - sometimes even more so than the employees themselves - and, therefore, did not require much convincing to relocate, others were less optimistic about relocating. The reasons for that ranged anywhere from not wanting to leave their family and friends, to not wanting to forsake a job or career they enjoyed and from which they derived much satisfaction. Those who were excited about moving, for the most part, were either not employed at the time their partners were asked to relocate or, if they were working, their jobs were portable so that obtaining a transfer or finding a similar job in Calgary did not pose any major difficulties. Some were also at a crossroads in their own work, in that their job or career was not going in the direction they desired and they were soon going to be either out of a job or looking to make a career change. These partners looked upon moving to Calgary, therefore, as an opportunity to turn their professional lives around. Besides work, many of them were also at a stage in their personal lives where they felt they were due for a change. The move to Calgary afforded them an occasion to get out of the rut they were in and, among other things, experience something new, embark on an adventure, break free from familial obligations, and establish a new social network. As a result, the partners who were most supportive of the move were those who in their estimation had “nothing to lose and everything to gain” by relocating to Calgary.

Not all partners, however, viewed the relocation offer in a positive light. Many of those who were hesitant about making the move had no compelling desire to change their

current circumstances. Those who had fulfilling jobs or careers found it especially difficult to be supportive of the move. Many felt “torn” between supporting their partner’s career and furthering their own work ambitions. On the one hand, they recognized the move as being a good career opportunity for their partner yet, on the other hand, they were reluctant to sacrifice their job or career to accommodate the demands of their partner’s employer. For most partners in this position, agreeing to relocate meant relinquishing that part of their identity to which they attached a lot of significance. For some like Manon, the effect of having to give up an intrinsically satisfying job was analogous to mourning the death of a loved one.

Aaaahhhh! I can just start crying again. I was so sad. I cried and I cried. It’s a bereavement. I had to grieve. It took me a while to get over it because for me, it was more than just work. I loved what I did...it was a part of who I was. I was losing that part of myself by moving to Calgary.

However, as difficult as this decision was to make, many like Manon ended up supporting their partner’s relocation simply on the basis of pure economics. From a strictly financial point of view, it made more sense for them to move because the employee’s remuneration and social benefits exceeded those of his or her partner. In light of this fact, the partners of employees eventually came to accept and support the decision to relocate not only for the benefit of employees but also for the family as a whole. Employees, as a result, were extremely appreciative of their partner’s willingness to “sacrifice” their own needs for those of the family.

This was especially true in the case of those francophone employees from Québec whose partners were unilingually French and, therefore, stood to lose even more in relocating to Calgary because of the language barrier. Besides being unable to work in

Calgary, these partners (who happened to be women) were concerned with how they would get along on a daily basis in an anglophone milieu. Although this linguistic “handicap”, as they referred to it, caused them significant stress, it did not deter them from moving to Calgary. On the contrary, they chose to confront this impediment by learning the language. Céline, for one, was not about to let her inability to speak English stop her from moving to Calgary with her husband and children.

Our street in Montreal was full of anglophones. It was the joke of the street. They would say to me, ‘but it can’t be...it’s all you francophones that are going to Calgary...francophones that don’t speak English and us English people are staying in Québec!’. (laughs) They couldn’t believe that I would support my husband and go to Calgary. They thought he was forcing me to go. I told them, ‘no, it’s my choice. I’m going and that’s that. I’ll learn English. I’m not dumber than anyone else. I’ll learn it!’.

Others approached this deficiency not so much as an obstacle they had to overcome but more as a challenge they had to rise above and meet. Manon explained her determination to learn English in the following manner:

I didn’t speak English. Not a word. I didn’t understand a thing. Ketchup, mustard, hamburger, hot dog, that’s it. That was a little scary for me but there was a challenge to learn it. Because in Québec I wasn’t obliged to learn English. I worked in French, I’ve always worked in French and I was never confronted with English. I knew I could learn it, I just had to prove it to myself.

Although the support of their partners was important, the opinion of their children also had an impact on the decision-making process. In general, those with children under the age of five did not experience too much trouble making a decision to relocate. However, those with children over the age of five and, particularly those with teenagers, had the most difficult time trying to persuade them to move or at the very least get them to entertain the possibility of moving. Friends were the main reason why these teens

resisted the idea of moving. Leaving their friends and, to a certain extent, family, a part-time job, and their social life behind in order to follow mom or dad's work was unfathomable and parents were well aware of that. With this in mind, they broached the idea of moving very cautiously, and tried to involve them as much as possible in the decision-making process. They explained to them the reasons behind the move, answered the standard questions of why, where, when, how, and encouraged them to open up and share their feelings about the move.

Many parents also resorted to what I refer to as 'selling' the idea of moving whereby they accentuated the perquisites of relocation (i.e., moving into a new house, a nice neighborhood, getting their own bedroom, discovering the West, Banff, and Jasper) in an attempt to entice them to make the move. While this tactic helped some children come around and eventually embrace the move, it had absolutely no effect on others. Keith, who relocated from Toronto in 1995 with his wife and two teenage daughters, tried to sell the idea of Calgary to his girls but to little avail.

They weren't going to buy it. It was no sell. There was nothing that could sell it. New high school, no friends, a city they didn't know...I was just trying to sort of...explain to them why we made the decision which, um, they heard but didn't understand...

Although moving was traumatic for all the children involved, the francophone children were further disadvantaged in terms of language and, therefore, more averse to the idea of moving than their English-speaking counterparts. With the exception of perhaps one or two children who, having moved from a predominantly English neighborhood in Montréal were essentially bilingual, the children of French-speaking employees were unilingually French. The idea of moving to an English city where they

did not know the language and potentially could become a source of ridicule as a result, scared them more than leaving their friends and family behind. Stéphanie, who relocated with her parents at the age of six, explained in the following manner her concerns about leaving Québec:

I didn't want to leave my friends in Québec. But more than that, if someone asked me 'what's your name?' in English, I was scared to say 'what? what?' and then have to go inside the house and tell my mother that I didn't understand...and I was scared that they would laugh at me because I didn't have any English yet.

Québécois parents handled their children's fears in much the same way they handled their own - by convincing their children to challenge the problem head on. As a matter of fact, they used that very fear as their sales pitch for moving to Calgary. Many of them told their children that by moving to Calgary they were going to have an advantage over their Québec friends in that they would be bilingual and thus never have any reason to be scared again. Like the other children whose parents resorted to various strategies to encourage them to make the move, some were more receptive to those efforts than others.

This being said, as important as their children's attitude towards the move was to employees, they did not base their decision solely on that, for as many explained, "if I would have listened to my children, I would have never moved". As a matter of fact, several employees and their partners moved without their young-adult children. As painful as this was for some, their decision to move was based on a combination of other factors. Needless to say, having the support of the children certainly facilitated the decision-making process for all concerned employees.

*Socio-Cultural Antecedents*

When contemplating making a major life change like moving across the country and starting anew, employees inevitably thought about the losses they would incur as a result. These losses usually centered around family ties, social relationships, and culture. Employees from both Québec and Ontario were concerned about the significant distance involved and how this would affect family relations in particular. Many were reluctant to relocate because of various familial obligations. For instance, several had elderly parents whose precarious health was cause for concern and the idea of being so far away from them filled them with an enormous sense of guilt. Others played specific roles in the family such as that of “support-giver”, “nurse-maid”, “social organizer”, “family peace-keeper”, “family mediator”, “family repairman”, to name a few, and the thought of being divested of that role as a result of the move saddened them to no end. Being away from the family also meant being away from a support network that many drew comfort from and grew rather dependent upon, especially if they had children. As a result, employees who were particularly close to either their family as a whole or specific members such as a sibling, cousin, or aunt had a difficult time deciding whether to move.

Employees also considered social relationships and how the move would affect those friendships that took years to cultivate and, like family, provided a huge source of emotional and social support. Several employees were actively involved in various sports leagues (i.e., hockey, soccer, bowling), pursued certain leisure activities (e.g., hunting, fishing, golfing), and were regular members of clubs and associations like their local Legion, the bridge club, and school-related associations like the PTA. These activities

and the friendships that developed through participation in these various activities were taken into account by many employees and their partners when deciding whether to relocate.

The idea of leaving family, friends, and social activities behind was emotionally devastating for most employees and their families. Feelings of sadness about moving and leaving their loved ones behind were, for some employees and their partners, compounded by feelings of selfishness and guilt. Some felt selfish for choosing their job over family and friends, and guilty for not having chosen the alternative.

As difficult as leaving family and friends was for all employees, those who moved from Québec had, in light of this significant loss, a particularly hard time reconciling their decision to move. In part, the reason for this was that the majority of Québec employees (particularly the francophones) who relocated were first-timers and, therefore, unlike many Ontario employees, had never experienced such a change and the losses it entailed. Moreover, most Québécois families (both anglophone and francophone) were geographically concentrated and not as dispersed as many Ontarian families. Many employees from Ontario had parents and siblings who lived in various parts of Ontario, Canada, and even the United States. Therefore, the ties had already been severed so to speak. Although the distance would have increased substantially by moving to Calgary, as many employees pointed out, “the break had already been made”. This was not the case for many Québécois employees. Their families had been in Québec for generations, and very few members of their families ventured out of Québec. As Liette pointed out:

Québecers never leave Québec. At least French-speaking Québecers do not. That's the reputation we have and it's true. It's still like that. Me, I'm a rare bird that left Québec.

Besides the novelty of relocation and the matter of geographic proximity of family, the third reason why both French and English-speaking Québecers experienced more difficulty in deciding whether to accept the offer of relocation than Ontario employees was their particular attachment to Québécois culture more generally, and the Montréal way of life more specifically. Ontario employees, for the most part, never really entertained the issue of culture during the negotiation process. While some certainly commented on the cultural richness of Toronto in terms of its ethnically diverse population and myriad of cultural events, their attraction to the culture per se was not cause for hesitating about whether to move to Calgary or not. On the contrary, a couple of employees mentioned that the enormity of Toronto, the increasingly high rate of crime in the city, as well as the exceedingly fast-paced, superficial, and somewhat robotic life-style that was in vogue in Toronto served, if anything else, to push them out of Toronto and accept the relocation to Calgary.

For Québecers, culture assumed somewhat of a greater role in the negotiating process. Though francophone employees were functionally bilingual, many felt much more adept in French than English as far as speaking, writing, thinking, feeling, and expressing themselves were concerned. Working in English and living in English represented two very different realities for francophone employees. While at work, they were rather comfortable speaking in English for they were familiar with the terminology that was appropriate to the industry. However, outside of work, they conducted their lives

entirely in French and, within the context of Québec, that was perfectly normal. They rarely employed any English and, if they did, they felt there was no societal expectation for them to be particularly well-versed in that language. Moving to Calgary would change all that, and they quickly became sensitized to that fact. Sébastien, an employee who relocated from Montréal in 1996, spoke for a number of French-speaking Québécois when he said the following:

One of my concerns before leaving Québec was how well I was going to integrate in the Calgary community. I perceive myself as being perfectly bilingual, but in the context of work. For me to go to a hardware store and ask for this piece of hardware or this specific tool...well I'm sorry, this particular tool, I don't know what it's called in English.

In addition to not knowing the specifics of the English language, francophone Québécois became acutely aware of their French accent and, while this was never an issue in Québec, it suddenly became an enormous consideration when they contemplated moving out west. If anything, this issue crystallized for them their minority status in relation to the rest of Canada and made them aware that, if they moved to Calgary, they were going to become a distinct minority. Olivier recalled thinking about his very noticeable accent when deciding whether to move to Calgary and wondering how it was going to affect him.

...When I was at work in Québec, they understood I was a francophone, therefore, they tolerated my heavy accent...Even if I spoke English in Québec, I wasn't shy to speak it because in Québec, it's normal for an anglophone to hear a francophone speak English with an accent. Calgary, though, is English. My accent would stand out like a sore thumb. I thought that would make me very uncomfortable. That would make me stand out. That would really make me feel like a foreigner. In Québec, if I spoke English, I never felt like a foreigner but in Calgary, I would definitely feel like a foreigner. I wouldn't speak like them. I found that tough and I had to think about whether I was making the right choice coming out here.

Francophones were well aware of the fact that by virtue of being a distinct minority, they were going to miss the French aspect of day-to-day life such as hearing the language in the streets, going to a French movie or variety show, and having a wide selection of French television stations, radio stations, newspapers, magazines, and books at their disposal. Culture, however, is more than just language and books. It is an organized system of shared meanings, perceptions, and beliefs held by persons belonging to a particular group or, in this case, region. Culture is a way of life, a way of seeing the world and one's place within it. Culture is about familiarity and is very much ingrained in people's social identity. It is in reference to this aspect of culture that both French and English-speaking employees from Québec experienced difficulty deciding whether to make the move to Calgary or not. Unlike their counterparts from Ontario who, by and large, did not feel any special tie to Toronto, every employee from Québec, without exception, alluded to some sort of magnetic pull that the city of Montréal, in particular, had for them. Irrespective of the political and economic realities of the province, Québécois were sentimentally attached to Montréal. Victoria, an employee from Québec, described in the following manner her attachment to the city:

...The attachment is strong...there's a real sense of belonging there...it's a hard thing to say, it just becomes part of you, it's part of your life-style, it's a way of living, it's an outlook, it's a point of view, it's a very different kind of existence, it's like a fit, it's like an exact fit...It's the ambiance, it's a city that's not just functional that you work and leave. It's a city that's part of your existence. It's a city that has passion, it's in the air, it's the ability to go down the street, buy some croissants, sit out, buy your newspaper and hey, buy some flowers on the way back...The soul of the city...it permeates the air...it's the bus-driver giving you the eye, you know...the construction worker giving you the look...it's a very engaged

life...it's the bus-driver giving you that 'bonjour' that has meaning and leaves you chuckling like mad when you get off.

As much as employees pondered the loss of family, friends, and culture, their decision in the end was to accept the relocation offer in spite of these losses. This decision was not arrived at easily and, much like the familial factors discussed earlier, these factors were emotionally taxing on both employees and their families during the negotiating process. As difficult as it was for employees to imagine leaving Québec for the reasons just discussed, it is important to mention that what eased their conscience and somewhat facilitated their decision to move was not so much the sense of support as it was the show of approval they received from people who were staying behind. In other words, it was those who recognized the political and economic precariousness of Québec and acknowledged the necessity of the move that somehow legitimized the employees' own decision to relocate. As Jean-Marc explained:

Several people said to me, 'you're lucky to be getting out of here'...man, that did something to me. And it wasn't just anglophones who said that to me. I'm talking about francophones, too, who said to me 'heh, man, what we would do to trade places with you'. People said that over and over again to me. I wouldn't say that's what did it for me, that's what made me move but it certainly made me think, well, perhaps this isn't such a bad idea. Maybe I should move....

Although societal approval helped some employees come to terms with their decisions to relocate, the majority of both Québec and Ontario employees and their families decided to move on the basis of other factors that were more financial and job-related.

*Organizational Antecedents*

Some employees moved because the company's relocation offer was, as many described it, "too good to pass up", "too hard to resist", or "too sweet to walk away from". Although most of the relocation offers were lateral - meaning the employees relocated for the same job, same position, and same salary - some employees were offered higher paying jobs or equally salaried but different jobs with opportunities for further advancement. Only one employee in this study relocated for a lower paying, lower status position. For some employees, the fact that the relocation entailed a promotion was the primary incentive for moving to Calgary. For others, the idea of working at a different and somewhat more challenging job where opportunities to get ahead were abundant greatly influenced their decision to move. As one employee explained:

...I had gone as far as I possibly could in my last position...I couldn't go up any further and most of the management was here in Calgary...If you had the chance to get to Calgary, it's your chance to shine. And I'm ambitious, I'm not going to sit there, you know and vegetate. I'm going to go out there and do whatever it takes to get a better job. And this was the place. You either make it or break it here.

Although employees gave some consideration to the type of job or position offered during the negotiating process, the organizational factor that exerted the strongest influence over employees' decision to move was company tenure or the number of years worked for the company. Given that the majority of the moves were lateral, many employees based their decision to relocate to Calgary on the extent of their investment in the company. The larger their investment in the company in terms of years of service and accrued pension benefits, social benefits and vacation time, the more difficult it was for them to refuse the relocation. For those employees who devoted many years and

essentially progressed through the ranks of the company, the decision to move to Calgary was essentially a “no brainer”. The idea of starting over from scratch with a new employer was inconceivable, and for many like Ryan who, after putting in 32 years of service with the company, was not about to risk losing everything he had built up over the years by refusing to relocate.

I decided to move because of my years on the job, pure and simple. Had I not accepted to move, all the progress I made within the company would have fallen to 50%. I would have lost half of my investment in the company... I started in 1964 and by 1971, I was part of management. We're talking about 1996, so I had already accumulated 25 years on the management side. That's why I relocated because you have to think about what you've accumulated in terms of your future. You have to make sacrifices for that.

This consideration was especially true for those employees who were close to retirement age. In addition to having invested so much in the company, the fact that retirement was just around the corner was yet another reason for some not to refuse the relocation. Employees referred to this particular organizational constraint as the “golden handcuffs”, whereby those who were in the unenviable position of having dedicated many years of service to the company and being a few years shy of retirement, described themselves as being “at the company's mercy” with regards to the move. An employee by the name of Edward, who was approaching retirement when he was asked to relocate, described in the following manner his position *vis-à-vis* the relocation offer:

At my age, starting my life over again was out of the question. I'm 55 years old. And so it means leaving my children, family, friends, and the lady I'd been living with behind because I'm 55 and close to retirement. In the oil industry, they usually start early retirement at 55. And I've been with the company for 30 years. I didn't want to walk away from retirement and so that's why I moved out here.

Apart from those employees who had put in a lot of time with the company, and those who were close to retiring, several others also felt pressured to relocate as a result of organizational constraints. These constraints, however, went beyond company tenure and the job itself, and centered on financial obligations which were undertaken as a result of being employed (i.e., mortgage payments, car payments). These constraints, in turn, rendered employees dependent on the company and, for many of them, it was this dependency that propelled them to accept the relocation offer. As Brendan explained:

You're at the company's mercy, literally. You're 22 years old, single, making minimum wage, and you're damn happy. Then you do what society wants, you go out and get married. Now you're bringing in two salaries, usually, and you're doing good. Then you buy a house and a car, kids come along... You're doing all the right things and following the norms of North American society. But all you're doing is sucking yourself in and employers love it 'cause now they've got you. He's not going to flutter away and quit. Unless of course, you're one of those key people with a big education and with four impending job offers out there. Then you can tell 'em to shove it.

#### ***Human Capital Antecedents***

Brendan's concluding statement about employees' education and marketability and how it places them in a better bargaining position *vis-à-vis* their employers brings us to our next set of factors - which I referred to as human capital factors- which also entered into the decision-making process and played quite a significant role in employees' decisions to relocate. Human capital is the productive investment of resources in human beings and, in economics, this investment is appraised in terms of economic returns. Investment in human capital begins in the family and continues in school and higher education. This investment keeps growing in the workplace as human beings acquire and accumulate generalized and specialized skills that subsequently make them

attractive to potential future employers. The greater one's investment in human capital, the better his or her bargaining position will be. In other words, the more education an employee has and the greater his or her skill set, the more marketable that employee will be and, therefore, the better position he or she will be in to negotiate terms of employment.

Both Québec and Ontario employees considered relocating in light of these human capital factors. Some employees viewed the move as an opportunity to increase their human capital investment and chose to relocate for that reason. Moving to Calgary and working at corporate headquarters was, for many of them, an occasion to be "where the action is". That is to say, by working at the "brain center", they would invariably be exposed to a number of different tasks and assignments which would expand their skill base and, more importantly, facilitate their climb up the corporate ladder. For this reason, the overwhelming majority of employees who at the time were in the process of forging their careers saw the relocation to Calgary as a strategic career move. Jessica, a 24 year old francophone Ontarian who relocated with her employer of one year, justified in the following manner her decision to move:

You know that when you work for [name of the company] it's the kind of job you want to keep...because it gives a lot of promotions and a lot of advancements. Whereas a lot of other companies...they can't produce that kind of advancement... And I enjoyed what I was doing. I learned a lot...and I didn't really want to give up the job and the opportunities to move up in the company. Moving with head office was important to me. It could have been Winnipeg, Vancouver, Saskatoon...it didn't matter where. I was going because that's where head office was and that's where the opportunities to advance were.

Employees with more limited human capital, however, regarded the move not as an opportunity to increase their human capital investment but more as a matter of job security. Although some of the employees who relocated did so primarily out of satisfaction for their work and their employer, they also realized that irrespective of their valuable work experience, they lacked the required educational credentials to get a better job elsewhere. This realization became a serious consideration in the decision-making process for these employees and provided a push towards the move to Calgary. Several other employees who relocated to Calgary may have had the educational qualifications but lacked the appropriate skills necessary to secure another employment. These employees were more often than not what people in various industries refer to as “lifers”. These were employees who began their careers and intended to end their careers within the same organization. The majority of these “cradle-to-grave” corporations, as they were called, were very specialized in their functions and their employees, for the most part, had acquired and developed specific skills that were pertinent to that particular organization. As a result, their skills were not transferable to other organizations. With the exception of various employees who worked in up-and-coming areas such as information technology, where the skills they procured were easily transferable to other corporations, many had skills that were industry-specific and, thereby, unmarketable elsewhere. These employees lacked the flexibility to walk across the street, so to speak, and get another job with a different company.

This situation was especially true for employees who were somewhat more advanced in age and, as a result, perceived themselves to be even less attractive to

potential employers. Several employees like Guy, after having taken stock of what they had to offer another employer, came to the conclusion that their chances of securing employment elsewhere were very slim and, for this reason, did not refuse to relocate.

I could have refused the relocation...but I didn't know if I was going to get another position elsewhere because I didn't go to college. I've got a high school education. That's it. I started working when I was 17 years old, therefore, I don't have a diploma, that piece of paper that indicates what I'm capable of doing. I've been working for [name of company] since 1974. I was 21 years old when I started there, my previous jobs were not any good, and the skills I have are strictly related to my field. It's not like I'm into computers and can walk across the street to the Toronto Dominion Bank and get a job just like that. Therefore, if I had been obliged to quit the company, it would've been very difficult for me to find another job. Especially someone who's 42-43 years old, no diploma, no applicable skills. I think it would've been very difficult.

Although these human capital factors applied to both Québec and Ontario employees, some anglophone Québécois were further limited in terms of their human capital by virtue of being unilingual. One of the biggest push factors out of Québec for many English-speaking Québécois was their inability to speak French. In addition to the human capital factors just discussed, Québec employees who had no knowledge of French knew they were at an even greater loss in terms of job prospects in Québec than those who were bilingual. Unlike their bilingual counterparts who were more marketable as a result of knowing both languages, their unilingualism posed a serious impediment to securing any type of employment in Québec. Consequently, for some employees, accepting the relocation was their only option.

#### ***Destination Antecedents***

Finally, it is critical to mention that when deciding whether they should relocate to Calgary or stay behind in Ontario or Québec, employees also considered the

destination of relocation. Although for certain employees the destination had no bearing on their decision to relocate, the majority did speculate about the relocation in relation to the city and province to which they were being asked to move. The fact that they were being relocated to Calgary as opposed to any other city certainly had a positive influence on a great number of employees. Ontarians, in particular, were quite adamant about the fact that they would not have relocated just anywhere. Calgary seemed to be an ideal place to move to for a variety of reasons. Unlike Ontario and, more specifically Toronto, Calgary was a much newer city, smaller in size, less congested, less expensive, and within close proximity to the mountains and national parks like Banff and Jasper. With the exception of a few individuals who had actually spent a reasonable length of time in Calgary (usually for pleasure) prior to being asked to relocate, most employees from Ontario who had been to Calgary previously had come only for business reasons and, therefore, were not all that familiar with the larger city. They were aware of the fact that Calgary was booming, however, and through talking to colleagues and reading about Calgary, they knew that it was also a more affordable place to live because houses were cheaper, gasoline was less expensive, income tax was lower, and there was no provincial sales tax. They also knew that Calgary was an “easier” place to live in that it was a safer city, more “laid back” than Toronto, and as they were often told, “a great place to raise kids”.

Irrespective of Calgary’s climate - which they were told was much colder than Ontario’s - and in spite of certain stereotypical perceptions employees may have had about Calgary as some “hick town” with cowboys, Indians, and “rednecks”, the city of

Calgary was an attractive destination for most of Ontarians who relocated. For some, particularly those who were looking for a change in life-style and were thinking of starting a family, the pull to move to Calgary for the reasons just cited was so strong that it facilitated their decision to move. For Gregory, the fact that Calgary was the destination of relocation made his decision to relocate very easy.

When they said Calgary, I was like, "oh, yeah!"... Close to the Rockies, good mountain biking, lower taxes, great... 'cause I think the company was hesitating between Vancouver, Calgary, Montréal, and Winnipeg... And, there's the fact that I was starting to not feel safe in Toronto. Three corner stores by my house were hit by armed robberies and I'm in a relatively nice part of Toronto, Bloor West Village. I was bike jacked one summer... Why would I want to raise a child in this. So that was a source of conflict between my wife and I, where she wanted kids, and I'm like, "I don't want to have kids, not in Toronto". That was an ongoing conflict so when the opportunity to move to Calgary came up, I was like "yes, please sign me up!". Had it been any other city like Vancouver, I don't think I would have relocated because Van's just as dangerous and expensive as T-O, Montréal was impossible because of the French, and Winnipeg...well, I had no real desire to go there.

Employees from Québec felt more or less the same about Calgary as their counterparts from Ontario. They, too, were receptive to the idea of Calgary as the relocation destination primarily because of its thriving economy and because it was close to the mountains. In addition, the fact that Alberta was not as politically charged as Québec was another feather in Calgary's metaphorical cap. Both French and English-speaking Québécois found the idea of relocating to Calgary very refreshing for that reason alone.

Moreover, as concerned as some of them may have been about the idea of moving to a completely anglophone environment, the majority of French-speaking Québécois with relatively young children looked upon moving to Calgary not only as an occasion to

discover the western part of the country but, more importantly, as an opportunity for their children to learn English. Although many Québécois employees perceived this as a bonus to relocating, for it would open many doors for their children as far as job and life opportunities are concerned, some actually accepted to relocate solely or primarily for that reason. As many employees like Olivier made clear, their children's bilingualism was the major impetus behind their accepting the relocation offer.

I would say that my primary motivation for accepting the transfer was that my daughter was going to become bilingual. That counted for a lot. I wanted at all cost for her to be bilingual and she tried in Québec. God, how she tried! She took a 6-month intensive course in English at school and she didn't learn a thing. It was a total waste. It was a joke and I was so disappointed. I thought she would never become bilingual in Ste. Thérèse where we lived because it was a completely French area. By coming to Calgary she would at least become bilingual...That was crucial for me because I know what it's like to not be able to speak English. At 18 years old, I would have liked to be bilingual. At 18, I was a unilingual francophone Québécois and I didn't want that to happen to her, too.

For as much as they liked the idea of moving to Calgary for the reasons just discussed, Québécois employees were just as equally concerned about how they and especially their children were going to be received by Calgarians. Although this did not deter them in any way from accepting the move, they did give some thought to whether their presence in Calgary would be welcomed. Like Ontarians, Québécois also had certain perceptions about Calgary as being very conservative, and somewhat "redneck". However, unlike people from Ontario who were largely unaffected by these perceptions, Québécois were concerned about the extent to which these perceptions, if true, were going to touch them personally. Both francophone and anglophone Québécois feared that perhaps as a result of the political strife between Québec and English Canada, they would

be rejected by Albertan society by virtue of being Québécois. Nathalie, who accompanied her husband when he relocated with his company in 1991, expressed her concerns in the following manner:

I was personally afraid of having some anti-French reactions. I mean you figure, hell I'm sick of all the politics in Québec, sick of all the complaining, and I'm French and I'm from here. Imagine English people outside Québec? How do you think they must feel? Then you read the papers in Québec and I find that they give an impression that Calgarians are very conservative, they don't like bilingualism, they hate the idea that Québec has special privileges, and they're tired of the fact that Québec is never satisfied. What with Preston Manning and the Reform Party out there...So I was a little scared, you know, being from Québec and being francophone and all that...

#### Perception of Control and the Negotiating Process

This being said, although employees and their partners considered all of these factors when deciding whether to move to Calgary or refuse the offer and stay behind in Ontario or Québec, the manner in which they arrived at their decision to relocate differed depending on their perception of control over the move. More specifically, those employees who perceived themselves as having more control over the move, felt less pressured to relocate. Consequently, they entered the negotiating process with a clarity of mind and a positive attitude. When deciding whether to move, they acknowledged and considered every factor from what I called an 'additive' standpoint - meaning, they negotiated the move in terms of the added value or benefit it would bring to their lives. To this end, employees centered their decision-making efforts primarily on how the move was going to enhance their professional and/or personal lives. As one employee so aptly put it:

They never told me, "you have to move!". They never gave me an ultimatum. They always kept an open door for me. If I wanted to stay in Montréal, they would have kept me there but I wouldn't have had the Director position in Montréal because it was coming here. That I knew right off the bat. So I didn't have a gun to my head. I knew I could have stayed there if I wanted... I was in full control of my situation. I asked myself, "is it worth it to move, or not?". If it isn't, well then good-bye I'm off somewhere else to do something else. If it is, then I was going to dive right in and have some fun while doing it. For me it was worth it, obviously, or I wouldn't be here.

Employees who approached the negotiating process from this additive standpoint concentrated on certain factors more than others. Although they paid heed to the political and economic contexts from which they came, they did not dwell on these factors but instead focused more on the organizational, human capital, and destination factors. These employees were generally content and secure in the skills they possessed and their employment conditions and, therefore, did not give much thought to the structural constraints imposed by their immediate surroundings. Although they were not oblivious to the political and economic contexts of their environment, these factors did not affect them personally and, as a result, they did not exert much influence in the decision-making process. Instead, employees placed emphasis on those factors that affected them at a professional and personal level and that were liable to add value to their lives.

Their decision to relocate ultimately rested on one or a combination of the following reasons: (1) the promotion they were offered or the advancement opportunities that would invariably arise as a result of the move (organizational factors) would provide them with a higher salary and add value to their professional status; (2) their new position or the opportunity to work in the new headquarters location would provide opportunities to appropriate new skills which, in turn, would increase their human capital investment

and render them more marketable to potential future employers (human capital factors); and (3) the value added to their personal lives by allowing them to either embark on an adventure, discover something new, make a new start, or simply offer their children an occasion to experience a different culture and learn another language (destination factors). Their decision to relocate, therefore, was usually viewed as being good for their career or personal growth and, as such, they did not feel the need to rationalize or justify the move.

By comparison, those who perceived to have less control over the move felt they had no recourse or alternate course of action at their disposal. Faced with the alternative of being without a job, employees in this position felt an enormous sense of pressure to move. As a result, they entered the negotiating process feeling particularly vulnerable and insecure about their future. Their main concern was to protect and maintain their existing conditions (i.e., their job, home, standard of living) and, to this end, approached the negotiating process not from an additive perspective but more from what I refer to as a 'preservative' standpoint. Those employees, in other words, were more preoccupied with safeguarding what they had instead of supplementing it.

Unlike their counterparts who barely considered the societal context from which they came when making their decision to relocate, employees who perceived themselves to have no or little control over the move devoted a considerable amount of thought and reflection to their surroundings. Perhaps as a result of their lack of control over the move, these employees were acutely aware of and, to a certain extent, sensitized to what was happening around them. While they were in the security of their jobs, the rising rate of unemployment or the scarcity of jobs or the political instability of their region did not

preoccupy them as such. However, given the imminence of being without that safety net, these societal issues assumed a greater significance. For these employees, the political and economic factors discussed earlier largely influenced their decision to relocate.

Moreover, employees who approached the negotiating process from this preservative standpoint also focused their decision-making on work-related factors such as organizational and human capital factors. Instead of addressing those factors in terms of how the move could potentially improve or add to them, however, these employees regarded those factors as an impetus to make the move. The majority of these employees were either young and just beginning their careers without much experience or they were at the tail end of their careers, after having invested many years in the company, with skills that were largely industry specific. In other words, many of these employees did not have the human capital required to confidently walk out of their jobs and immediately step into another job. Consequently, they were more dependent on their jobs and, therefore less free to refuse the relocation. As one employee stated:

I was five years shy of early retirement, I wasn't one of those young pups coming out of university with a degree in computer technology that could easily get a job anywhere else for the same salary. I had to be realistic given my circumstances. I was 55 years old, close to retirement, with very specific skills. If I lost this job, good luck finding another with the same pay and benefits. If I wanted to retire comfortably and actually carry on living the way I did, I had to follow my job. Securing what I've built up all my working life was my first priority.

Their decision to relocate was ultimately based on one fundamental reason: survival. After considering their political and economic contexts, and taking inventory of their human capital, these employees felt obliged to relocate in order to preserve what they had and continue providing for themselves and their family. Unlike some of their

colleagues, who felt no need to justify their move, these employees rationalized their decision to move as one of subsistence. Although they rationalized the move as such, they did attempt to focus on some of the positive aspects of relocating to Calgary (e.g., destination factors) such as the opportunity to discover Western Canada and be exposed to a different culture, make a new start, provide their children with an opportunity to learn a new language, among other things. For these employees, focusing on some of these additive aspects of moving was a way of reclaiming at least some control over the move.

As one employee from Québec pointed out:

On the flip side of the coin, we said to ourselves, "we're going, I'm still working, I managed to protect my pension etc...all my investments in the company. Maybe it won't be so bad. The kids will be bilingual, we'll see another country that we always dreamed of seeing, OK let's go!".

Perception of control, however, came in varying degrees, ranging from little or no control to some control to full control over the move. For instance, a couple of employees who were provided with options relative to the move may have had some perception of control. However, because they were older in age and close to retirement or because they devoted several years to the company and did not possess the transferable skills necessary to secure employment elsewhere, they did not perceive themselves to be in full control of the move. Consequently, they did not approach the negotiation process entirely from an additive standpoint but more from a preservative perspective. As a result of their age, company tenure, and limited skill set, these employees were more concerned with preserving or maintaining their investment within the company than enriching their professional or personal lives. Employees who found themselves in this position, therefore, relocated primarily to protect what they had. Nonetheless, they rationalized the

move in terms of what they referred to as the “bonus” of relocating to Calgary by considering things such as being able to increase their savings because of the lower cost of living, being within close proximity to the mountains, and being in a more slow-paced, less congested environment, to name a few.

Employees who were given no options regarding the move but who had a certain degree of confidence in their skill set or were seeking career advancement opportunities or simply wanted to move to Calgary for a change of pace, also felt they had some degree of control over the move as a result. These employees negotiated the move not only from a preservative perspective but also in terms of the added value it would bring to their lives. Although they may have perceived themselves to have little choice but to move, the fact that the move would help them achieve their goals, whether they be professional or personal, gave them some sense of control over the move.

Having said this, in addition to the importance of perception of control in negotiating and rationalizing the move, another critical consideration for employees when deciding to move and over which they had absolutely no control was the ‘timing’ of the move. Timing is everything, especially when it involves making an important life change like relocation. Past research has often overlooked this issue of timing. However, as the following section will demonstrate, timing was critical for achieving what Nigel Nicholson (1987:180) referred to as a “state of readiness” for making the change.

Timing: Achieving a “State of Readiness”

The question of readiness, and whether one is ever really ready to undergo a major life change like relocating across the country, is debatable. Although people may never really know for sure if they are ready to make a change, they usually know with a fair degree of certainty when they are not ready to go through with one. Several employees admitted to being asked more than once by their employers to relocate and every other time refused because “the timing wasn’t right”. This is not to say that the timing was right for all those employees in this study who relocated. On the contrary, for some employees, the timing could not have been worse. These employees, for the most part, were at a stage in their lives where moving seemed to be out of the question. The majority had teenage children, which inevitably meant tearing them away from their school, their friends, their work, and their significant others. Some had partners who would have to give up fulfilling jobs and careers. Others had parents or in-laws who were in poor health, and relocating meant leaving them in the care of others. Still others had reached a certain point in their lives where they were quite comfortable being where they were: their homes were paid off, retirement was in the near future, their children were settled and starting families of their own.

For these employees, the offer to relocate could not have come at a more inconvenient time. For this reason, the entire anticipatory stage was, for many employees, a very stressful ordeal. It was stressful, in large part, because moving was not something they had planned on doing at that time in their lives. Those employees who experienced the most difficulty at this stage of the process were those whose children had refused to

relocate. Henri and his wife from Québec, for example, had a hard time accepting the move because it meant splitting up the family to do so.

Our son didn't come out with us. That was the most difficult thing we had to bear. He dropped out of college so that he could remain in Montréal because he now had to support himself. Therefore, the fact that our son stayed behind didn't help at all...The fact that our son quit his studies so that he could remain in Montréal instead of trying to work something out with us, you know, coming out to Calgary and trying it out here for a while...that's what burned us the most. We broke up our family as a result.

Nonetheless, for reasons discussed earlier, they agreed to the relocation despite the terrible timing. Were these employees ready to relocate? The answer would have to be no. Could they have done it differently? As one employee's wife succinctly pointed out, "when it comes down to putting bread on the table, you take all the blows that come with it because you don't have the luxury of doing otherwise".

The timing was not problematic for all employees, however. As a matter of fact, for several of them, the timing could not have been better. The move provided an occasion for some employees to get out of a professional or personal "rut" and experience something new. Others had no special inclination to look for another job and, given that their children were either too young to notice or too old to put up a fuss, thought "this is a good a time as any to move". Moreover, those employees who were in the process of undergoing a role transition at the time they were asked to relocate, welcomed the move with open arms. For instance, while some employees were coming out of a marriage or relationship and were looking for an occasion to make a fresh start, others were experiencing marital difficulties and looked upon the move as an opportunity to "get things back on track". Still others were contemplating starting a family and thought that

moving to a smaller and safer city like Calgary would be a good idea. Some employees had become empty-nesters and saw the move to Calgary as an opportunity to downsize and start a new life. The timing of the move for another employee like Elizabeth, who had been grappling with the death of her husband for the last five years, could not have been more perfect. As difficult as leaving Toronto would be, the move provided her with the opportunity to achieve some sense of closure and finally reclaim her own identity as a person separate from that of her husband.

...The thing that pushed me over the edge in the direction of coming was probably the idea of having a brand new start. The idea that I could sell the house that we had lived in for 23 years. Move out of what was, what my husband and I shared, and what we had built there. I was still struggling to be...to make life work with one half of the party missing kind of thing. And it didn't work at all. It really didn't. And I was into all kinds of activities and that sort of thing but it was a constant struggle. I constantly had to work at being in some way happy and I just felt that having a brand new start where people would meet me as an individual rather than knowing that I was now a widow. I don't know but people are strange. They can't deal with death. And so I wanted to go someplace where I would be an individual.

The timing of the move, therefore, is a critical component of the anticipatory stage, for it is the component of the anticipatory stage that bridges the negotiating process and what I have referred to as employees' 'perception of choice' to make the move. Like the issue of control, in the context of imperative societal constraints, choice - or, at least voluntary choice - is illusory. Although there was a semblance of choice in that employees had the option of moving or turning down the relocation and accepting the severance package in its place, their choice was made in light of various structural (i.e., political, economic, organizational) and individual (i.e., human capital) constraints. Thus, their choice to relocate was not a fully voluntary or 'free' choice but more a constrained

choice. Nonetheless, the timing of the move influenced employees' perception of choice to move so that the better the timing, the greater their perception of choice to move.

#### Perception of Choice: Definition of the Situation

Hence, depending on their definition of their situation, or circumstances, employees had differing perceptions of choice to relocate. Employees who came from a corporate context in which they had options available to them perceived themselves to have some sort of control over the move. This perception of control subsequently led them to approach the negotiating process from an additive standpoint whereby they deliberated the move in terms of the value it would add to their lives and, if the timing was right to make the move, these employees then felt they had the choice to relocate. Brianna, who relocated from Toronto with her company in 1996, was an example of this group of employees.

...The advantage I had, and that we had as a couple, is that I had options. We were lucky actually because not everybody did. But, um...they made it pretty clear to me that no matter what, they wanted to retain me as an employee if I still wanted to work for [name of company], and that they were willing to find me work, either with the Calgary move, or to stay behind and find work in Toronto...I also had an advantage because my skill set is sorta generic...so the offer felt very non-threatening, very open-ended...It was a good career move for me...and let's face it, the timing was perfect for my husband and I. He needed a change because his work wasn't going well in Toronto and we were looking for a life-style change...Needed to get out of Toronto because we were living in a rough neighborhood, and although that's trendy, fun, great when you're single, or just married with no kids, when kids come on the scene, the drugs, prostitutes, and social problems are not so good. We can handle it, kids shouldn't have to. So, did I have a choice to move to Calgary? I most certainly did.

On the other hand, employees who came from a corporate context in which they had no or very few options, subsequently felt like they had no control over the move. As a result, they entered the negotiating process riddled with uncertainties about their future and approached the decision to relocate from a preservative standpoint. Their only concern was to protect their jobs in order to survive. If, for whatever reason, the timing was wrong, these employees then felt constrained to move. When asked if he felt he had a choice to relocate with his company, Jean-Marc's response was the following:

For three months I didn't know if I was going to have a job or not. I was living in that kind of uncertainty for three months. When they finally told me I had a position, I was so relieved, even if it was a demotion. It was really about survival. We had to survive. She didn't work, I was 48 years old, with two young children, a mortgage, loans...I invested 27 years of my life in the company and I had a good pension. I couldn't lose all that... The timing couldn't have been worse...we had just dumped \$35,000 two years before we moved on the house and renovated it from A to Z, the girls were 10 and 12 and at that age the last thing they wanna do is move...but we had to. I had no choice. I couldn't refuse. I had a gun to my head and a knife to my throat and I wasn't holding either one of them!

Although Brianna and Jean-Marc were at opposite ends of the spectrum, the general pattern was the same for the majority of employees. Depending on employees' reasons for relocating and the timing of the relocation, their perception of choice varied accordingly so that some employees perceived they had more of a choice to relocate than others.

In sum, the anticipatory stage of the relocation process was, as its name implies, that period when employees and their families pondered the consequences of accepting or refusing the offer to relocate by negotiating as a family the pros and cons of leaving their region of origin and relocating to another part of the country. As this chapter revealed, the

corporate context from which employees came influenced employees' perception of control over the move so that employees who heard about their company's decision to relocate their headquarters directly from management and subsequently received non-selective offers to follow the company perceived themselves as having more control over the move than employees who heard about the move from a secondary source and received selective offers to move. Their perception of control, in turn, largely influenced the manner in which they negotiated their decision to move. Although they considered a number of factors when making their decision, employees who perceived themselves as having more control over the move negotiated their decision to relocate from an additive standpoint. In other words, they arrived at their decision on the basis of how the move would add to their lives. By contrast, employees who perceived themselves as having less control over the move negotiated their decision to relocate from a more preservative standpoint. These employees essentially agreed to the move as a means of preserving their job and the accrued benefits that came with it. The regional contexts from which employees originated also influenced the negotiating process in that employees from Québec gave more serious consideration to certain factors (e.g., political, economic, destination) when deciding whether to move than their Ontarian counterparts. Given that group moves are employer-initiated and, thus, are willed at the command of the company, the timing of the move, when combined with employees' perception of control over the move and their reasons for accepting the offer to relocate, had a significant impact on employees' perception of choice to move. In essence, the better the timing of the move, the greater the employees' perception of choice to move. Conversely, the worse the

timing of the move, the lesser the employees' perception of choice to relocate. As the next chapter will demonstrate, this perception of choice, in turn, affected the manner and extent to which employees and their families adjusted to their new environment.

**CHAPTER 6****GETTING SETTLED: ADJUSTING TO THE NEW ENVIRONMENT**

Once the decision to relocate to Calgary was finalized, employees and their families launched into the cumbersome process of selling their homes, packing their personal effects, buying or renting a home in Calgary, registering their children in new schools, and for the partner of the relocated employee, either making the appropriate arrangements for a job transfer to Calgary or scouring the Calgary job market for new employment. As far as the logistics of the physical move, employees and their families were satisfied and somewhat impressed with the assistance they received from their company. In all cases, employers incurred the legal and real-estate fees associated with buying, renting, and selling a home as well as the costs associated with the actual move (the packing, transportation, and unpacking of items). Some companies even supplemented this basic relocation package with incentives such as an all-expenses-paid jaunt to Calgary (for the twin purposes of providing employees and their families with an opportunity to procure a house or an apartment and “get a feel” for the city), a lump sum of money to cover the expenses of “incidentals” such as carpeting, light fixtures, and window dressings, and on-site family counselors, psychologists, and employment placement agents for employees and their families to consult over the course of the relocation process.

However, even under the best of conditions, the move was anything but simple for the employees and families in question. As with all moves, they took on the onerous task

of coordinating, scheduling, and monitoring the various appointments and chores surrounding the physical move such as meeting with realtors and prospective buyers, selling the house, and packing its contents. In addition, employees and, more often than not their partners, attended to the minutiae that accompany out-of-province moves such as the closing or transferring of bank accounts, the cancellation of drivers licenses, club memberships, newspaper/magazine subscriptions, as well as medicare and other insurance policies. While attending to what employees referred to as the “nuts and bolts” of relocating was tedious and stressful, what employees and their families found to be the most strenuous aspect of the move to Calgary was the severance of family ties. The thematic “good-bye and good luck” parties put on by family members and friends and the final farewell to dear friends and family at the airport or in the driveway prior to departure often were very emotional and difficult experiences. When asked about the most stressful aspect of the move to Calgary, Daryl echoed the sentiments of many others when he said:

The whole good-bye part was by far the toughest. Six months of saying good-bye to people in Québec, you know...the one last get together, one last barbeque, one last party...everything was one last something or other. That was a killer for me and my family.

These situations were particularly difficult for the person whose job was being relocated. In addition to feeling their own sense of loss at leaving behind family and friends, they felt a tremendous sense of guilt over the effect that the impending physical separation was having on their partners and children. As Brendan explained:

The hardest part was when we left my parent's house. Getting in the car to drive out to Calgary....Whew! That was tough....so tough. They were all

crying. That was hard on me. I was the heel again. We were moving because of MY job. The kids were young and they were crying, my mother was waving to us from the balcony crying her head off, my wife was crying, everybody was crying. I remember thinking to myself at that very moment, "oh, shit, I don't need this". That's probably the only thing. Like I said, the company moved us, they packed everything, they literally did everything, which was great. What the company didn't and couldn't do anything about short of not moving my job to Calgary was what turned out to be the toughest thing I had to go through - watching everybody cry. Nothing could have prepared me for that.

As difficult and as stressful as those moments leading up to the point of departure were on employees and their families, once they embarked on the plane or on the TransCanada highway heading west, many of them underwent an instantaneous psychological transformation. Feelings of sorrow and nostalgia for the old life they were leaving behind were quickly replaced by feelings of excitement and trepidation for the new life that lay ahead. Stressful though it was, the uncertainty and unpredictability that came with starting afresh in a foreign place gave them a sense of thrill, and euphoria soon set in as they came to view the move more as an "adventure" than a "nuisance".

#### Impressions of the New Environment

For the most part, employees' initial impressions of the city of Calgary were positive as they went about discovering what the new city had to offer, participating in various local events organized by their company, and venturing out to the mountains and the neighboring towns. In comparison to the older, more congested, and grayer cities of Montréal and Toronto, the newer, less encumbered, and bluer skies of Calgary were a welcoming change. The employees from Ontario were especially appreciative of the significantly shorter commute to work, albeit a little disappointed with what they viewed

to be an inferior system of public transportation. Québécois were most impressed with the city's infrastructure and expanse of "green space" but somewhat confounded by the meager distances between homes (particularly in the newer subdivisions). It was the mountains and Calgary's proximity to Banff, Jasper, and other national parks, however, that made Calgary particularly appealing for many employees.

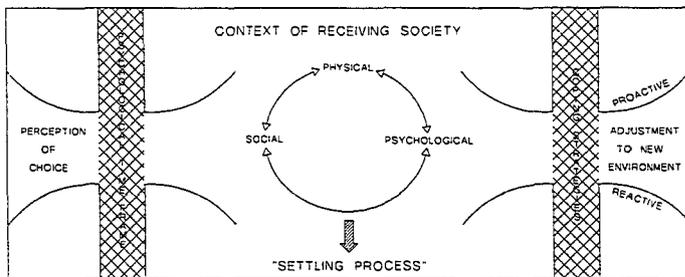
In addition to the topographical advantages of the city, relocatees relished the slightly lower cost of living as a result of Alberta's lower taxes, more affordable housing costs, and competitive gasoline prices. Relocated employees were smitten by the friendliness of Calgarians. Québécois', and particularly French-speaking Québécois' initial concerns about their reception in Western Canada were quickly put to rest as a number of them were pleasantly astounded and somewhat overwhelmed by the undue attention they received on a regular basis as a result of being French. Olivier, for instance, was taken aback by the lengths to which Calgarians went to make him and his family feel welcome.

Gosh, I couldn't believe how openly welcoming Calgarians were to us Québécois. I don't think they were as welcoming to people who moved here from Ontario, Manitoba, etc...because they were simply cousins, you know? But us...we were different. We were guests...I think they're very curious about us. They always want to talk to us. We would go to restaurants and the waiters and waitresses would sometimes spend up to 45 minutes talking with us. They weren't working but they sure wanted to know things because they read so much stuff about Québec. They asked all kinds of questions. If I go to a store to buy something and I pay with my credit card, you can be sure, and this never fails, that as soon as they read my name and realize it's a French name, they ask the question. They just have to ask, "are you from Québec?". They then start asking all kinds of questions and try pronouncing my name. There can be 10 people in line behind me and they won't care. It's really something else. We intrigue them for some reason....that's right, we intrigue them.

As favorable as their impressions of Calgary were, the euphoric feeling that came with being in a new city waned as the majority of employees and their families began to settle into the routine of day-to-day living in an unfamiliar city, surrounded by complete strangers, and faced the daunting task of familiarizing themselves with all aspects of their new environment. It is this second stage in the relocation process which immediately follows what employees referred to as the "honeymoon period" - or that period between the point of departure and approximately three weeks after departure - to which we will now turn.

While the central task of the anticipatory stage, as mentioned in the preceding chapter, was to come to terms with the move and achieve a state of psychological readiness to make the move, the primary task of the second stage of relocation - which I call the 'familiarization stage' - is to achieve a certain degree of adaptation or adjustment to the new environment. The 'familiarization stage' of relocation is a combination of Nicholson's (1987) "encounter" and "adjustment" stages in his analysis of the transition cycle, where the former focuses exclusively on that precise moment when one comes face-to-face with the change (in this case, the moment of arrival at the new destination) and the latter examines the manner in which individuals, through self-development, role innovation, and relationship-building, achieve a congruous relationship between themselves and their environment (Nicholson, 1987: 181). For the purposes of this research, the encounter and adjustment stages have been combined. Upon arriving in Calgary, everyone in the sample reported a honeymoon period varying from a few days to as long as six months, with an average of two to three weeks. However, their process of

**Figure 2: Stages in the Relocation Process**  
*Stage Two: The Familiarization Stage*



adjustment differed significantly as a result of their experiences in the preceding, or anticipatory, stage of relocation.

Stage Two: The Familiarization Stage

Demonstrating the interdependence of the stages of the process of relocation, once the thrill and excitement of the honeymoon period abated, the manner in which the 'settling process' unfolded was conditional upon the degree to which employees and their families perceived they had a choice to relocate to Calgary. Employees' perception of choice to move, therefore, signaled both the culmination of the anticipatory stage and the beginning of the familiarization stage. Regardless of the degree of choice that employees felt they had over their moves and their perceived readiness to deal with change, the

felt they had over their moves and their perceived readiness to deal with change, the move to Calgary inevitably brought new and unforeseen experiences. The manner in which these experiences were handled in the settling process, as well as the coping strategies they employed to facilitate adjustment to their new environment were largely dependent on what I refer to as their 'psychological time frame'. Figure 2 is a diagrammatic representation of the way the various components of the familiarization stage are linked, and the remainder of this chapter will elaborate the mechanisms underlying each of these components.

#### Psychological Time Frame of Relocated Employees:

##### A Typology of Relocatees

One of the distinguishing features of group moves in relation to individual transfers is the provision in most relocation agreements of what employees call the "return-policy insurance". Companies who move groups of people to a new location often provide a fully-paid relocation back to the original destination area provided the request to return is made within a specified time frame. All companies in this study provided employees with the opportunity to return for whatever reason to their province of origin (without a job, of course) within two or three years of their departure date at the company's expense. While this stipulation in the relocation agreement had the desired effect of assuaging those employees and families who feared the worst possible scenario - disliking Calgary to the point of being unable to adapt to the new destination - the clause

as such did not encourage reluctant employees to accept the relocation to Calgary for the specified duration and then return.

This is not to say, however, that those who relocated to Calgary all came with the intention to stay. On the contrary, employees arrived in Calgary with a definitive idea regarding the length of time in which they were intending to remain in the new destination (only one couple reconsidered their plans over time). Hence, depending on their predetermined length of stay upon arrival, the relocatees in this sample could be classified as one of four types: (1) permanent; (2) purposive; (3) flexible; or (4) transient. The 'permanent' relocatees were those employees who moved to Calgary with the intention of remaining in the new area of destination on a permanent basis. These employees, in other words, had no intention of returning to their province of origin or relocating elsewhere. The 'purposive' relocatees are best characterized as those employees who relocated to Calgary for a specific purpose and, hence, a specific duration (i.e., usually until they qualified for early retirement), and who planned to return to their province of origin immediately upon completion of that goal. By contrast, the 'flexible' relocatees were those employees who moved to Calgary with a more casual, "let's go to Calgary and then we'll see" attitude. These employees were more prone to giving the new destination a fair try, assessing their circumstances at some later point in time, and making subsequent decisions about future plans on that basis. These future plans could include returning to their province of origin, remaining in Calgary, or moving to a new location altogether. Unlike the permanent relocatees, the 'transient' relocatees are those employees who moved to Calgary temporarily, with the intention of then moving

elsewhere as opposed to returning to their province of origin. In other words, these employees were in transit and moving to Calgary was a stepping stone to moving to another location.

As demonstrated in Figure 2, the influence of employees' perception of choice to move to Calgary carried over into the second stage of relocation and funneled into the first component of the familiarization stage or employees' psychological time frame. The data reveal discernible patterns for those employees who perceived they had the choice to relocate from those employees who perceived to have no such choice. Those employees from both Québec and Ontario who perceived they had a choice to relocate to Calgary consisted predominantly of 'flexible' relocatees, followed by a significant number of 'permanent' relocatees. There were few 'purposive' relocatees among those who perceived to have a choice to relocate and even fewer 'transient' relocatees<sup>6</sup>. By contrast, of those employees who did not perceive to have a choice or who perceived to have little choice to move, the overwhelming majority were 'purposive' relocatees, followed by a small number of 'flexible' relocatees and an even smaller number of 'permanent' relocatees. There were no 'transient' relocatees among those who perceived to have no or very little choice to relocate.

At an intuitive level, these results are not surprising for we would expect that those who perceived they had a choice to relocate to a new destination would feel more in control of their career and their lives and, as a result, would approach the move with a more open mind and make future decisions about where to work and live in light of their current circumstances. By the same token, we would expect those employees who

perceived they had no or very little choice to move to Calgary to reclaim some control over their lives by moving to a new destination with a set plan to work for so many years and then return to the destination from which they had no intention of leaving in the first place.

While these patterns in the data between those employees who perceived a choice to relocate and those who did not reveal interesting results, the discrepancies between the Québec and Ontario samples and, to a large extent, between the French-speaking Québécois employees and their English-speaking counterparts in Québec, illuminate the regional and cultural dynamics that exist in this country. Although the Québec and Ontario samples displayed similar patterns among those who perceived a choice to relocate in that the majority in both samples were 'flexible' relocatees, differences were detected in the distribution of French-speaking Québécois employees and English-speaking employees from both Québec and Ontario across the 'purposive' and 'permanent' categories. Francophone employees from Québec were more than two times more likely to be classified among the 'purposive' relocatees and two times less likely to be found among the 'permanent' relocatees than their anglophone counterparts in both Québec and Ontario. In other words, irrespective of the fact that they perceived they had a choice to relocate to Calgary, very few Québécois planned on permanently establishing themselves in Calgary and more of them saw their move as a temporary change. Given the cultural differences that exist between Québec and Western Canada - language being the most obvious - this finding is not surprising. Moreover, the fact that almost as many English Québécois as Ontarians viewed their move as permanent rather than temporary is

largely attributable to a significant number of English Québecers embracing the relocation as an opportunity to liberate themselves from the political encroachment of Québec.

A similar pattern was detected among those who did not perceive a choice to relocate. Although the majority of employees were 'purposive' relocatees, Québec francophones dominated and were found exclusively in that category, whereas their anglophone counterparts in Québec were just as likely to be 'purposive' relocatees as they were to be 'permanent' relocatees and 'flexible' relocatees.

Overall, the significance of employees' psychological time frame, therefore, is that in addition to being the component of the relocation process that links the first and second stages of relocation, it serves to filter those employees entering the 'settling process'. As the following section will demonstrate, employees settled into their new environments in varying degrees as a result of their self-imposed psychological time clocks.

#### "This Is It, We're Here to Stay": The Settling Process

Whereas the negotiating process in the anticipatory stage of relocation took place within the regional contexts of Québec and Ontario, the settling process in the second stage of relocation took place within the context of the host or receiving society as employees and their families set about getting settled in a new home and city. The duration of the 'settling process' varied from one month to five years, with employees and their families requiring, on average, two years to settle into their new lives. In

general, the process was long and stressful for three reasons. First, the settling process is multifaceted and, therefore, employees and their families are not just settling physically in their new environment, but psychologically and socially as well. Second, the settling process does not unfold in a linear or sequential fashion but rather in a simultaneous and dialectical manner with physical settlement influencing and, in turn, being influenced by psychological and social settlement etc..., hence, the depiction in Figure 2 of the settling process as a circular process (indicating simultaneity), with double-headed arrows (indicating its dialectic or interactive nature). Third, the settling process is usually but not always exclusively in response to the relocation event. For example, in addition to having relocated to Calgary which in itself constitutes a major life change, some employees underwent a role change at the same time. This concurrent role change was in some cases planned before the move and in other cases unplanned.

For several employees, the relocation coincided with a significant life-altering event occurring in their personal lives such as a separation or divorce, the birth of a child, the loss of a partner, entry into the empty-nest stage of the life course, or a combination of these events. The stress brought on by relocation, therefore, was compounded by the stress of adjusting to singlehood, parenthood, widowhood, and/or a house void of children. For some of the partners of relocated employees, becoming gainfully unemployed (whether out of choice or not) following the move to Calgary rendered the settling process all the more stressful.

Given that stress is additive, for some individuals, it was difficult to ascertain the degree of stress associated uniquely with the job relocation. Nevertheless, the settling

process comprised of physical, psychological, and social components, all of which were influenced by the employees' psychological time frame.

#### ***Physical Settlement***

Of the three components of the settling process, physical settlement - establishing a home - was by far the easiest and quickest to accomplish. This aspect included setting up one's house or apartment, placing household items in their proper place, decorating one's living area, and turning what was once just a set of rooms into a more personal living space. Although labor intensive, settling in physically was not as emotionally taxing on employees and their families as settling in psychologically and socially. Fumbling through boxes, moving things around, and placing objects in their proper place kept employees and their partners physically occupied with little time for wistful yearnings for the old life they left behind. For this reason, physical settlement was easy and, as a result, required little time. Bernice, who accompanied her husband Nigel in his transfer from Toronto to Calgary, explained settling into her new home in the following manner:

Settling into the house was a no-brainer. We were really busy painting this, fixing that, replacing this, buying that, moving this here, putting that there. We didn't stop for nearly two weeks. It was just go-go-go, non-stop. That was great in a way because we didn't have time to think, you know what I mean? We didn't have the time or the energy to miss what we left behind in Toronto - our old house, our family and friends, our way of life there. As they say, idle hands make the mind wander. Well, our hands were very busy and I guess that's why we didn't think about it.

Although going through the motions of setting up one's home distracted employees and their families from thinking about the lives they left behind, these thoughts did influence the manner and extent to which they settled in their new

environments. More specifically, employees' psychological time frame had a significant impact on the degree to which they and their families physically settled in Calgary. Permanent and flexible relocatees, for instance, went about and attained different levels of physical settlement than purposive relocatees. Given that these employees had moved to Calgary with the intention of remaining permanently or, at the very least, staying as long as it suited them, they went about settling into their homes with those intentions in mind. Several bought their "dream home", not simply because it was more affordable but, more importantly, because they planned on "staying in Calgary a long time". They then proceeded to renovate, decorate, and furnish their homes to their liking. Some couples even attempted to replicate the home they had in their former location by purchasing a similar house in Calgary and then adding certain features (i.e., fireplace, alcove, solarium) in order to "recreate that homey feeling they had in their last home". They also painted their walls, arranged their furniture, and landscaped their home in a comparable manner for the same purpose. These actions on the part of permanent and flexible relocatees, irrespective of their regional origins, had the desired effect of making them feel "more at home" and, as a result, "more settled in Calgary".

By comparison, purposive relocatees felt more "like strangers in their own home" largely as a result of what they did or failed to do during the physical settlement process. Unlike their permanent and flexible counterparts, these employees moved to Calgary with the intention of remaining temporarily and, therefore, purposely refrained from "settling completely". Some of them chose to rent as opposed to buying a home in Calgary, to avoid the "hassle" of trying to sell a house that they were not planning on staying in for

long. Others bought a house that was not necessarily the type of house they liked but one which they could easily resell in a couple of years with minimal financial difficulty. Frédéric and Manon, a couple from Québec who moved to Calgary with the intention of staying only temporarily, explained the logic behind the purchase of their house as follows:

It's not the house we wanted. We told ourselves we were going to buy a house that we could sell relatively quickly. In our head, we weren't staying in Calgary for more than five years and that was clear from the very start...Had we come to Calgary with the goal of permanently settling here, it's probably not the house we would have chosen. We bought this house because we knew we wouldn't have any problems selling it because of the neighborhood it's in. Also, the size of the house is one that lends itself to being sold easily - it's not too big but not too small, either. We weren't going to buy a big house and then risk the economy dropping like in Québec. I remember telling Manon that if we bought a house that dropped in value, it wasn't the company that would make up the difference because if we were leaving in five years, we were going to be on our own. Therefore, I would rather lose 10% on a \$170,000 home than 10% on a \$250,000 home.

Still others never completely settled in, not so much because of what they did but more because of what they did not do. For example, several purposive relocatees did not sell their homes in Québec and Ontario so that upon their return to their province of origin, they would have "a home to go to". Other employees sold their homes prior to moving but failed to invest any time, effort, or money in renovating or personalizing their new homes in Calgary. Ronald from Toronto, for instance, had a penchant for gardening and was especially proud of his horticultural talents, yet he never so much as planted a seed in Calgary.

It's quite funny now that I stop and think about it. I guess I didn't settle into a life here because maybe subconsciously I really didn't want to. I never thought about the gardening thing all that much but it's true. I mean

I love gardening. It's really relaxing and I just get so much satisfaction out of doing it. God knows I did a lot of it in Ontario. My wife actually asked me several times why I stopped gardening since we moved and every time I thought of going outside and planting a few flowers, I changed my mind. We weren't going to be here very long so what's the use of having this beautiful garden in your backyard when you won't be around to enjoy it?

Ronald's reference to gardening in the above example in essence addresses metaphorically the attitude with which purposive relocatees approached their settlement in Calgary. As gardening entails the planting of seeds, getting settled in a new environment involves the establishing of roots. And like gardens need tending to yield bountiful plants, settlement requires due diligence to achieve a sense of "home". Hence, if you reap what you sow, the fact that purposive relocatees never really felt at home in Calgary is in part reflective of the fact that they never really settled in the first place.

#### ***Psychological Settlement***

While physical settlement was the easiest and quickest to accomplish, psychological settlement, by comparison, was the longest and most difficult to achieve. Psychological settlement consists of making peace with the move in one's mind. As part of the settling process, employees, their partners, and their children had to come to terms with and accept the relocation. Acknowledging the move as a corporate initiative masterminded by a board of directors was simple and straightforward for most families who understood only too well the reality of the corporate world. Even the most reluctant relocatees conceded that the relocation of their company's headquarter functions to Calgary made "good business sense". As one employee explained:

Corporate culture has changed and I think everybody understands that nowadays. You have to because that's just the way it is now. I think it's pretty much ummm...a general sensation because employment

relationships are different now. Long gone are the cradle-to-grave organizations. That used to be the norm back when I started working for the company but it's no longer the norm. The word of the day nowadays is 'reorg'. And it's not just this company. Most companies, from your local company to international conglomerates, reorganize the internal structure of their companies to remain competitive at both a national and global level. It's just the way it is. Can you blame the company for wanting to remain competitive? No, you can't. The company's got to do whatever it has to do to stay on top. Relocating to Calgary was a strategic move on the part of the company for a number of reasons. The clientele was western-based, it would be closer to the Pacific rim, and the company would be saving millions just on corporate taxes alone. If I were the CEO of the company, I would have made the same decision.

Although understanding and accepting the company's motivations for relocating was relatively straightforward, coming to terms with the consequences of the move was anything but simple. Among the many losses incurred by the move, the one that proved the most difficult to reconcile for employees and their families was the severance of close and meaningful ties. Adjusting to the fact that they were in Calgary and family and friends were "back home" was a painful "reality check". This pain was particularly acute in the weeks and months following physical settlement. Once their personal belongings were unpacked, their home was in functional order, and thoughts about their newfound situation gradually surfaced, they were seized by an overwhelming sense of isolation. As a result, everything from the most trivial to the most significant matters were amplified and gradually became cast in a negative light. What was once a manageable distance between them and their family members and friends, became an unbridgeable gap as employees and their families anguished over the fact that they were missing annual birthdays and anniversaries, weekly dinners and hockey games, and the occasional spontaneous outing with family and friends.

*Mourning the Losses of Relocation*

The partners of relocated employees had an especially difficult time settling psychologically into their new environments and thereby influencing the psychological settlement of employees. This was particularly true if relocation entailed the loss of the partner's employment. Unlike the relocated employees who had a job to go to and who, in essence, resumed their work routines (albeit in a different office tower and city), their partners felt void of any continuity in their own lives. As a result, they lost touch with who they were and, in that sense, felt they sacrificed more in relocating to Calgary than their partners. For some, this period of psychological settlement was a "mourning period", where they mourned not only the loss of their jobs and their family, friends, and social networks, but the loss of their identity. Nathalie, who accompanied her husband when his job moved to Calgary, explains her distress during the settling process in the following manner:

I felt like I was in mourning for a couple of months after we got settled into the house. It was much easier for my husband than it was for me because he was moving with his job, his company, and with people he already knew from the company and he was coming to Calgary to continue in his job, work his way up the corporate ladder, and attain the professional goals he set out for himself. Me, I left my family, my friends, my job. My life was at a standstill, I became a mother for the first time, and I found myself isolated in a corner of the world that was completely foreign to me. It wasn't Saudi Arabia, I wasn't living in dismal conditions, but I had to mourn my losses nonetheless. I had to go through this mourning period and mourn the loss of my life back home. My husband would come home and find me crying. He tried to help and be supportive but he didn't understand....he couldn't understand. I was the one who lost the most in the process. I remember telling him, 'let me cry, let me cry...don't worry about it, I'll get over it in time...just let me heal'.

Time was a critical factor in dealing with their losses as they progressed through the various stages of mourning, the most significant of which were anger, depression, and finally acceptance of the move. Despite the fact that they moved for their partners' job, their anger was directed not at their partners or the company but more at themselves for the "way they were handling the move". They resented the predicament they were in but, more than that, they were upset with themselves for their feelings. They felt "weak" and "timid" for clinging to the past instead of moving towards the future, "ashamed" for wallowing in self-pity instead of taking remedial action, and "guilty" for being self-absorbed instead of being more supportive. Incapable of "getting out of the rut" they were in, some of them succumbed to their "fate" and eventually, for lack of a better alternative, came to accept the move.

Others moved from a state of anger to one of depression. For weeks and sometimes months, they cried incessantly for the lives they left behind, with the slightest reminders of people they knew, places they saw, or things they did in the past triggering a fresh set of tears. Their depressed state of mind also drove them to engage in what they deemed to be some rather bizarre behavior. While some described going as far as ensconcing themselves in their homes for months at a time to avoid running into people who may potentially inquire about their well-being, others admitted to contemplating and devising plans in their minds for running away. Rosalind, who relocated from Ontario with her husband who got transferred, recalled the worst point of her depressive state as the time she actually drove herself to the airport in the hopes of getting on a plane and never coming back.

I was treading water. I'd given up my job, I'd given up my community. I had no support network. I felt that I had nothing to look forward to. And my thoughts were continually with everyone back east. And I think if I could have hooked up with one other person who was doing the same thing, we could have had a sob-fest...So when I wasn't thinking about everyone back east, I would be fantasizing about getting on the TransCanada and driving home. I actually drove out to the airport one day. I found my way out to the airport. You have to realize I'd only been driving for a couple of years and I didn't know Calgary at all but I made my way out to the airport. I even stopped at an intersection and read my map again and held up traffic. I got to the airport and watched the planes taking off and was very tempted to buy a \$3,000 ticket at the Air Canada counter. In the end I didn't do it...I chickened out but at least I knew how to get to the airport for next time, in case I just couldn't take it anymore and had to escape.

In time, acceptance did follow their period of depression although, when asked to identify the manner in which the transition occurred, many were unable to do so. Recollection of the transition itself may have been fuzzy, however, they distinctly recalled the "turning point" at which their psychological recovery began. They described this turning point as some kind of switch going on in their brain, illuminating their path towards good mental health. For some, this turning point was the realization that they did not particularly want to go back east to visit family or friends because "there was nothing left to talk about". At that point, they became aware that they were moving in a completely different direction from those they left behind and gradually began to accept that reality. For others, the turning point was when they finally made reference to Calgary as "home" instead of Toronto or Montréal. This usually occurred during a visit back east when they found themselves missing Calgary and were looking forward to returning "home", or when they left the east and upon arrival to Calgary suddenly realized that they

were glad to be “home”. Their admission that Toronto or Montréal was no longer home but that Calgary was now home signaled the beginning of their acceptance of the move.

“Turning the Page” versus “Putting In Time”

While employees and their families encountered their share of problems during their psychological settlement, the manner in which they handled these difficulties and eventually came around to accepting the move was largely dependent on their attitudes. Employees came to Calgary with one of two attitudes: they were either going to “turn the page” and start a new chapter in their life or they were going to mark the page, “put in their time”, and one day go back and pick up from where they left off. These attitudes, in essence, stemmed from their psychological time frame where permanent and flexible relocatees were more likely to hold the former attitude and purposive relocatees the latter.

Given their respective attitudes, permanent and flexible relocatees eventually came to terms with and accepted the move to a greater degree than purposive relocatees, regardless of their regional origins. As painful as it was being separated from friends and family and starting anew in a foreign city, those who relocated with the intention of remaining permanently had a vested interest in settling in Calgary to the fullest extent. They were “in it for the long haul” and, as a result, they intentionally set about “making Calgary their home” by repressing as much as possible any thoughts of their “prior life” and focusing their physical, mental, and emotional energies on “starting over”. Hence, any problems encountered during their psychological settlement over time were resolved. Similarly, flexible relocatees left Ontario and Québec thinking they were going to “give Calgary their best shot” and, with that attitude, made a serious effort not to dwell on the

past but “make the best out of their stay in Calgary”. This being said, permanent and flexible relocatees approached their psychological settlement in the same way they did their physical settlement - with the implicit assumption that they were in Calgary to stay. In the same way they poured energy into turning what was once simply a house into a place they could call home, they tenaciously went through the process of adjusting to the idea that they were in Calgary to stay by relinquishing the past and embracing the future. Moreover, in an interactive fashion, the effect of feeling “settled” in Calgary at a physical level as a result of being in a home that they liked, surrounded by their personal things, facilitated their psychological settlement which, in turn, reinforced their feeling of being “settled”.

By contrast, purposive relocatees had a time clock built into their minds which prevented them from settling psychologically to any comparable degree. They referred to their stay in Calgary as a “visit” and themselves as “visitors”. In essence, these relocatees led a dual existence in Calgary - they were physically out West but mentally back East. Despite any semblance of a normal life, they went about their days somewhat catatonically, without putting any “heart and soul” into what they did. Instead of anticipating what lay ahead, they eagerly awaited the day of their return to the East. Consumed by thoughts of family, friends, activities, and “everything back home”, they literally “counted the days” until their next visit which, for some, was as often as six times a year. One employee who went back to Toronto every three months admitted to “living by a calendar”, ticking off the days until his next trip. This employee, and many

others like him, were literally “putting in time” in Calgary, waiting for the day when they could return permanently to Ontario or Québec.

We count the days between trips. When we come back from Toronto, my wife and I know that within two or three months we’re going back so...In the back of our minds is the idea that well, it’s June, we’re going back in August or September, so you’re sort of counting the days. So you try to have fun until it’s time to go back for a couple of weeks. Just got to live from one trip to the next.

By virtue of putting in time and living by a calendar, purposive relocatees essentially put their lives and that of their partners and children on hold. This prevented them from achieving any sense of peace with the move which, in turn, compromised their health, affected their personal relationships, and influenced their work. Peter, who reluctantly moved to Calgary, explained how putting his life on hold was likely the cause of his lethargy which he believes to have inevitably affected, among other things, his lifestyle and his performance at work.

My life’s on hold. Time is going by and we’re not doing anything here. All we’re doing is waiting for me to turn 55 so that I can get my early retirement and we can go back to the life we had in Ontario. But as my wife says and I guess she’s right, this is time we’re never gonna get back. And we’re just wasting it away. We fight about that a lot. I see it at work, too. I can’t concentrate like I used to be able to. I just can’t get into it. I’m tired all the time. I don’t have the incentive, the uhm drive, to really do an excellent job like I used to. I’ve lost something. My whole life is...I don’t know, I can’t really get into it. I’ve put on forty pounds. I’m not running like I used to. I used to run at lunch time all the time in Toronto. Like my life, I’m just not happy. Something’s wrong with my life and it’s affecting my job, it’s affecting my whole lifestyle. I’m not the person I used to be. I know I shouldn’t be here, my life is on hold which isn’t right. I have to do something to get my life back on track again. I’m not sure if I can wait for the company to kick me out.

The attitudes of purposive relocatees and their families exacerbated any problems they had during the period of psychological settlement. Instead of gradually “letting go of

the past” and coming to terms with the move, having “one foot in and one foot out the door” hindered their psychological progress. Just as they never really settled physically in Calgary, they likewise never really settled psychologically. In a catch-22 sort of way, failing to settle completely in their new environment heightened their sense of displacement which, in turn, discouraged them from making any further attempts at establishing themselves physically in Calgary.

#### *Social Settlement*

Like physical and psychological settlement, social settlement was an integral part of the settling process. By social settlement I mean getting one’s bearings and establishing some form of social network in the relocated area. People are necessarily social beings and, as such, meeting and forming meaningful social ties with people in one’s immediate environment is as fundamental to settling into a new area as setting up one’s home and making peace with the move in one’s mind. The severance of personal ties as a result of the move was, as I mentioned in the previous section, devastating for the majority of employees and their families. For Québécois in particular, this devastation was further compounded by feelings of social displacement as a result of the divergent cultures of Québec and Alberta. Consequently, social settlement posed as much of a challenge and took almost as much time to achieve as psychological settlement for a number of relocated families. Moreover, as was the case for physical and psychological settlement, the manner in which they faced these challenges and the extent to which they established themselves socially in their new environment was largely reflective of their psychological time frame.

"Strangers In Town"

Although the majority of employees and their partners had been to Calgary for business, pleasure, or a house-hunting trip prior to relocating to the city, it was not long after they moved and realized they were in Calgary to stay that they went from feeling like "visitors" to "strangers in town". Québécois in general, and French-speaking Québécois in particular, felt significantly "out of place" in Calgary. For the first couple of months, they, like their fellow Ontarians, were completely disoriented as they found their way around the city through trial and error. While it may have been only a question of time before it was possible to leave the house and get someplace without reading a map or asking for directions, Québécois' feelings of displacement ran a little deeper than simply "feeling lost" in a new city. Unlike those who moved from Ontario, Québécois found themselves in a culturally different milieu, surrounded by and living entirely in English on a daily basis. In essence, Québécois experienced a "culture shock" upon settling out west. Barbara, an anglophone woman from Québec, was one of many that was struck by the similitude between Calgary and most American cities as a result of the "Englishness" of Calgary.

I was so shocked to see that everything was so English here. Living in Québec you think everybody or everything is bilingual. You don't realize that Québec's the only place in Canada where everything is bilingual. Coming out here, everything seemed American to me. So when we came here, it was like 'oh, it's just like Plattsburg....it's English'. I didn't think Calgary in itself was very Americanized but it's just very English. There's a lack of French here and I guess that's why I think it's like the US.

French-speaking Québécois employees and their families felt especially like strangers because of their detectable French accents and their different mentality. On the

various occasions they spoke English in Québec, francophones paid little heed to their pronunciation of words because French was the dominant language and, thus, it was “normal” to speak English with a French accent. The opposite was true in Calgary and they became more self-conscious of their accents as a result. Moreover, unlike their anglophone counterparts, the Québécois were astounded and somewhat perturbed by the pervasive “Anglo-saxon mentality” that existed in Calgary. In light of their more liberal views on religion, politics, and social issues, many were taken aback by what they saw as the antiquated social values held and espoused by many Calgarians. For instance, the importance of organized religion in their lives and its fundamental role in the schools, as well as their conservative stance on government and the civic responsibilities of its constituents, their “redneck” or hard-line mentality *vis-à-vis* socio-political issues like bilingualism, multiculturalism, immigration, gun control, capital punishment, and their “prudish” and intolerant attitudes towards homosexuality, abortion, and sexual liberation were all, for many Québécois, reminiscent of the prevailing values in Québec during the “reign of Duplessis” prior to the 1960s, before the massive reform that changed the face of the province.

The noticeable accent and the divergent attitudes, coupled with the exclusivity of English, sensitized Québécois employees and their families to the fact that they no longer held majority status but rather had been relegated to minority status as a result of the move. Given the implications of living in a minority context, social settlement was more difficult for them than both their fellow English-speaking Québécois who, conversely, went from having a minority status in Québec to a majority status in Calgary, and those

who moved from Ontario who experienced no change in their status with the move. In addition to employing the use of English in their everyday interaction with people, francophone Québécois had to adjust to the fact that they could no longer receive mundane services in French or purchase ordinary things like French newspapers, magazines, or books “right off the rack”. They also had to learn to deal with the reality of the limited availability of French entertainment, whether it be in the form of movies, television shows and radio programs, or live theater, musical productions, and concerts. As a result, if they wanted a social life of any kind in Calgary, they basically had to come to terms with the fact that that they would have to “have one in English”.

While this adjustment was difficult for francophones who were relatively proficient in English, it was even more challenging for those who did not speak the language. Several partners of the francophone employees who relocated were unilingual and, as a result, social settlement for them was doubly difficult. The inability to speak English prevented them from “having a life in Calgary”. They could not do tasks as simple as going to the grocery store or the doctor on their own without their spouses present to effectuate or mediate any transaction. Unless they subscribed to French newspapers or books, they were deprived of reading material and, except for those rare occasions where French movies were being shown or a French show was in town, they could not take part in an active social life. In addition to being unable to do things in light of their language “handicap”, they also had to combat feelings of inadequacy, inferiority, despondency, and shame that arose as a result of their inability to “function in Calgary”. Vivianne, who moved from Montréal to Calgary with her husband, explained how her

inability to speak English was not only humiliating for her but stressful for her husband who suddenly had the added responsibility of “taking care of her”.

It was hell! I couldn't be of any assistance to my husband with things like calling the cable, telephone, and gas companies because I couldn't speak English. The phone would ring during the day when he was at work and I wouldn't answer it because I couldn't speak English. If the doorbell rang, I would run and hide to show that nobody was home. I didn't understand a thing so it was pointless for me to answer the phone or the door. It was a terrible handicap for me. It was humiliating, I was frustrated that I couldn't do anything for myself. We would walk into stores and I would have questions for the salespeople of course. Well, I couldn't ask them directly so I would turn to him and say, 'ask him this, ask her that'. It became really tiresome. I had a doctor's appointment, well he had to come with me. That's something English people didn't have to deal with...the humiliation. It was tough. I was very independent in Québec. I did my own thing. I moved to Calgary and all of a sudden I became a dependent of his. I was like an infant. I couldn't go anywhere or do anything without him. He had his own adjusting to do and on top of that he had to hold me by the hand.

Despite the challenges of learning a new language and becoming comfortable enough with that second language to function autonomously and derive some enjoyment from watching a movie or reading a novel in English, French-speaking employees and their families were not the only ones who had a difficult time settling socially in Calgary. With the exception of very few families who knew people in Calgary prior to relocating, many found the task of branching out from the family and meeting new people to be a little more challenging than they expected.

*“All In The Family”*

Upon relocating to Calgary and for a couple of months thereafter, most employees and their families did not preoccupy themselves with making new friends. Their time, for the most part, was taken up working, establishing their homes, learning their way around

the city, and exploring the various “tourist attractions” like Banff, the museum of paleontology in Drumheller, and Waterton National Park, to name a few. Given the fact that they were new to the city and did not know anybody, their socializing was typically “all in the family”. That is, relocated families spent practically all of their free time doing “things together as a family”. This practice represented a change from their previous socializing in Ontario or Québec when their time was occasionally spent doing things apart from the family like “golfing with the guys”, “going for coffee with the girls”, or “skiing with friends”.

For some families, the time they spent together was very therapeutic in that it helped them come to terms with the move as a family. This was especially true for children with siblings who, through their time spent together, provided one another with the social support they needed as they settled into a new life in Calgary. Ronald indicated that the settling process not only brought his family closer together, but the relationship that developed between his sons as a result got them through the ordeal of moving to a new city.

It was touch-and-go there for a while. I wasn't sure they were going to make it here. I mean we're talking about teenage boys having to leave their buddies and social activities behind and move to a new place and start from scratch. I pulled one of them out a year before they were going to graduate from high school with friends they'd been with since elementary school. My other son was in the football team at school and at the prime of his game. It was brutal. They sulked and sulked when we moved here. But then we became this little nuclear family. We came here and we just sorta huddled together. And the boys, I mean they're really good friends. They did a lot of stuff together and you know, I think that's what saved them really. It was having their siblings.

While the time spent in each other's company brought some families closer together, over time the situation became somewhat "claustrophobic" as employees, their partners, and children felt the need to do things without necessarily involving a family member. The desire to "hang out with people of the same age" grew as they realized they were not going home but were in Calgary to stay. The inclination to make friends was there, however, some had an easier time than others because of differences in personality, family status, or both. Those who had "outgoing" and convivial personalities were more successful at developing friendships than those who were withdrawn and shy. Also, employees with young children had an easier time making friends than employees with no children, teenage children, and empty-nesters because the opportunities to meet and subsequently become friends with the parents of other young children were available. Through their children, several employees and their partners met their friends at day-care centers, various school functions, and sports-related activities. Although having a congenial personality and the right opportunities undoubtedly helped people build a social network in Calgary, the relocation itself - by virtue of being a group move as opposed to an individual transfer - facilitated the creation of social relationships. Essentially, the move provided employees and their families with an instantaneous network of people who, like themselves, were alone in a new city. Using this ready-made network as either a means in itself or a basis from which to start building meaningful relationships, employees and their families created new networks over a period of several months and sometimes years.

*"Breaking The Ice"*

Employees and their families may have been left to their own devices when it came to settling physically and psychologically in the relocated area, however, when it came to settling socially, several companies in this study intervened by organizing various "encounters" between employees and families. This support was extended, in part, because it was more feasible than helping families settle in physically and psychologically. More importantly, however, these encounters were arranged as a preventative measure to guard against any potential requests by employees to return to Ontario or Québec as a result of their inability to settle in the city. Unlike individual transfers, group moves involved a lot of people and, hence, were considered a great capital risk. Consequently, in an effort to minimize the chances of employees cashing in their "return-policy insurance" to which they were entitled by their relocation agreement, companies did their best to make employees "feel at home in Calgary".

Thus, for the first year upon arrival to Calgary, these companies put together and partially subsidized a variety of after-hours activities like wine-and-cheese parties, dining and dancing evenings, and "special outings" (e.g., to Banff, the casino, the theater, a Calgary Flames hockey game, Heritage Park, Stage West). Occasions such as these served to bring employees, their partners, as well as their children together and even though not all employees took part in the festivities, these events had the desired effect of "breaking the ice" for the newly arrived families in Calgary. While it is true that some employees had already made each other's acquaintance in Ontario or Québec through their work, the majority of them had never met or only knew each other by name or

through limited interaction at work. In other words, except for occasions like the annual Christmas party, most employees, prior to relocating to Calgary, did not feel compelled to fraternize at work or outside of work because they had an established network of other non-work friends and acquaintances that they had built and “cultivated” over the years on the basis of common interests and affinities. However, this social outlet was no longer within their reach once they moved to Calgary, and the need to establish a new social network arose as a result.

*Transitory Networks and Experiential Similarity*

The majority of employees and their families, therefore, took advantage of these company-sponsored “mingles” to forge some initial contacts with other relocatees. These relationships were essentially formed out of convenience and were seen as being temporary or transitory while employees and their families familiarized themselves with and got settled in Calgary. As one employee stated, “I wasn’t looking for a life-long friend but just someone to occasionally go to lunch with or shoot a game of pool with until I was established enough to start making some real friends”. These relationships, in other words, were not based on mutual interest or commitment necessarily, but rather were entered into very casually with “few strings attached” for the duration of their transition. It was not, for most employees and their partners, their intention to invest a significant amount of time and energy in developing meaningful relationships with people they probably would not have chosen as friends under different circumstances. As the partner of one employee commented, “you arrive here, you’re all alone, you meet

someone at work, she won't be your best friend but because you're here and your husband works for the company, you kind of latch on to that".

Although forming friendships with people at work was a convenient way of establishing a social network in Calgary, even if it was a transitory one, these relationships were instrumental in providing employees and their families with the kind of support they needed during the settling process. Without other sources of social support, geographically distant employees and their families came to depend on these friends to get them through the worst of times. Unlike family and friends at home who did not relocate and, therefore, could not exactly relate to what they were feeling and what they were going through, their fellow relocatees were sympathetic to their plight for they too were living the experience of the move. They took comfort in being able to share their "ups and downs" with someone who understood. There was a solidarity in these shared experiences and, weak as these ties may have been, these relationships persevered largely because of the solace derived from this experiential similarity. As the wife of one employee said, "the reason we gravitated towards each other in the first place and never completely let go was probably because we knew exactly what the other was going through and we took comfort in that". One woman explained this solidarity in shared experience among relocatees by making the analogy to the camaraderie that develops among students in college dormitories as a result of being away from home.

When I first arrived, I remember calling my mom and telling her that I was going out more in Calgary than I ever did in Montréal. It was a little like when I was at the University of Sherbrooke. No one was from Sherbrooke, we all came from elsewhere. We were all from different cities and we came to the University of Sherbrooke to get our degrees and a spirit of solidarity emerged between us because everyone was isolated. The first

week we were in rez, there were parties and we met everyone. We were going out left, right, and center, we organized week-end ski trips, that's the way it was. By contrast, when I went to McGill, everyone there it seemed was from Montréal so no one spoke to each other. We went to class and good-bye, we went home. Every once in a while there was a little party but I never met as many people at McGill as I did at Sherbrooke. It's not a question of language or a question of age, or even a question of the university.

Francophone employees and their partners, in particular, drew comfort from these transitory relationships as they involved befriending other French-speaking employees from Québec. Given the added difficulties that French-speaking families faced upon relocating to Calgary as a result of their language and cultural background, the company of fellow Québécois preserved a little cultural consistency in their otherwise "very English social worlds". Hence, of the francophone employees who took part in the company social activities, the majority made a serious effort to get to know the other French-speaking families that had moved from Québec. While many of them met at work functions, some of the employees' partners met and became friends with the wives of other employees at the weekly English classes that were organized and sponsored by their husbands' companies. Still others met at various francophone establishments in Calgary like the French community center, la Cité des Rocheuses, as well as the French school, Sainte-Marguerite Bourgeoys. A few made their acquaintance at the French language parish, Sainte-Famille, as they and their children attended the catechism lessons in preparation for the latter's Communion and Confirmation.

When asked if they had a preference for initiating a relationship with a French-speaking person from Québec or a francophone in general, the overwhelming majority of them had a preference for the former. As one woman said, "it's not just about the

language although that certainly helps but, more than that, it's about the culture of Québec that's very different from say the culture of France, Algeria, or even Manitoba, New Brunswick, and Alberta". For this reason, many of them had no desire to become involved in the francophone community of Calgary whose members represented a plethora of nationalities and cultural backgrounds. Instead, they preferred to "hang out" with French-speaking Québécois with whom they shared more commonalities.

These relationships represented a huge source of social support as they mutually encouraged one another to "focus on the positives of the move", to not give up on what seemed like a hopeless chance of learning English, and most importantly, to "open up and talk about their feelings" without reservation or shame. These relationships were also helpful in terms of transmitting information on things as pedestrian as the name of a local French doctor, dentist, or realtor; where to go in the city to find certain food ingredients, a particular hair stylist, or a certain item of clothing; and the availability of extracurricular activities in the community for their children, such as French summer camps or French-language sports teams. These alliances were extremely beneficial in keeping them "in the loop" as to what was transpiring on the local scene, such as a francophone comedy act passing through Calgary, or a French singer performing on a Calgary stage, or even the inauguration of a local restaurant featuring authentic Québécois selections like Montréal smoked meat, *pâté chinois*, or *tourtière* on their menus.

"Getting Out" versus "Sticking to Themselves"

As was the case with physical and psychological settlement, employees and their families differed in terms of the manner and extent to which they settled socially in

Calgary. While some made a conscious effort to get out and socialize as much as possible, others had a tendency to stay close to home and “stick to themselves”. Employees’ psychological time frame once again influenced which of the two approaches they took to settling, so that permanent and flexible relocatees were more prone to adopt the former approach than purposive relocatees who more often than not took the latter approach. As a result, permanent and flexible relocatees achieved a higher degree of social settlement than their purposive counterparts.

However strange they felt upon arrival to Calgary, permanent and flexible relocatees planned on staying in Calgary permanently or at least for as long as it suited their purposes, made a concerted effort to “get out of their shell” and forge some meaningful relationships in Calgary. These were employees who realized fairly quickly the importance of developing a social network in Calgary and, with that in mind, happily took part in the various events put on by their companies, mingled with other employees and their families, and from there made arrangements to get together in the future. As one employee commented, “we were going to make the best of it in Calgary so we figured the faster we made friends, the more fun we would have, and the happier we would all be”. These employees took to settling socially the way they took to settling physically and psychologically - with a steadfast determination to leave the past where they felt it belonged and focus on starting a new life. Moreover, the effect of feeling settled in Calgary at a physical level combined with the effect of being psychologically at peace with the move facilitated employees’ and their families’ social settlement, which subsequently reinforced their feelings of physical and psychological settlement.

Purposive relocatees, by comparison, bided their time in Calgary and, therefore, showed no keen interest in establishing roots of any kind in the new city. As one employee stated, "what's the point of making new friends when I have all the friends I need back home". Although some participated in the activities organized by their companies, most did not follow up on their initial encounters with other employees and families by taking the initiative, for instance, of calling them up, inviting them for dinner, or making an arrangement to get together at some later date. On the contrary, many did not venture out much, and spent most of their leisure time either doing things alone, like reading and dabbling in arts-and-crafts, or doing things with the family like playing board games and watching movies. Moreover, when they did go out, they more often than not went out as a family. These employees found it pointless to invest any of their time and emotional energy into establishing friendships in Calgary that invariably would end upon their departure. As the wife of one employee explained:

Because we're here temporarily, what I realize is that we've become more closed in on our little nuclear family than before. We do more as a family, we ski a lot more as a family, and we do a whole lot less with other people, with other families. We became, at least that's my impression, more closed in as a family. We're into...what's that popcorn word?...yes, we're doing a whole lot of 'cocooning' which is fine because what's the point of making friends when you're gonna leave in a couple of years?

As a result, the mind set of purposive relocatees and their families prevented them from settling socially in Calgary as it prevented them from settling physically and psychologically. Instead of resuming their lives and doing what they did prior to moving, they lived differently in Calgary than they did in Toronto or Montréal. In addition to having a different type of home than what they were accustomed to or would have liked

and being reluctant to let go of the past, they also changed their social habits. Moreover, in an interactive way, failure to settle completely into their new environment coupled with their psychological inability to make peace with the move, subsequently aggravated their social settlement which, in turn, further influenced their physical and psychological settlement.

#### Managing the Change(s): Employees' Use of Coping Strategies

As focused as some employees and their families were on starting anew in Calgary, the settling process was difficult for everyone involved. Employees and their partners admitted to having to "keep their cool" as they got swept up in a maelstrom of activity with what at times appeared to be no end in sight. As one employee said, "the whole settling period was a blur and we couldn't see it getting better any time soon because we were in such a frenzy to get settled in our house, deal with the life we gave up in Toronto and the loss of our families and friends, and at the same time, try to make as many friends as possible to compensate for our losses".

Although the manner in which they settled into their lives in Calgary was largely reflective of their psychological time frame, the extent to which they emerged from the settling process and adjusted to their new environment was contingent upon the coping strategies they employed to deal with the change(s) in their lives. Employees and their families essentially used one of two strategies: (1) 'proactive' strategies, or (2) 'reactive' strategies. Proactive strategies were initiatives used by employees and their families for the explicit purpose of aiding and "getting them through" the difficulties incurred as a

result of the move. Employees, in other words, intentionally took up certain activities or frequented certain establishments to help them deal with and accept the changes in their lives. By contrast, employees who used reactive strategies in response to their new circumstances did not intentionally go places or do things to facilitate their adjustment but instead chose to “let nature run its course”. That is to say, instead of seeking out and doing things to spur their adjustment to the new city, those who employed reactive strategies preferred to let things unfold in their own way and time, and essentially did little to speed up or facilitate their adaptation.

#### *Proactive Strategies*

Having the “right” attitude towards the move and the changes it inevitably entailed was key to a successful relocation. Some employees and their families made it a point to look for the “positives” in the new city and focus on the “uniqueness of Calgary” and what the city had to offer as opposed to dwelling on those things it lacked in comparison to Montréal or Toronto. Bob, whose move to Calgary was his second experience with corporate relocation, had his previous experience to know that moving with the right attitude was a choice people made and one that “made all the difference in the world” in terms of achieving a level of comfort in the new environment.

It’s about having the right state of mind. This will work or not work based on the choices that you make. And people need to recognize that coming to a new city and being miserable, is a choice that you’re making. The city is not making you miserable. You are choosing to be miserable in this city. People try to recreate what they had in the old city in the new one. So people from Montréal get frustrated when they come to Calgary and say, ‘I’ve looked for three days and I can’t find a brick house’. Well, duh, you know, is that a surprise? Or people will go back to Ontario and say, ‘I’ve looked everywhere and can’t find a house with a built-in cook top or the oak that we have out here’. You know what I say? Get over it! You have

to kinda look for what will work for you and not try to recreate what you had in the past. You have to have the right attitude for it to work.

Although having the right attitude certainly helped employees and their families achieve a level of comfort in the new city, it did not, by itself, guarantee successful adjustment to Calgary. However, when combined with the use of proactive strategies, employees and their families managed to adjust relatively well on all levels - physical, psychological, social - to their new environment. As one employee commented, "it wasn't by sitting on the couch and brooding that we were going to adjust to the move and so we consciously got up off the couch and actually did something about it".

As part of their physical adjustment, some employees and their families coped with the reality of living in a new city by "bringing closure" to the lives they once led in Montréal and Toronto by strategically placing one or more objects that epitomized their past in their homes, such as a display of "family photos" on the living room wall, or a framed picture of their hometown on the wall in the family room. The display of these various tokens of their past represented a way of paying tribute to a life they once had enjoyed in Toronto and Montréal and, more importantly, were concrete reminders that they were no longer back East but starting anew in a different city. For example, an employee from Montréal had an oil painting made prior to moving to Calgary of *la rue Saint-Denis*, a trendy street in Montréal, which he hung on the wall in his den to "commemorate" both the forty years of his life in that city and the beginning of a new chapter of his life in Calgary.

Although relinquishing the past and embracing the future were essential for coming to terms with the move in one's mind, employees and their partners propelled

their psychological adjustment by focusing on self-development and ways in which they could take advantage of the move to achieve some personal goals. Some perused a host of self-help books to help them better understand and cope with their losses as a result of the move, and while this strategy proved useful for some, others did some “soul searching” on their own and spent a significant amount of time reflecting on the things they had done and those they had yet to do. As the partner of one employee stated, “I figured I’m here and I’m not going anywhere so if there was ever a time to do those things that I’ve been meaning to do for a while but kept putting off, now was the time”.

Several individuals employed “self improvement” tactics such as registering for computer courses, language classes, and exercise sessions. A young man who relocated with his company to Calgary coped with his loss of family and friends by going back to school and getting a college diploma. The partner of another employee managed her losses of family, friends, and a job she enjoyed by “going for that university degree I always wanted but never got”. Yet another worked through his pain by “shedding off the extra weight I had been carrying around for years”. Jocelyne, who lost her job when she relocated with her husband from Montréal, not only enrolled both herself and her husband in a series of Spanish classes “for the fun of it”, but also used the move to Calgary as an opportunity to “face up to my lack of education and finally do something about it”.

I lost my job, or should I say, my boss in Montréal refused to give me a transfer to Calgary because I didn’t have enough education. That realistic piece of information really hit me hard. I didn’t even know Word Perfect at the time. And the skills I did have were only applicable to that company. I didn’t and couldn’t fit anywhere else. I didn’t have anything to offer so I went to SAIT and I took all the computer courses that were offered and I mean all of them from the most elementary courses that explain what’s a drive, you know, and all the computer language. I learned

DOS, Word Perfect, Lotus. I took some accounting courses. It was a question for me of facing reality. You either stay home and bawl your eyes out, "oh why did I leave, I was good where I was" or you come to terms with reality that no, it wasn't all that good where you were, and then you do something about it. I did something about it and I not only learned a lot and feel better about myself as a result, but I attribute my personal successes, so to speak, with Calgary and the move and that really helped me deal with the move in my mind.

In terms of social adjustment, the employees and partners who adjusted the best were those who made the effort to supplement their initial, transitory networks, which consisted primarily of a few employees and their families, with more people from and outside of work. These people not only had the attitude "I'm new in town and it's up to me to go out, make the first move, take the first step", but approached their task of relationship-building with remarkable tenacity and perseverance. Building and expanding their network of friends was their way of coping with the move to Calgary.

They met and forged friendships with people by participating in various local organizations, work-related associations, and sports or other leisure activities. Many employees and their partners joined organizations like 'Newcomers' that catered to new arrivals in Calgary. Participation in this organization gave them someplace to go once a month and interact with people who, like themselves, were new to the city and were going through similar trials and tribulations as a result of being geographically displaced. It also served as a medium by which to expand their social network of friends. As one employee stated, "joining Newcomers was the best thing that happened to my wife because she met a lot of her friends who then became my friends and that's been a great help for us". Other local organizations like the Legion of Calgary and the breast-feeding support group, the Leche League, were also instrumental in developing people's social

networks in Calgary. Some employees and their partners joined career clubs or associations, not only to keep track of the latest trends and developments in their line of work but also to meet and befriend other people with similar interests. Others indulged in various athletic pursuits like baseball, hockey, golfing, and curling, and met some very close friends that way. Still others resumed or took up for the first time leisure activities like bridge, crochet, bingo, and wood carving in order to “do something fun and meet people while doing it”.

For some individuals, these relationships were more meaningful than friendships formed at work because they were forged out of mutual liking and common interests rather than simply experiential similarity. That is not to say, however, that the friends they made through work were not important. On the contrary, as was mentioned in the previous section, these transitory networks were critical for employees and their families during the settling process. With time, however, these transitory networks tended to develop into permanent networks, remain transitory, or dissolve altogether. Those employees and their partners who employed proactive strategies like the ones just discussed, typically saw their transitory networks transform in one of two ways: either into a permanent, meaningful network of very close friends who also happened to be co-workers, or into a new network consisting primarily of people outside of work.

#### ***Reactive Strategies***

While some employees and their families had a positive attitude towards the move and took the initiative to get involved in various things to help them cope with the changes in their lives, others had a more negative attitude and showed very little or no

inclination to ameliorate their situation. These were people who more often than not complained about what was missing in the new environment instead of paying more attention to what the city had to offer. The more popular complaints were that Calgary had few lakes and trees, a “dull downtown core”, and the “worst drivers in the world”. Moreover, few of them acknowledged Calgary’s positive aspects, such as its majestic mountains and vast blue skies, its vibrant “outdoors” culture, and its shorter commute to and from work.

In addition to their negative attitudes, these people responded to the changes in their lives by retreating into their metaphorical shells, preferring to let things happen as opposed to making them happen. Unlike individuals who employed proactive strategies to facilitate their physical, psychological, and social adjustment, these employees and their families did not register for courses, join clubs, take up hobbies, or even participate in activities. Many of them did not even resume activities they had pursued in Toronto or Montréal like bowling, tennis, and going to the gym because, by and large, “the people they used to do those things with were back home”. As one employee said, “I didn’t go out of my way to joins clubs or take up hobbies in order to meet people because the way I figured it, time would take care of everything”. Although time did help heal some of the losses of relocation, it only went so far in facilitating people’s adjustment to the new city. As a result, many of these individuals made very few friends in Calgary and of the few employees who occasionally attended some of the functions at work, only a very small number managed to establish a transitory network of co-workers. Moreover, given the lack of effort on the part of these employees and their partners to cultivate these

friendships, these transitory networks over time remained transitory and rarely developed into permanent networks.

#### *Psychological Time Frame and Coping Strategies*

The permanent and flexible relocatees, by virtue of their attitudes towards the move, were more likely to have adopted proactive strategies than the purposive relocatees. This latter group were more likely to have employed reactive strategies, with one notable exception - the French-speaking purposive relocatees from Québec. Irrespective of their psychological time frame, French-speaking Québécois were more proactive in their adjustment to Calgary than they were reactive. It appeared that this group of francophones were aware that their adjustment to Calgary would be more difficult given their language and culture and, as a result, made more of a concerted effort to adapt to the new environment. In essence, they reclaimed some control over the move and how it invariably affected them. As one francophone woman who relocated with her spouse mentioned, "I may not have had much of a choice to move because my husband was the only breadwinner and his job was a good one but there was no way I was going to let the place I moved to dictate my happiness or well-being just because I was French".

The francophones from Québec, therefore, were not only more proactive than the rest of their purposive partners, but they were also more innovative and entrepreneurial in spirit than their proactive anglophone counterparts when it came to employing coping strategies to adjust to their new environment. For instance, in addition to using the proactive strategies discussed above, francophones from Québec created their own versions of organizations like 'Newcomers' exclusively for "transplanted Québécois".

Affectionately known as the “Frogettes”, one unofficial group consisted of more than a dozen francophone women from Québec, most of whom had relocated to Calgary because of their partners’ jobs. These women got together every month at a restaurant of their choice where they discussed “everything and anything” over dinner and drinks. Another unofficial organization dubbed “*La parlotte*” (or chitchat), convened every Wednesday evening for a couple of hours at a martini bar in Calgary known as *The Newt*, where relocated Québécois could meet and chat over a few drinks.

Moreover, French-speaking Québécois in general - be they permanent, flexible, or purposive relocatees - put a greater amount of effort into cultivating their friendships in Calgary than the English-speaking employees. Although they went out and did a variety of social things together like skiing, hiking, golfing, dancing, going out for dinner, and going to the theater, they also instituted “theme nights” where, several times a year, they “congregated” at each others’ homes for either a “Montréal smoked meat party”, a “Montréal Canadiens hockey game”, or a “murder mystery game night”. In addition, they carried on various Québécois traditions in Calgary such as group outings to *la cabane à sucre* (sugar shack) every March and celebrations of *la Saint-Jean Baptiste* every 24<sup>th</sup> of June<sup>7</sup>.

These social encounters not only provided its participants with a great source of social support but they also presented invaluable opportunities for the development of meaningful relationships with fellow Québécois in Calgary. As a result, francophone Québécois constructed a significant, tightly-knit social network in Calgary. Among other things, this network of fellow Québécois enabled them to keep a finger on the pulse of the

proverbial heartbeat of Québec in Calgary. All the while they were settling into a new city, the friendships they established and the networks they created prevented them from losing touch with their “cultural roots” and, as a result, facilitated their adjustment to Calgary.

#### Adjustment to the New Environment

Even under the best of conditions, adjusting to a new environment, that is attaining a level of physical, psychological, and social comfort, is neither simple nor instantaneous. It requires the right kind of attitude, a fair amount of effort, and a certain period of time. As this chapter demonstrated, the attitude of employees towards the move was conditioned by their psychological time frame which invariably affected the manner and extent to which they settled physically, psychologically, and socially in Calgary. More specifically, permanent and flexible relocatees, on average, had a more positive attitude towards the move and, hence, a more successful settlement period than purposive relocatees. However, as the latter part of this chapter made evident, the coping strategies used by employees and their families affected their adjustment, so that those who adopted proactive strategies achieved a higher degree of adjustment to the new environment than those who employed reactive strategies. Although the majority of those who employed proactive strategies were permanent and flexible relocatees and the majority of those who employed reactive strategies were purposive relocatees, French-speaking Québécois deviated from this pattern. As a result, despite the differences in language and culture and irrespective of the fact that there were more purposive

relocatees amongst the French-speaking employees, they by virtue of being more proactive in their coping strategies, adjusted just as well to their new environment as both their permanent and flexible counterparts.

In sum, the familiarization stage of the relocation process was that period in which employees and their families settled into and adjusted to their new environment. The manner and extent to which they settled and adjusted to the relocated area was largely dependent on their psychological time frame which was influenced by their perception of choice to move. Employees who perceived to have a choice to relocate were more likely to be either permanent or flexible relocatees and, as such were more likely to achieve a greater degree of physical, psychological, and social settlement than their purposive counterparts. The latter were more likely to consist of employees who perceived to have little or no choice to relocate and, as a result, moved with the idea that their stay in the new area was temporary and settled accordingly. Needless to say, their degree of settlement was significantly less than those employees who moved with a more permanent or flexible attitude. Although settling into their new environment may have been a difficult transition for all concerned irrespective of their psychological time frame, the extent to which they emerged from the settling process and adjusted to their new environment was largely dependent on the coping strategies they employed to expedite and facilitate their adaptation. Again, a very clear pattern emerged among employees where the permanent and flexible relocatees showed a tendency of using more proactive strategies to adjust to their new environment than reactive strategies which was the choice of most purposive relocatees. The exception to this general pattern were the

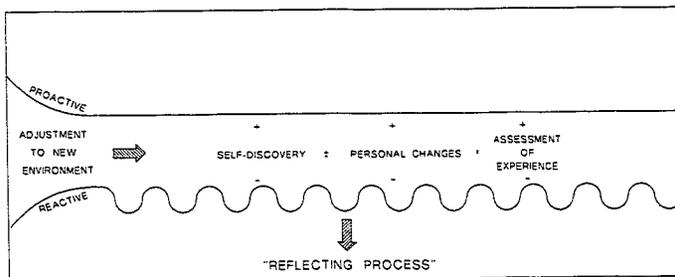
francophones from Québec who, perhaps in anticipation of experiencing a difficult adjustment period as a result of their cultural differences, were more likely to employ proactive than reactive strategies whatever their psychological time frame may have been. The greater the use of proactive strategies, the greater the degree of adjustment to the relocated area. As a result, francophone Québécois purposive relocatees achieved a comparable level of adjustment to the new area as their permanent and flexible counterparts. This degree of adjustment, as the next chapter will demonstrate, affected what they learned about themselves as a result of their experience as well as the manner and extent to which employees and their families changed as a result of the move.

**CHAPTER 7****LIFE AFTER THE MOVE:****ASSESSING THE EXPERIENCE OF RELOCATION**

While change is often viewed as a troublesome intrusion to be avoided altogether or minimized at best, equilibria is perceived as a beneficent state to be maintained and restored in the event that it is disturbed. Hence, once the disruption brought on by the move subsided and employees and their families adjusted to their new environment to the extent that they were willing or able, they proceeded to restore some stability in their lives by resuming what they called a “normal” life. For many, resuming a normal life meant getting back into a familiar routine or an accustomed way of life. At this juncture in their relocation experiences, “getting into the normal swing of things” was imperative for employees and their partners who felt they had, up to that point, dealt with enough changes and that it was “time to move on”. As one employee stated, “when the calm came after the storm, it was time for me to start living a normal life again”.

Although they craved some normalcy in their lives, employees and their partners realized they could never completely go back to living the same way they did in Toronto or Montréal. Apart from the obvious reasons that they were now living in a new city, in a new home, and far away from family and friends, they were acutely aware of the fact that they were no longer the same people they once used to be. Their experience with the move led them to discover certain things about themselves which subsequently changed them in some intrinsic and irrevocable way. As a result, they could never metaphorically

**Figure 3: Stages in the Relocation Process**  
*Stage Three: The Assessment Stage*



step into the same shoes and walk the same path they did prior to the move. While some went through subtle changes, others experienced more significant ones. Nonetheless, whatever the degree of change, employees and their partners resumed their lives in light of it. The manner and extent to which they changed as a result of the move, and the way in which these changes influenced the resumption of their lives in the new environment, are the focus of this third and final stage of the relocation process to which we will now turn our attention.

### Stage Three: The Assessment Stage

The final, or what I refer to as the 'assessment stage' of the relocation process, is a modified version of Nicholson's (1987:189) "stabilization stage" of the transition cycle. Although the goal of restoring and sustaining a "dynamic equilibrium" after adjustment to change has occurred is the same in both conceptualizations, the focus of the former deviates from that of latter. In essence, the focus of the 'assessment stage' is not so much on the 'means' used by employees to restore equilibrium in their lives as it is on the 'meanings' they derived from their relocation experience and the influence these meanings had on the degree of stability they achieved in their lives. In other words, where the central purpose of the "stabilization stage" is to achieve stability by "sustaining trust, commitment, and effectiveness with tasks and people" (Nicholson, 1987:181), the central task of the 'assessment stage' is, as its name implies, to make sense of or assess one's experience with corporate relocation and move on from there.

This assessment is made on the basis of what employees and their families learned about themselves as they went through the experience of relocating, as well as the personal changes they underwent as a result of this self-discovery. The combination of their self-discoveries and personal changes made for either a more positive or more negative experience with corporate relocation. As Figure 3 illustrates, the extent to which employees and their families resumed a normal and steady life was conditioned by their adjustment to the new environment which, in turn, influenced their assessment of the relocation experience. That is to say, the manner and extent to which employees and their families adjusted to their new environment influenced in large part what they learned

about themselves and the personal changes they experienced as a result. Hence, those who employed proactive coping strategies to facilitate their adjustment to the new environment discovered more significant and positive things about themselves and changed in more positive ways as a result, thereby rendering their experiences more positive. By contrast, those who employed reactive coping strategies were more likely to discover either insignificant or negative things about themselves and change in a minimal or more negative ways, making their experiences more negative. The more positive their experience, the steadier the resumption of their lives (hence, the straight line extending from the proactive strategies in Figure 3) and, conversely, the more negative their experience, the less stable the resumption of their lives (thus, the jagged line).

#### Experiencing Relocation: A Journey in Self-Discovery

From every experience in life, be it good or bad, there are lessons to be learned. As painful and challenging as the transition from Québec and Ontario to Alberta was for employees and their families, they emerged from the experience having learned something profound about themselves. For many employees and their partners, the experience was an “eye-opener” in that the move gave them insight into certain aspects of their personality they had heretofore overlooked. In essence, their move to Calgary was more than a simple job transfer. It was a journey in self-discovery.

#### ***Assuming the Risk***

Change necessarily entails an element of risk because of the unpredictability of its outcome. Hence, irrespective of their perception of choice to move to Calgary, many

employees felt that by consenting to the relocation, they were essentially risking their happiness for financial security. As one employee said, "of course, when faced with a decision such as this, you always think about the worst thing that can happen and, in the event that something should go wrong in Calgary, I knew the moment I agreed to move that I was potentially putting my marriage, my relationship with my kids, and my overall well-being on the line".

The majority of employees and their families, therefore, felt they were taking a chance on making the move. This was particularly true for French-speaking employees who, in addition to fearing that they, their partners, and their children would not adjust to the new environment and would be miserable in Calgary, feared the possibility of ostracism in the new area because of their linguistic and cultural differences. Moreover, for some of the partners of relocated employees, particularly the ones who moved to Calgary without a job, the move presented an even greater risk since they felt they were losing more than their partners by moving. This risk was amplified for those unilingual, francophone women who consented to moving with their partners with the knowledge that they may never adjust to Calgary, let alone be in a position to secure a job in the city, because of their inability to effectively communicate in English.

However, in spite of their legitimate concerns, employees and their partners assumed the risk and, in so doing, realized they were "gutsier" than they had originally thought. As they reflected on the courage and stamina it took to move, and the number of people they knew who had refused to take the risk, they admitted being somewhat proud of possessing the strength of character to move across the country and start over. While

some employees knew they “always had it in [them]”, others were genuinely taken aback by their display of courage. One employee, who professed to being risk-averse his entire life, surprised not only his wife but himself when he actually “bit the bullet” and moved his family to Calgary.

I'm, I guess, what you would call very reserved, very set in my ways, ultra-conservative. Sure, there are things I'd like to do in life but I don't have that driving spirit of... let's do it! I'm not the type who gets some kind of impulse and immediately acts on it. No. I'm a planner. I'm not spontaneous in the least. On the contrary, I'm extremely cautious. I've got this little comfort zone that suits me to a tee and I have no desire to get out of it. For this reason, my wife never thought I'd agree to the move. It was a good career move for me and I agreed to it. She's still shocked I did it, I think. Come to think of it, so am I. Like I said, it's completely out of character for me...or at least that's what I thought. But I did it. I guess I have more gumption than I thought.

Whether employees and their partners were French or English, perceived they had a choice to move or not, adjusted well or poorly to Calgary, or used proactive or reactive coping strategies, they all came away from their experience having learned at least one important thing about themselves - namely, that when confronted with a difficult decision, they had the courage to mobilize their fears and misgivings and “do what needed to be done”. One employee from Toronto who was reluctant to move but felt he had no choice if he wanted to hold onto his job, realized he was much “tougher” than he thought. He spoke for many employees and their families when he said, “if one good thing came out of all of this, it's that I learned that when the going gets tough, I get going”.

*Being Put to the Test*

Having the fortitude to accept the relocation offer and move to a new city despite the potential for problems and unhappiness is one thing. Confronting those problems when they arise (and they do arise even under the best of circumstances) and dealing with them is another. Many employees and their partners, particularly during the settling process, admitted to feeling like their ability to deal with the change was being put to the test. As one employee stated, "it was so tough at times that I thought someone was testing me to see how much I could take...much like those caged rats in lab experiments where they're inflicted with so much pain and torture to see just how much they can tolerate before succumbing to the inevitable".

This feeling of being put to the test was felt more by some than others and was experienced both at work and at home. For instance, some of the employees who moved into either a new lateral position or a superior position as a result of the relocation felt, for the first few months, like their competence and performance within the company were being put to the test. This was particularly true for French-speaking employees who, in addition to being in a new position, were working in an entirely anglophone environment, often alongside people who came from elsewhere. One Québécois employee admitted to not only feeling the pressure of proving to his employer that he was worthy of the promotion, but also proving to himself and his co-workers, who more often than not were English, that he was the right person for the job irrespective of his minority status.

In Montréal, I never thought about how people would judge me at work. Yeah, most of the people who worked for the company were English but there were lots of francophones, too. And it was Montréal, you have to remember. When I came to Calgary, I wondered how receptive employees

and managers would be to a francophone being at the helm of the formation group. In Montréal, I only had 8 instructors under my tutelage and supervision. I now have 30 and many of them are from Western Canada and Ontario. There are very few francophones here. On my floor, there's about 5 of us out of several hundreds. So when I assumed my new position, I couldn't help but feel like they were all watching me and wondering 'what's this little Québécois doing here...does he really think he's going to show us what to do?'. I actually wondered that myself. I felt like perhaps I was a little out of my league. So the pressure to perform well and show them that there was a reason why I was in charge was definitely there.

At home, the feeling of being put to the test was no less intense. On the contrary, those employees and partners who went through an especially difficult time dealing with the loss of their family, friends, and jobs felt particularly vulnerable to failure and, on several occasions, came close to "throwing in the towel" and returning to Montréal or Toronto. As a group, francophone employees and their wives came the closest to "giving it all up", preferring to return to their family, friends, and a familiar culture rather than "sticking it out" for the sake of a job. The francophone partners who spoke no or very little English were more prone than their bilingual counterparts to give up and go back to living in Québec where "life was much easier because of the French". As one francophone employee pointed out, "when I came home night after night and found my wife sitting there in tears, I just wanted to give up, walk into work the next day, give in my resignation, and go back to Québec, because as far as I was concerned, staying for my job just didn't seem worth it".

As tempted as many of them were to invoke their "return-policy insurance" and go back to Ontario and Québec, they chose to renounce it in the end for various reasons. The fact that they would have no job to return to was the more obvious one, but there

were other reasons that had more to do with how they and others would perceive their returning home. Many felt they could not give up and return to Ontario or Québec because to do so would mean they had failed in some way. As one employee said, “the last thing I wanted to do was go back home with my tail between my legs”. Others pondered the possibility of leaving but eventually changed their minds because packing up and going home, in their opinion, smacked of cowardice. As one employee commented, “I suppose I could have gone back but that would have been taking the easy way out”. Still others refused to give in to their desire to go back home because, to do so before they put in the requisite time to adjust, would be hasty and unwise. “I figured if I left before giving Calgary a real chance, that would be just plain stupid not only because I may learn to like Calgary but also because this may actually be a better place for me and my family to be”.

Moreover, although francophone employees came the closest to returning to their province of origin, they were also the most adamant about not giving in to their fears and insecurities. Part of the reason for their steadfast commitment to “making it work” in Calgary stemmed from their unwillingness to let anyone or anything dictate where they would live and work. One employee expressed it best when he said, “I would be damned if I was going to let anyone or anything drive me out of town because I was different, or because I didn’t fit in, or because I talked funny”. Pride was another reason that kept francophone employees, and especially their partners, from succumbing during the most difficult times. As one francophone woman who knew very little English and refused to go back to Québec despite the difficulties she was having with the language said, “there

was no way I was going to leave Calgary because I couldn't learn English - that would have been shameful!"

By staying in Calgary and "toughing it out", employees and their partners discovered a number of things about themselves, the not least of which was the extent of their attachment to family and friends back home. As one employee stated, "it wasn't until I left Toronto that I realized just how strong a bond I had with my family and friends over there". However, what distinguished those employees who adjusted better to Calgary from those who adjusted more poorly was that the former learned that with a little time and effort they were capable of relinquishing that bond and starting anew. The latter, on the other hand, learned they were "unable to let go". These were the employees who reflected more on what they took for granted in the past and how much "better off [they] were then than now". Their experience with the move taught them that they were more "homebodies at heart" and not as adaptable to change as they may have thought. It also made them aware of how "complacent" they were in Toronto and Montréal, "doing [their] thing day after day and how simple life was doing just that". As one employee said, "I thought I was more of an adventurer, that I had a little bit more of that wanderlust-thing happening, but I guess I didn't realize until I moved here just how comfortable I was in that zone I had created in Toronto".

While some employees accepted this discovery and saw it as being neither positive nor negative, others found the revelation rather disappointing. Their disappointment essentially stemmed from their realization of the extent to which their identities were anchored in their "comfort zone", which ultimately precluded them from

“embracing” the move and reaping the benefits from their experience. Deandra, who relocated from Toronto, explains her disappointment in the following manner:

I learned from this move that I’m a creature of habit. I can’t help wondering what kind of experience I would have had if I weren’t so attached to my life in Toronto. I know lots of people in the company who, for them, picking up and moving isn’t a big deal. The move didn’t even phase them. “Get over it and move on,” is what some of them used to tell me. God I wish I could. I would have been so much better off. Instead all I kept harping on for the first three years we were here, and still do I’m ashamed to say, was how much I missed the nest I left behind. I hate not being in my neighborhood just a couple of blocks from my parents and within a 10-mile radius of my friends, or going to my weekly book club meetings with the girls. It’s silly, I know but I feel lost without that. That’s how much my life revolved around those things. I know I’m a big girl and I should be more independent, more detached and go with the flow because that’s what life’s about. It’s about dealing with changes and adapting. It’s not about living in a bubble unless you’re happy living in a bubble. But I liked my bubble, I need that bubble. But I also realize how much I lost by being this way. If I would have tried a little harder to build a new life here, I would have gotten so much more out of this experience.

Those employees and their partners who tried a little harder to adjust to their new environment by adopting proactive instead of reactive strategies did, in fact, learn several things about themselves. Firstly, they learned how amenable and “adaptable” they were to change. Of those whose experience with relocation was their first, many felt an overwhelming sense of satisfaction and accomplishment for “getting through it and coming out of it relatively intact”. For those few who experienced relocation before, they were just as surprised at how adaptable they were “because every relocation is different and just because you’ve done it once before doesn’t mean that the second time around is any easier”.

Another valuable lesson they learned was how “undefeatable” and “tenacious” they were in their resolve to get through their ordeal. Francophones, particularly the ones

who did not speak English upon arrival to Calgary, were not only proud of their accomplishment in learning the English language, but were also astounded at the resilience and “perseverance” they demonstrated in the face of adversity. In essence, after going through one of the most trying experiences of their lives, employees and their partners felt somewhat invincible. Johnny, like most employees, felt like there was nothing he could not do after surviving his experience with the move.

When you’ve been through something as life-altering as we have and you realize that you’re none the worse for wear as a result, well, you quickly realize that there’s nothing you can’t do. That’s exactly how I felt. I felt like I could do anything I want. If you put your mind to it, you can do it. I can honestly say that’s true. It’s not just a saying because I’m living proof. I had to live it to believe it. Well, I’ve lived it and now I’m a firm believer.

#### *Rising to the Challenge*

In addition to discovering how adaptable, tenacious, and resilient they were, employees and their partners who were more proactive than reactive in their adaptation to their new environment learned that when “push came to shove”, they were capable of “rising to the challenge”. The time and effort they put into adjusting to their new circumstances by “going that extra mile” and doing as much as they could to facilitate and expedite their settlement in Calgary made them aware of the extent to which they were relentlessly driven to succeed when faced with a challenge. As one employee remarked, “I suppose it’s easy to say I’ll do this and I’ll do that if and when I move to Calgary, but when I moved and I actually did everything I said I was going to do, that’s when I realized that I could meet any challenge head on”. Hence, through their various efforts to adapt to their new circumstances, employees and their partners learned how

ambitious they were in their desire to rise to the challenge, and how indefatigably “resourceful” they were in meeting that challenge.

Francophone employees and their partners who were more proactive in their adjustment to Calgary were, in essence, no different from their anglophone counterparts in terms of what they learned about themselves as a result. The French, like the English, learned the extent to which they were willing and able to rise to the challenge presented by the move. However, given the seemingly insurmountable obstacles that francophones faced as a result of the culturally different environment in which they settled, they perceived the move as being somewhat more of a challenge and, consequently, their rising to that challenge as a more significant achievement for them than their anglophone counterparts who moved from culturally similar environments. As one francophone woman said, “all of us that moved here from elsewhere had to adapt to Calgary but the difference between me and my neighbor who moved from Ontario is that everything she did, I had to do twice as much or twice as hard to compensate for the fact that English is not my first language so, yeah, not that I want to diminish her efforts, but when I look at where she’s at and where I’m at despite the different road we took to get here, I’m proud of what I’ve achieved”.

For many francophones, their achievements attested to their capability of “fitting in” despite their cultural differences. This discovery had both a personal and social significance for francophones. On a personal level, some took the fact that they were willing and able to adjust to a “foreign”<sup>8</sup> environment to mean they were just as amenable to change and, therefore, just as “flexible”, “competitive”, and “competent” as their

English-speaking counterparts despite certain perceptions to the contrary. Francophones were not only aware of the reputation they had in English Canada as being a “sedentary group” who rarely strayed from home and who had a rather “myopic” view of the world beyond the boundaries of Québec, but they also acknowledged, to a certain extent, the veracity of this stereotype. Hence, that they were capable of extricating themselves from what they called the “clutches” of their families and their culture was, for several francophones, an achievement in itself, and that they adjusted to Calgary with comparative success to anglophones put to rest any doubts they may have had that they were in any way “inferior” to the latter. Having once been subjected to cultural stereotyping, Jean-Marc from Québec explains how he viewed his successful adjustment to Calgary as a personal victory.

In 1986, I was offered a relocation to Vancouver. But before making it official, I had to meet my future boss who just happened to be in Montréal on business. Before I even had a chance to sit down, he asks me, ‘are you really serious about moving?’. I said ‘yes’ but I knew from the look he gave me that he wasn’t buying it. I spent a good part of three quarters of an hour trying to convince him that I would move for the right opportunity. He still wasn’t convinced. He said to me, ‘you know, you francophones,...I have a brother I haven’t seen in over 5 years and it doesn’t bother me but you guys are inseparable. I’m not interested in hiring someone who in 6 months from now will come crying to me that he wants to return to Québec’. Well, I didn’t get the job because he wasn’t convinced I would tough it out. He didn’t think us Québécois would ever agree to move. Supposedly we have the reputation of being mamma and papa’s little children who never venture far from the hearth. I guess that’s why I’m proud of how my family and I adjusted to Calgary. I proved him wrong and I derive a lot of satisfaction from that.

On a more social level, francophones learned that they could function in an anglophone environment, and that they could do so without compromising their social identity in the process. In other words, they discovered that with a little effort, dedication,

and good will, they were capable of adding an “anglo-saxon dimension” to their francophone identity without subtracting from the latter in the process. Although many of them made a conscious effort to absorb the English language by enrolling in English courses, listening to English radio, watching English television, reading English newspapers, and speaking as much as possible in that language in order to better adapt to their immediate surroundings, they did not do so at the exclusion of French. On the contrary, they deliberately spoke French in the home, enrolled their children in French schools, listened to French radio, watched French television, and subscribed to French newspapers and magazines in order to preserve their culture. To ensure the vitality of the French language and culture in Calgary, francophones essentially balanced their use of both languages by conducting their public or work life primarily in English and carrying out their private and social lives almost exclusively in French.

In essence, by adopting a “bilingual life-style”, they learned that they, as a group, could “integrate” and function relatively well in an English-speaking environment without necessarily “assimilating” to the anglophone majority. Contrary to the opinion of some political and literary figures in Québec who believe *la culture Québécoise* is experienced uniquely within the territorial confines of Québec, many Québécois employees discovered, through their diligent efforts at maintaining their culture in Calgary, the extent to which the French culture was not only portable but also sustainable outside Québec. Without underestimating the amount of effort required in maintaining a francophone identity in Calgary, one employee’s pride at how he and his family, as well

as many other Québécois families in Calgary succeeded in keeping the French culture alive, resonated in his words when he said:

I remember my brothers and sisters telling me that I was off to join 'them' (meaning English people) when they found out I was moving. They were only joking but that's how some people in Québec feel...that as soon as you leave Québec, you can kiss French and the culture good-bye. Assimilation is automatic. Well, it's not! It's not your immediate environment that will change or dictate your identity. Only you can do that. I'm a French-speaking Québécois and no place or person or set of circumstances could ever change that. But you have to work at it. You have to put in the effort to keep it alive by speaking French in the home or sending your kids to French school. The schools are available. You've got to make use of them and you have to be persistent about it. The minute you get lazy, and some people do because it's easy to let the French go, well, that's when you lose it. I didn't lose it, and my kids speak just as well in French as they do in English. That's because my wife and I are very strict about speaking French at home and doing things as a family in French. We also have French friends so that certainly helps. But you have to make that happen. We did, and now we can proudly say that our kids are not only bilingual but bicultural as well.

#### Emerging From The Move: From Self-Discoveries to Personal Changes

Employees and their partners changed in fundamental ways as a result of their self-discoveries. In essence, they became products of their experience. In addition to the tangible changes they experienced by virtue of moving to a new environment (e.g., new home, friends, hobbies), employees and their partners experienced more personal changes that perhaps were not as visible or concrete but were just as profound, if not more so, than the former. Whereas these changes were partially attributable to the passage of time and maturation, they were largely reflective of the discoveries they made about themselves as a result of their experience with relocation.

If the move changed them in any way, the majority of employees and their partners commented on how much “braver” and “stronger” they were as a result of their experience. The fact that they summoned enough courage and initiative to agree to the move, despite the risk they incurred by relocating to Calgary, made them a little more daring, or, as one employee stated, “added a bolder edge to my personality”. Some employees mentioned how fearless they had become since the move. As Johnny explained, “after going through this experience, and realizing the guts it took to do it, I’m not as afraid of trying new things or making certain changes as I once used to be”.

The move also “toughened” certain employees and, as a result, they emerged from their experience with what they perceived to be a great source of strength. As one employee stated, “it’s so true what they say - what doesn’t kill you, makes you stronger - because if I changed in any respect as a result of my experience, it’s that I’m stronger now after having gone through what I’ve been through than I ever was before”. After suffering the losses of family, friends, and employment, among other things, and dealing with the problems that invariably cropped up during the settling process, the majority of employees and their partners came out of their experience feeling much stronger and feeling like “there was nothing [they] couldn’t handle”.

Given the losses and changes that accompany a major life-altering event like relocation, the majority of employees and their partners, irrespective of the coping strategies they used and what they learned about themselves, became more independent and self-reliant as a result of their experience. Prior to the move, many were surrounded by family and friends to whom they could, and often did, turn in time of need. Moving to

Calgary meant starting over in a new part of the country without the support of those people whom, over the years, they had come to rely on to varying degrees. Hence, the move to Calgary invariably taught them how to “fend for themselves” and, consequently, they emerged from their experience more autonomous than ever. An employee who relocated from Toronto explains in the following manner how the move was the catalyst for his “newfound independence”:

The company indirectly did me a favor in moving me and my wife out here. In Toronto, we were surrounded by family and friends on both her side and mine. We were spoiled in a way because we didn't need to do anything for ourselves if we didn't want to. There was always someone there to hold our hand, to lend a helping hand, to fix something or other, you name it, we had it. I even dragged my dad along when I bought my house in Toronto to get his advice. If he would have told me the house was crap, I wouldn't have bought it. That's just an example but that was my life over there. I had a leaky faucet, uncle George would come around to fix it. We wanted to go out for the evening, all we had to do was drop off the kids at my parents' house or the in-laws. It was easy. Sure, we bitched about not having them around for the first couple of months we were here but now we do everything ourselves. That's life. It was a huge wake-up call for us moving out here. We've grown up in a big way. We've cut the apron strings and we're flying solo. We're a lot more independent now than we ever were and, in a way, that's a liberating feeling.

Hence, the majority of employees and their partners, regardless of the manner and extent to which they adjusted to their new environment and what they learned about themselves as a result of the move, changed in at least three fundamental ways. They emerged from their experience a little braver, stronger, and more independent. However, as was demonstrated in the previous section, employees and their partners who used more proactive coping strategies to adjust to their new environment discovered more things about themselves and, thus, underwent more significant personal changes than those who used more reactive strategies.

In addition to becoming braver, stronger, and more autonomous, some became somewhat less “uptight” and more “laid back”, “spontaneous”, and “adventurous” as a result of the move. Although the comparatively relaxed ambiance of Calgary certainly had something to do with it, their spontaneity was more the result of what they learned from the move. In essence, once they realized that the risk they took by moving to Calgary “paid off” in that they managed, with a little time and effort, to settle into and adapt to a new environment, make new friends, and take up new activities, they became less reluctant to deviate from their chosen path in life. They became, in other words, less rigid or “less set in [their] ways” and more flexible regarding the direction in which they were going in life. One employee explained how the move had a “soothing” effect on him by “purging” some of the pressures he had put on himself to follow a certain course in life.

The move put lots of things in perspective for me. I had to know today what I was going to do and where I was going to be ten years from now and how I was going to get there. The move really loosened me up in that I still know what I wanna do with my life and where I wanna be in a couple of years from now but I’m not as anal about how I’m going to get there. I know I’m going to get there so who cares how I get there. I mean, do I really have to follow a certain path? The move made me more spontaneous that way. I took a chance with the move, and luckily for me, it worked out. But my wife and I worked at it. We made the effort to adapt. But the point is that I got to where I wanted to be without following the path I had originally mapped out in my head. I was thrown a curve-ball, and realized I had to change my plans. I did and I still got to where I wanted to be. I now have the luxury of being more carefree in life, knowing all the while that I’ll still get to where I want to go. The destination may be the same, but the journey doesn’t have to be. I know I can steer away from the path and get right back on track.

While their experience with relocation made them more spontaneous on the one hand, it gave them a greater sense of control over their lives on the other, thereby making

them more self-directed than they were prior to the move. Through their experience, employees and their partners learned how adaptable, ambitious, tenacious, resilient, and resourceful they were when faced with a challenge and, as a result, these self-discoveries reaffirmed for some the extent to which they “called the shots” or were responsible for the manner in which their lives unfolded. As one employee stated, “the strangest thing about the move was that, through my efforts, I realized that in the making of this movie which is my life, that I was the director”. Hence, the realization that they were in control of their lives imbued them with a sense of responsibility for directing their lives and, therefore, they emerged from the move with more self-direction than ever before. As one employee said, “perhaps the greatest lesson I learned from all this was that I am responsible for what happens to me in my life, so I’m more in charge of where my life is going than I’ve ever been”.

This feeling of being in control, coupled with all that they learned about themselves as they went through the experience of relocating, made employees and their partners more confident in themselves and their abilities which, in turn, gave them a sense of empowerment. As one employee who relocated from Toronto to what he referred to as the “brain center in Calgary” said, “I know now that I can compete with all these whiz bangs at head office and I’m so much more confident in myself now as a result than I ever was”. This was particularly true for those French-speaking employees who, in addition to discovering that they were as adaptable to Calgary as their anglophone counterparts, also learned that they were just as competitive and competent as the latter regardless of their language and culture. As one francophone employee stated, “when I

realized that I was just as comfortable in Calgary as my English-speaking co-workers who relocated from Toronto and that my performance at work was just as solid in Calgary as it had been in Montréal, it boosted my confidence”.

The ones who gained the most confidence in themselves and, therefore, were the most empowered as a result of the move were the partners of francophone employees, particularly the ones who spoke no or very little English when they moved. Through their efforts, they not only learned the English language but also adjusted to their new environment to a considerable extent. Moreover, while some managed to secure part-time work at various francophone centers (e.g., the French community center; the French school), others went to work for English organizations. As one woman mentioned, “that I learned English was something in and of itself, but that I ended up getting a better job in Calgary than the one I had in Montréal, well, that made me feel ten feet tall”. Jocelyne, who rose to the challenge by not only conquering her “English deficiencies” but also recycling her skills in order to qualify for a particular position she sought, claimed she never felt as good about herself as she did after the move.

I was doing well, you could say, at my job in Montréal. There was no reason for me at the time to brush up on my computer skills, my knowledge of accounting, etc...When I moved soon after my husband was transferred to Calgary, oops, then I realized that I was in trouble. I didn't speak English so how the hell was I going to get a job? Well, I took all the English courses I could get my hands on...SAIT classes, Mount Royal College classes, private classes, even a course by correspondence. While I was at it, I figured I might as well take all the computer courses I needed to get up to speed. There was a job I wanted, you see. It was for this great company but I needed Excel, Powerpoint, Access. So I took those courses and others and applied for the job and I got it. I went to the interview and everything so I guess they understood what I was saying even if I had an accent. I'm doing interesting stuff in this company, I'm making more money than I ever made in Montréal, I can't believe it. It's a way better

job than what I had before and my self-esteem quadrupled as a result. I feel so much better about myself and I know that I wouldn't be where I'm at if my husband hadn't been transferred.

Among the francophone employees and their partners, some changed in yet another significant and prominent way *vis-à-vis* their anglophone counterparts. By virtue of moving to a culturally different environment, they became "culturally richer" as a result. Although Ontarians and anglophone Québécois commented on the somewhat different culture of Calgary - namely, the slower-paced, more laid back, western mentality of Alberta - they did not perceive the move as being a source of cultural enrichment per se. Francophones, by contrast, saw the move as a "rare privilege to acquaint themselves with a different culture", and they emerged from their experience with both a "greater sensitivity for English-Canadian culture" and a "fonder appreciation for their own culture". As one employee stated, "moving to Calgary was a lesson in cultural awareness - one which every Canadian should experience - because having lived in both cultural environments, I am now equally appreciative of both cultures".

Their exposure to, and appreciation of, both cultures, in turn, made certain francophones more "tolerant" of differences in society, be they cultural, linguistic, political, or social. As one employee commented, "I was never a bigot, but I was certainly more narrow-minded in my views and less forgiving of people and issues that went against those views". For some, moving to Calgary, living as a minority, and working at maintaining their linguistic and cultural identity, made them more sympathetic to the plight of minorities. As one employee said, "once I left Québec and experienced first-

hand what it was like to be a minority, that's when I realized what immigrants in this country and even anglophones in Québec had to deal with".

For others, moving to Calgary gave them some perspective on what life outside Québec was like. As one employee said, "I had never left Québec, so naturally I thought this was the best place in the world to live, and it's not until I left and came here that I realized that there is another world beyond Québec". This realization, as well as the realization that English Canadians were "not anywhere as bad as [they] had made them out to be", made some of them more critical of Québec politics (e.g., language laws, sovereignty) and less critical of English Canada. Hence, they emerged from the move to Calgary with a more "open mind" than they had prior to the move.

By comparison, employees who used more reactive coping strategies changed in different ways as a result of their experience with the move. Unlike their proactive counterparts who emerged from their experience more spontaneous, confident, and empowered, the former became more "withdrawn" as a result of the move - a change they did not particularly welcome. As one employee stated, "I really retreated into my shell since I moved here and I hate that because I wasn't like that back home, where I used to go out once in a while with my friends and had what at least was a semblance of a normal life".

Among those employees and their partners who used reactive strategies, some also became more fatalistic as a result of their experience with the move. Contrary to those employees who used more proactive strategies and emerged from their experience believing more than ever that they were in control of their lives, the former came out of

their experience entrenched in the belief that their lives were determined more by fate than personal will. In a self-fulfilling prophetic way, these employees - thinking they could not adjust to their new environment or, better yet, preferring not to adjust - "let things happen" and, by doing that, did not adjust as well as their proactive counterparts. Consequently, their unsatisfactory adjustment to Calgary reinforced what they perceived to be their lack of control in determining the events in their lives.

#### Going the Distance: Assessment of the Experience

By and large, employees and their partners who used more proactive strategies had a better or more positive experience with relocation than those who used reactive strategies. The experience was so positive that the overwhelming majority of them responded affirmatively when asked, "knowing what you know, if you had to redo the move, would you redo it?". As painful and difficult as the experience may have been, the former faced the move by "seeking out the positives" and "getting involved" and, in so doing, learned some valuable lessons. As indicated in the previous sections, these lessons changed them in significant and positive ways, which led the majority of them to conclude that "all in all, the experience with the move was a positive one". Through their experience, many of them "evolved" and gained tremendous "personal growth". For this reason, most saw themselves as having "come a long way" as a result of the move. As one employee described, "from all that I've learned about myself as a result of the move and all the changes I've noticed in me, I can honestly say I've come a long way in just a

few years". Nadine, who relocated from Toronto, explains how she "went the distance" when she moved to Calgary:

I was scared shitless to move out of Toronto because I had never left before. Everything I've ever known and done was in Toronto. Sure I went on vacation but the thing about vacations is that after a week or two, they're over and you get to come home. There was no coming home if I was relocating to Calgary. Calgary was going to become home. Well, I tried my best, I gave it my all. It wasn't easy. There were a lot of tears, a lot of pain, a lot of fear, but I had a good attitude. I went out there and made friends and did the best I could under the circumstances. I've often thought about everything I've done and how much I learned and how much I've grown since I moved. It's incredible! I really feel like I've gone the distance, you know? I got out of Toronto, I met other people, saw different things, did things I never thought I'd do (who would thought I would ever go back to school and get my BA), and came out of it feeling really, really good about myself. Had I not had this experience, I wouldn't be where I'm at today. The move opened my eyes to lots of things and at the age of forty-some-odd-years, I feel like I finally know who I am. What a journey it's been.

By contrast, the majority of employees and their partners who used more reactive strategies had, at best, a neutral experience with relocation and, at worst, a negative experience. This fact was confirmed when the majority of those individuals indicated that they would not redo the move on the basis of their experiences. Many deemed the move as "too painful", "too problematic", and "not worth the hassle for keeping a job". Although they went a certain distance by making the move (they became braver, stronger, and more independent), their lack of effort to adjust to Calgary prevented them from coming a longer way (that is, learning more positive things about themselves and changing in a more positive way) and, as a result, many found their experience with the move to be "more costly than beneficial".

Consequently, although over time these employees and their partners resumed normal life to a certain extent, the resumption was not as complete as they would have liked. As one employee stated, “yeah, life goes on and you have to go on with it, but it’s been a rocky road since we moved and I don’t see it changing anytime soon”. In describing their lives after the move, many employees spoke of the “few highs and many lows”, “less ups and more downs”, and “a few good days followed by a lot of bad days”. Essentially, their incessant desire to return home as well as their neutral or negative assessment of their experience made for an unsteady resumption of life in Calgary. Consequently, several of them would welcome the opportunity to return to Toronto or Montréal as soon as possible (e.g., by reaching early retirement age; or the completion of the work project). Others, particularly those who moved with adolescent children, would like to return to Toronto or Montréal by a certain time but, like their lives, the departure date was also put on hold as they “wait and see what the kids decide to do”.

By comparison, given the positive experience they had with relocation, the overwhelming majority of employees and their partners who used more proactive strategies eventually resumed a “normal and steady life” in Calgary by getting into a new routine and moving on from there. As one employee said, “I kind of just kept doing what I was doing, going to work, seeing my friends on occasion, and with time life just went on, and it almost felt like I had been in Calgary all my life”. Some admitted to finding an even “better life than the one they had back home” because of what they learned and how they changed as a result of the move. As one employee stated, “I have better friends in Calgary than I ever had in Montréal, I have more confidence in my abilities than was ever

the case, and I have more money in my bank account so life's better now than it ever was". Their experience with the move was so satisfying that many of them did not particularly want to return to Toronto or Montréal for the time being. As one employee said, "If I was given an option to go back, I'd have to sit down all over again and think about it really, really hard because I love it here now and I'm not sure if I would go back". However, the purposive francophone employees and their partners, despite the fact that they used more proactive strategies to adjust to their new environment, still had, without exception, intentions of returning to Québec.

In addition to influencing their resumption of normal life in Calgary, employees' and their partner's assessments of their relocation experiences were critical in influencing their disposition towards future changes in their lives, whether in another relocation or any other major change. Where some were once reluctant to undergo change in their lives because of their unfamiliarity with the process and what they assumed to be the deleterious effects that inevitably accompanied change, those who had a positive experience with the move were now more receptive to change and appreciative of the gains to be had from change. As one employee stated, "having gone through an experience like this, I now not only know what's involved in making a change but I also know that good things can come out of it". For some, the good things that came out of relocating to Calgary were material in nature (e.g., better salary; bigger home; lower taxes). For others, they were recreational (e.g., proximity to the mountains), and still others benefited in terms of personal growth (e.g., increased confidence in oneself; increased self-esteem). For the most part, these employees and their partners were the

ones who employed more proactive than reactive strategies in their adjustment to Calgary. They learned a lot about themselves in the process and, as a result, emerged from their experience with a “greater appreciation for change and all it entails”.

In contrast, those employees and their partners who employed more reactive coping strategies and, therefore, had a more negative experience with the move as a result, did not “soften” their attitude towards change. On the contrary, their experience with relocation reinforced whatever apprehensions they had about making changes and, consequently, if they experienced any modification at all in their attitude towards change, it was that they hardened their stance on the subject. As the partner of one employee commented, “I knew I had a problem even before moving with making any major changes because of all the mess that comes with it, and after having gone through it, I’m more against making changes than ever”.

Although the data in this study demonstrate that those with positive experiences resumed a more normal life than those with negative experiences, this pattern is by no means fixed in any way. At times, even under the best of conditions and following the best of experiences, people hit a “rough patch”, which temporarily sets them off balance. By the same token, over time, following the worst of experiences, some can achieve a certain harmony with their environment and regain some balance in their lives. How this occurs and how stability can be restored goes beyond the purpose of this study. However, suffice it to say that whereas employees’ and their partner’s experiences with the move affected the resumption of their lives, this resumption is susceptible to change over time.

In sum, the assessment stage of the relocation process was a period of reflection where employees and their families found meaning in their experience with relocation by acknowledging certain things they learned about themselves and the personal changes they underwent as a result of their self-discoveries. The extent to which they adjusted to their new environment influenced in large part their self-discoveries and personal changes, which ultimately affected their assessment of their experience. Those employees who achieved a greater level of adjustment to the relocated area (thus, the permanent, flexible, and francophone Québécois purposive relocatees) discovered more positive things about themselves and changed in more positive ways as a result than those employees who achieved a lower level of adjustment (anglophone Québécois and Ontarian purposive relocatees). Consequently, the former had a more positive experience with the move and steadily resumed a more normal life than the latter whose experience with relocation was more negative and resumption of a normal life less steady as a result.

#### Passing Through the Stages of Relocation: Three Illustrations

Having identified in chapters 5,6, and 7 the main components of the relocation process and the mechanisms that link them together, what follows is a demonstration of how the relocation process works by profiling three employees through the anticipatory, familiarization, and assessment stages of relocation.

##### ***Profile #1: Darcy (Ontario)***

Darcy first heard about her company relocating to Calgary directly from her superiors who made it very clear to her from the start that she was invited to relocate but

should she decline for whatever reason that she would be assured a same-level job in Toronto. She took the company's willingness to accommodate her wishes as a compliment and, as a result, was not threatened by the impending move. She had options - she could move to Calgary, stay in Toronto, or even go elsewhere - and, therefore, perceived herself as being in control of the move and her life. She discussed the possibility of relocating with her husband who was more than supportive about the move because his professional future not only looked brighter in Calgary but, on a more personal level, he would be moving closer to his parents and siblings who lived in Edmonton. They entered the negotiating process, therefore, from an additive standpoint and pondered how the move would benefit them personally, professionally, and financially. They ultimately decided to move because it was an opportunity to be with her husband's family after having been so close to her family in Toronto all her life; the move would be beneficial for her husband who was struggling with his career in Toronto; and their quality of life would increase by moving to Calgary - a newer, cleaner, smaller, safer, more outdoorsy, and less expensive city. Moreover, the timing of the move was "perfect" for Darcy and her husband who were looking for a lifestyle change for themselves and their three young children. For Darcy, in particular, the timing could not have been better given her personal need to put some space between herself and her twin sister with whom she was very close. She had begun to feel a bit "smothered" by the twin perception of herself and needed to be herself first and secondarily a twin. Knowing how impossible that would be to achieve in Toronto with her sister being not too far from where she lived, the relocation to Calgary was an opportunity to reclaim her own space.

For these reasons, they accepted the relocation offer and moved to Calgary - a move which they perceived as being entirely their choice.

Given that their decision to move was of their own choosing, and given that they were relocating to improve their current professional and personal conditions, Darcy and her husband moved with the flexible attitude that they were coming to Calgary for as long as it suited their purposes, without self-imposing any restrictions as to the duration of their stay. Following a string of send-off parties in Toronto (e.g., neighborhood BBQ, family party), Darcy, her husband, and their children moved to Calgary and found the transition relatively easy because of their “want to be here”. They purchased the house they always wanted in Toronto but could never afford in a neighborhood that had a lot of “character”, their children quickly made friends as a result of their frequent visits to the neighborhood playground, and they quickly adapted to the “simplicity of life in Calgary”. They had a very receptive attitude towards Calgary and embraced the city for what it had to offer. Although they missed their family and friends back home, they had another family not so far away and focused their energies on what they liked about the city (e.g., the outdoorsy lifestyle, the lack of social pressure in Calgary to work long hours and week-ends). On a more social level, while they made lots of friends through their work with other relocatees, they also expanded their transitory networks to include people they met in their neighborhood and the various clubs and professional associations they joined. To expedite their “integration into Calgary life”, Darcy immersed herself in “community-related stuff” as a way of getting to know her neighbors and becoming involved in her community. She also joined two professional associations, and became involved at work

in various projects (e.g., took the lead in the United Way campaign for her company) in an effort to “embrace the new city I was now living in”. These proactive strategies helped her adjust to the relocated area very well and in a very short period of time. When asked how she would rate her adjustment to Calgary on a scale from one to ten where one was not adjusted at all and 10 was adjusted completely, Darcy’s response was “we’re in the 10s”.

Her successful adjustment to the relocated area influenced in large part what she learned about herself and the personal changes she underwent as a result of the move. In essence, she learned how empowering making a huge change can be in that she realized she had choices in life and once she gets in touch with what she wants, she can make it happen. She described her experience with the move as a “little gem” because when opportunity knocked, she took it and everything turned out for the better. As a result, she attributes her becoming more friendly and outgoing to these positive self-discoveries. Taken together, her assessment of her experience with relocation is very positive - so positive in fact that she is almost certain she will never return to Toronto.

***Profile #2: Guy (Québec)***

Guy first heard about his company’s intentions to relocate directly from his superior who informed him that the company was undergoing a major reorganization and was moving to Calgary. In the process, his superior also mentioned to him that his job was going to be abolished, he would have to apply for a new position within the company and, should he get the job, he would have to move to Calgary since they were deleting most of the jobs in Montréal. Although Guy had the option of staying in Montréal and

taking the severance package instead of relocating to Calgary, he would be left without a job. The idea of potentially being without work as a result of his company's reorganization made it so that Guy perceived to have little control over the move and, ultimately, his life. Once he was notified, several weeks later, that his bid for a certain position came through, he was relieved that he had a job even though it meant he would have to relocate to a place he did not particularly want to go. And so he entered the negotiating process from a preservative standpoint - his main and only concern being to preserve his job. Although they considered the fact that living in Calgary would invariably present some difficulties for his wife who did not speak a word of English, would have to give up a career she really enjoyed, be far away from family and friends, be separated from their 18 and 20 year-old children who would not move to Calgary, and potentially be exposed to some anti-French sentiments because of the political issue in Québec, they made the decision to move in order to maintain what they had. Guy essentially felt he was not in a position to walk away from his job for a number of reasons: he was the major breadwinner with two children in college/university and a mortgage to pay; he had devoted 22 years to the company and, with his relatively low level of education, limited skill set, and advanced middle-age, he was not very attractive to potential employers and could never command the salary he did working for another company; and living in Québec with the political and economic situation being what it was, the chances of securing another well-paying job were very grim. The timing of the move also did little to assuage Guy's reluctance to relocate. His children were both at that critical age where they could not be forced to follow their parents, yet they were both in

college/university and needed their parents' financial support. They were also both in meaningful relationships at the time which only solidified their refusal to move to Calgary. Moreover, Guy's parents and in-laws were not in the best of health and both he and his wife were the principal providers of social support in the family. However, in spite of their apprehensions, Guy and his wife accepted the relocation offer because they perceived themselves as having no choice but to move in order to preserve their livelihood.

As a result, they moved to Calgary with a temporary time-frame in mind - they were going to remain in Calgary until Guy became eligible for early retirement after which they would return to Québec. And so they kept their house in Montréal, bought a much smaller house in Calgary, and kept in constant touch with family and friends back home. They often took trips back home and counted the days until their next visit. They made friends with fellow French-speaking Québécois relocatees at work whom they met at various company-sponsored events, however, they made little effort to expand this initial network of friends for they failed to see the purpose of making more friends when they were not planning to stay in Calgary forever. As a result, they achieved a minimal degree of physical, psychological, and social settlement in Calgary. With time, however, they realized they could not continue living in this fashion. Guy's wife, who had been depressed and mourning the loss of her family, friends, career, language, and culture made the conscious decision to get out of her slump and do something about her situation. She realized before she left Québec, and her stay thus far in Calgary confirmed, that her problems in the new area would be exacerbated as a result of her cultural

background. Thus, in an effort to improve her situation and achieve a certain degree of settlement in Calgary, she enrolled in an English course. Although the course did not make her proficient in English, it did provide her with an opportunity to meet many newly-relocated people who were struggling just as she was to adjust to the city. She also applied for and got a job working for the French cultural center which provided her with yet another outlet to meet francophone people with whom she could bond. In addition, she joined the Newcomers organization in Calgary for the same purpose and, taken together, these proactive initiatives had the effect of elevating her morale and getting her to slowly adjust to the new area. Over time, they both built up a significant network of francophone Québécois friends, got out and did a lot more activities in Calgary with their new friends, and eventually sold their house in Montréal and bought a bigger home in Calgary. As a result, through their proactive efforts, they achieved a significant level of adjustment in Calgary despite the difficulties they encountered during the settling process. When asked how they would rate their adjustment to Calgary on a scale from one to ten where one was not adjusted at all and 10 was adjusted completely, their response was a definitive eight.

Moreover, through their proactive efforts, Guy and his wife learned they were tougher than they thought, adaptable, and resilient. More importantly, they learned they could adapt just as well as their anglophone counterparts. These self-discoveries, in turn, increased their level of confidence and their self-esteem. In addition, the move to Calgary also changed their perception of anglophones and English Canada. They not only viewed anglophones in a light that was more favorable than the one depicted by the media in

Québec, but they became more open, respectful, and appreciative of different cultures. Consequently, without downplaying the difficulties they experienced, they viewed their experience with relocation as positive. So positive, in fact, that if they had to redo it knowing what they know, they would do so regardless of the fact that their intentions remain to return to Québec.

***Profile #3: Tracy (Ontario)***

Tracy was informed that her company was relocating its headquarters to Calgary by her manager who point blankly told her that if she did not move, she would be out of a job. Although she was single and did not have the added responsibility of supporting a family, she had financial obligations (e.g., car loan, credit card payments) to meet and, therefore, could not afford to “pass up a good job with good benefits”. With no other options available to her, Tracy felt she was at the “complete mercy of the company”. As a result, she perceived herself as having very little control over the move and her life. She thus entered the negotiating process focused on maintaining her job, her seniority within the company, and the benefits she accumulated over the years. In her opinion, the political and economic situation in Toronto were very favorable so those factors did not in any way influence her decision to move. She seriously considered, however, her minimal level of formal education and how that would certainly cause her a huge disservice were she to look for another job in Toronto. She acknowledged how “good [she] had it with the company” and how in today’s environment she would not have been able to secure a similar paying job with similar benefits. Although the thought of moving far away from the city she grew up in and truly enjoyed being a part of caused her much

grief, her desire to maintain her job was her priority. As far as the timing of the move was concerned, Tracy was adamant about the fact that the timing for making such a change could never be good for she would never contemplate making such a move unless “her back was up against the wall” as it clearly was in this case. Consequently, she did not perceive herself as having much choice but to accept the offer to relocate if she wanted to preserve her job.

It was never a question in Tracy’s mind that she would one day return to Ontario. She moved to Calgary with the idea that her stay was simply temporary - she would put in her time until she had sufficiently upgraded her skills to secure another position in another company in Toronto. Her move was “entirely strategic” and, as a result, she had little desire to settle into a comfortable life in Calgary. She bought and moved into a condo because of the unavailability of rental units in Calgary at the time. The friends she made were solely from work and she felt no need to make any more friends because she had “plenty back home”. She had very little desire to get out and meet new people given the temporary nature of her stay in the city and, for the same reason, she had no inclination to join any clubs or professional associations unless the latter were instrumental in advancing her career. If a friend from work called her up to go out for a drink, or if she was informed of a seminar at work, then she would take part in it but she did not proactively seek out opportunities to embrace her new life and integrate herself into her new environment. As a result, she achieved a low level of adjustment to Calgary. When asked how she would rate her adjustment to Calgary on a scale from one to ten

where one was not adjusted at all and 10 was adjusted completely, her answer was “three - and that’s about as much as I plan on adapting”.

Tracy admitted to having learned how limited her degree of adaptability was as a result of the move. The biggest lesson she learned, however, was how fond and attached she was to her native city, family, and friends. Although she gained a certain degree of independence as a result of the move, she also became bitter and cynical from what she perceived as having been “forced to a certain extent” to give up her life in Ontario for the company. Her bitterness was towards both the company for moving reluctant employees away from their family and friends and herself for not having taken the opportunity in her younger years to get a more formal education. Consequently, she viewed her experience with relocation as negative. When asked if she would redo the move, knowing what she does from her experience, she would, without hesitation, have refused the offer to relocate despite the fact that she would have to struggle financially in Toronto as a result.

**CHAPTER 8****TOWARDS A GROUNDED THEORY OF RELOCATION:  
DISCUSSION AND TENTATIVE CONCLUSIONS**

The purpose of this study was to explore the relocation experiences of modern Canadian workers and their families by examining the underlying process of corporate relocation. To this end, I set about identifying some of the major components of the relocation process and the mechanisms that link these components sequentially. It was my dual intention, through this research, to: (1) fill a theoretical gap in the sociological literature which, to the best of my knowledge, had not specifically investigated the *process* of corporate relocation and; (2) explore the manner in which Canadians - a group of workers who have heretofore not been the subject of investigation in this area - experienced this major life-altering event. In addition to addressing these theoretical oversights, I hoped this study would serve the more practical purpose of highlighting the critical, and often neglected, human dimension of corporate relocation which, for the most part, has taken a back seat to the corporate logistics of relocation. The extent to which I have achieved these goals is the focus of this summation chapter, where I will discuss the theoretical contributions and implications of this study, suggest directions for future research in this area, and conclude with the practical implications of this investigation.

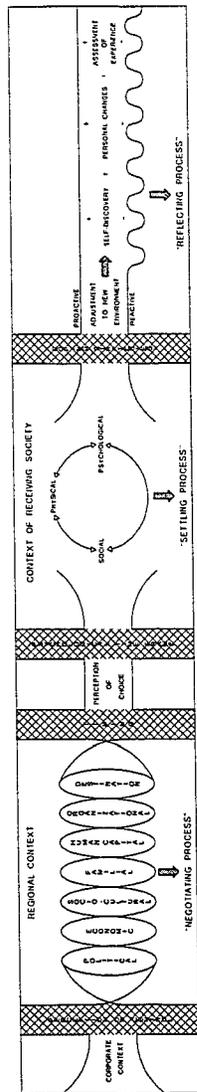
### Theoretical Contributions

#### *A Rudimentary Grounded Theory Of Corporate Relocation*

This investigation of Canadians' experiences with corporate relocation yielded some interesting results. From these observations, a substantive grounded theory of corporate relocation can be extrapolated. Perhaps the most important observation was that relocation is a highly complex, multidimensional, contextual process consisting of a sequence of events unfolding over a period of time (see Figure 4 for a preliminary overview of the relocation process). Canadians essentially experienced relocation by going through a series of interrelated stages - anticipatory, familiarization, and assessment - where their experience in one stage ultimately affected their experience in the next.

The first significant finding to emerge from the anticipatory stage of the relocation process was that the corporate context from which employees came influenced their 'perception of control' over the event. The corporate context and its influence on employees has not been examined in the relocation literature, yet this study reveals the importance of this issue. More specifically, the manner in which the company announced its plans to relocate (direct versus second-hand approach) as well as the terms of the move (non-selective versus selective offers), gave employees the perception of being more or less in control of the decision to relocate. Employees who were informed of the move directly from executives and received non-selective offers to move to Calgary perceived themselves to have more control over the event than those who via a second party heard

**Figure 4: The Relocation Process**  
*A Conceptual Framework for Studying Relocation*



of the company's intentions to relocate (e.g., the media, a friend, a spouse) and received selective offers to relocate.

Second, employees' perception of control over the event subsequently affected the manner in which they negotiated their decision to move. Although employees in this study relocated for many of the reasons mentioned in the literature (e.g., organizational, human cultural, familial), past studies have not paid particular attention to the negotiating process or how employees and their families arrived at their decision to move. This study revealed, however, that employees who perceived themselves as having more control over the event negotiated their decision to relocate from an 'additive' standpoint, meaning they made their decision on the basis of how the move would add to or benefit their professional and personal lives in terms of career advancement, future job opportunities, and/or opportunities to discover another part of the country. By contrast, employees who perceived themselves as having comparatively less control over the move negotiated their decision to relocate from a more 'preservative' standpoint, meaning they reached their decision to move on the basis of preserving what they had. That is, they based their decisions to relocate on such things as maintaining their seniority and accrued benefits in the company.

Third, the socio-political contexts from which employees originated also influenced how they arrived at their decision to move. Whereas previous research has overlooked how employees' regional contexts affect decisions to move, this study revealed that the employees' regional contexts did influence, to varying degrees, their decisions to move to Calgary. More specifically, employees from Québec not only

considered the political and economic instabilities of that province when deciding whether to move or stay behind, but these factors were, for many Québécois, significant push factors out of Québec. Therefore, in addition to moving for organizational and human capital reasons, some employees from Québec also moved for political and economic reasons.

Another critical component of the first stage in this study, rarely addressed in past studies, is the 'timing' of the move. Individuals who perceived that the timing was 'right' for a move were more likely to decide to relocate than those who felt that the timing was not optimal. This finding may help to explain some of the inconsistencies in the management literature on corporate relocation where timing of the move is not typically considered as one of the factors affecting an employee's willingness to relocate. Even if an employee is willing to relocate, poor timing may result in a refusal to accept a proposed move.

The present study revealed that while the timing of the move was not the deciding factor that tipped the scales in favor of accepting the relocation, it did affect employees' perception of choice to move. Perception of choice was a very important component of the anticipatory stage, especially in this study of group moves where the employers, not the employees, initiated the move. Although employees' perception of control over the event, coupled with their reasons for relocating, affected the degree to which they perceived themselves as having a choice to move to Calgary, the timing of the move either increased or decreased this perception. That is to say, if the timing of the move was good (e.g., children were young or old enough to handle the move; it was time for a fresh

start), it gave those employees who perceived they had a fair amount of control over the move a greater perception of choice to move. By comparison, if the timing was bad (e.g., the children were teenagers who refused to leave their friends, their partners had a great career, a parent was ill), the perception of a choice to move was reduced. Even for those who perceived themselves as having little or no control over the move, if the timing was good, it increased their perception that the move was their choice. Conversely, if the timing was considered to be bad, it decreased any perception of choice.

Taken together, the main components of the anticipatory stage (corporate context, perception of control, negotiating process, timing, and perception of choice) underscore the importance of context and employees' perceptions and motivations *vis-à-vis* the life event in question. Given that our experiences are based on how we perceive our situation and our social context, this finding is hardly surprising. Moreover, given the interdependency of the stages of the relocation process, one must carefully consider the components of the first stage to fully appreciate and comprehend employees' experiences in the second stage of the relocation process. By and large, previous researchers in this area have bypassed this critical first stage and focused exclusively on the second stage (the period of arrival in the new environment). Consequently, their studies have lacked the contextual grounding necessary to properly assess employees' experiences with corporate relocation. Hence, the findings that emerged from this first stage of the relocation process are both informative and indicative of the importance of paying attention to context and perception in future studies of relocated employees.

Employees' experiences during the second or familiarization stage of the relocation process also revealed some interesting findings. First, the issue of 'stress' was a recurrent theme in this stage. Even under the best of conditions, relocation was found to be stressful for employees and their families. This finding is not surprising and is consistent with previous empirical research on corporate relocation (e.g., Anderson & Stark 1985; Gullotta & Donahue 1981; Harvey 1985; Munton 1990; Munton & Forster 1990; Vanhalakka-Ruoho 1994). However, unlike previous research, this study identified the degree of stress experienced by employees and their families as a result of relocation. The findings indicated that stress was, (1) inconsistent; (2) variable; and (3) non-perpetual. In other words, certain periods during the relocation process were less stressful (e.g., honeymoon period) than others (e.g., settling process). Employees who perceived themselves as having had more of a choice to move experienced comparatively less stress than those who perceived themselves as having had less of a choice. And, after a certain period of time (usually towards the end of the familiarization stage), the stress experienced by many employees and their families as a result of the move subsided and eventually dissipated.

The second significant finding to emerge from the familiarization stage of the relocation process was that employees' perception of choice to move influenced their psychological time frame or their predetermined length of stay in the new environment. More specifically, employees who perceived themselves as having had more of a choice to relocate were more likely to move to Calgary with the intention of either remaining permanently or remaining at least for as long as it suited them. By contrast, employees

who perceived themselves to have had less of a choice to relocate were more prone to move to their new destination with the intention of remaining temporarily and then returning to their original place of residence.

Third, in addition to employees' perception of choice to move, the region from which they originated also seemed to influence certain employees' psychological time frames. In other words, employees' predetermined length of stay was partly conditioned by their region of origin. More specifically, in comparison to their anglophone counterparts in both Québec and Ontario, francophone employees from Québec were more likely to move to Calgary temporarily, irrespective of their perception of choice to relocate. The data indicated that francophones from Québec, whose language and culture differed from the prevailing language and culture in Calgary, were less likely to want to move to Calgary permanently.

Fourth, employees' psychological time frame subsequently affected the manner and extent to which they settled in their new environments. In essence, employees who relocated to Calgary either permanently (permanent relocatees) or on a more flexible basis (flexible relocatees) approached their physical, psychological, and social settlement in Calgary with a more "leave-the-past-in-the-past-and-look-to-the-future" attitude and, as a result, settled to a greater extent than those employees who moved temporarily (purposive relocatees). For example, permanent and flexible relocatees physically settled by buying a house they liked, renovating and decorating their home to their liking, and proceeding to turn their house into a comfortable home. In contrast, employees who

moved to Calgary temporarily chose to rent instead of buying a house, or bought a particular type of house that was easily re-sellable.

Employees' psychological time frame also affected their psychological settlement. Generally, employees who relocated temporarily experienced more difficulties coming to terms with the move than their counterparts who relocated with intentions of staying permanently, or at least until leaving suited their purposes. Whatever their psychological time frame, it is important to mention that similar to the findings of previous studies (e.g., Luo & Cooper 1990; Martin 1996; Munton 1990; Seidenberg 1973), all employees and their partners did experience some level of stress. The losses (e.g., of family, friends, job) incurred by employees and their families as a result of the move made psychological settlement in the new area a difficult task.

However, depending on their attitudes, which were largely conditioned by their psychological time frame, some employees and their partners achieved a greater degree of psychological settlement than others. Permanent and flexible relocatees who felt that they were in Calgary to stay metaphorically turned the page and started a new life. As a result, they eventually made peace with the move to a greater extent than those employees who relocated with intentions of only remaining temporarily. The latter relocated with the assumption that their days in Calgary were numbered and, therefore, lived out their lives by the calendar, essentially putting in time before they could return to Montréal or Toronto.

Consistent with previous research on the psychological settlement of the displaced (e.g., Bayes 1989; Butler, McAllister & Kaiser 1973; Martin 1996), the partners (usually

female) of employees encountered more difficulties settling psychologically than employees. The partner's difficulties stemmed from feelings of isolation in the new environment (*c.f.* DeCieri, Dowling & Taylor 1991; Weiss 1969), loss of social networks (*c.f.* Bayes 1989; Seidenberg 1973), loss of personal identity (*c.f.* Weiss 1969), and lack of continuity in the relocated area (*c.f.* Tiger 1974). However, my findings clearly diverged from those of several researchers (e.g., Cardwell 1980; Gaylord 1979; Hooker 1972; Weissman & Paykel 1972), who found that women's lack of perceived control in the decision to relocate was one of the most influential factors affecting their psychological maladjustment to the relocated area. On the contrary, the distressed partners of the employees in this study had been equally involved in the decision-making process to move, and often the move would never have transpired without their consent.

My findings also stood in sharp contrast to the popularized image in the literature of the partners of employees (or the 'trailing spouses' as they are called) as the helpless, dependent, clinically depressed, neurotic, alcoholic victims of corporate relocation (Seidenberg 1973; Weiss 1969; Weissman & Paykel 1972). Although some confessed to being somewhat depressed for a while and even resorting to some rather strange behavior as a result, these women by and large came out of their depressive states, without bearing any psychological scars. Like Brett (1982), who in her survey analysis of 500 employees found that the prevalent portrayal of the victim-wife was not only unsubstantiated but hyperbolized, my study revealed that as difficult as it was for many of the partners to make peace with the move for the reasons mentioned above, with time and through the use of various coping strategies, they came to accept the move. Moreover, many of them

emerged from their experience feeling stronger, more confident, and somewhat empowered as a result of their accomplishments in the new environment.

With regards to social settlement, permanent and flexible relocatees achieved a higher degree of social settlement than their purposive counterparts. Employees that moved with permanent and flexible psychological time frames were more inclined to get out and socialize in comparison to those who moved with temporary time frames. Employees who felt that their time in Calgary was limited were more likely to stay close to home and stick to themselves.

As difficult as it was for all relocatees to adjust to a new milieu and to make new friends, French-speaking employees from Québec, and particularly their partners who spoke no or very little English upon their arrival in Calgary, had an especially difficult time settling socially because of their different language, culture, and socio-political and religious ideologies. Francophones from Québec felt largely displaced in Calgary as a result of, (1) the “Englishness” of Calgary, (2) their detectable French accent, (3) their perceptions that Anglo-saxon Westerners were stereotypically more conservative, antiquated, and “redneck”; and (4) their newly-gained minority status. These findings were similar to Breda Gray’s 1996 examination of relocated Irish women in London in which she found the experience of relocation to involve varying degrees of anomie or displacement.

Finally, the extent to which employees and their families emerged from the settling process and adjusted to their new environment was contingent upon the coping strategies they used to deal with the changes in their lives. Research in the past has

largely ignored the tactics used by employees to facilitate their adjustment to the relocated area. However, this research found that employees essentially used one of two strategies: (1) proactive strategies which consisted of initiatives enacted specifically to help them get through the settling process, and (2) reactive strategies which consisted of letting things unfold in their own time and way.

While purposive relocatees were found to use reactive strategies to a greater extent than proactive strategies, the permanent and flexible relocatees were more likely to use the proactive strategies. As a result, the latter adjusted significantly better to the new environment than the former. The proactive strategies used by the permanent and flexible relocatees to facilitate and expedite their adjustment to Calgary included consulting self-help books; enrolling in computer, language, and exercise classes (self-improvement tactics); doing something they always wanted to do but never got around to doing (e.g., going back to school for a degree, losing weight); joining various clubs, organizations, associations (e.g., Newcomers); taking up old leisure activities (e.g., gardening, tennis, and golf); and taking up new leisure activities (e.g., bridge, wood carving, and crochet). These activities helped employees and their partners to settle into their new lives by providing opportunities to learn something new and meet new people as well as keeping them busy.

An exception to this discernible pattern between employees' psychological time frame and their use of coping strategies was that French-speaking, purposive employees and their partners from Québec were more likely to use proactive strategies instead of reactive strategies in their adjustment to the relocated area. This group of francophones,

aware of the potential difficulties they were likely to encounter in the relocated area because of its different cultural environment, made more of an attempt to minimize the impact of relocation. Although they used proactive strategies similar to those mentioned above, they supplemented these activities by forging a tightly-knit social network in Calgary consisting of fellow Québécois (whom they met through various informal organizations, work, their children's schools) which served as a huge source of social support and allowed them to maintain their francophone identity in Calgary. Unlike Gray's (1996:24) Irish migrants in London who felt threatened by the loss of their "cultural back-up networks", the Québécois migrants in this study felt no such threat, given that they recreated their cultural back-up networks in Calgary. As a result, in comparison to their anglophone counterparts from both Québec and Ontario, francophone employees and their partners from Québec adjusted just as well to Calgary, irrespective of their psychological time frame and the difficulties they encountered in the settling process.

Taken together, the main components of the familiarization stage (psychological time frame, settling process, proactive/reactive coping strategies, and adjustment to new environment) highlight the importance of attitude and action in achieving successful adjustment to the relocated area. Given that our actions are considered to be reflective of our attitudes, the former cannot be assessed without examining the latter. Yet past research on this topic has devoted little time to exploring this critical relationship. As mentioned earlier, the vast majority of studies have depicted relocation in the most negative light - as a psychologically devastating life event (especially for the employee's

partner) - without pondering the manner and extent to which employees' and their partner's attitudes towards the move influence not only how they go about settling in and adjusting to their new environment but subsequent stages of the relocation process as well.

The degree to which employees and their partners adjusted to the new environment during the assessment stage greatly influenced their overall assessment of their experience with corporate relocation. More specifically, employees who used more proactive strategies discovered more positive things about themselves and changed in more positive ways as a result of those discoveries. The combination of these positive self-discoveries and personal changes resulted in a more favorable impression of the relocation. In turn, this attitude helped employees and their families resume a stable life in the relocated area. In contrast, employees who used more reactive coping strategies did not experience a successful process of self-discovery and change. Consequently, their experience with relocation was neutral at best, or even negative and their resumption of normal life in the new environment was less complete than that of their proactive counterparts.

Overall, despite their incurred losses, for many employees and their families (particularly the ones who employed proactive strategies), their experience with job relocation was not as horrific as some past researchers (e.g., Anderson & Stark 1985; Seidenberg 1973; Weissman & Paykel 1972) have suggested. On the contrary, and consistent with Brett (1982), Levin, Groves & Lurie (1980), Mann (1973), and Pihl & Caron (1980), my findings indicated that relocation can be an invigorating experience

filled with many challenges and opportunities to start anew, try different things, see different places, meet different people, and finally get around to doing things that have been sitting on the back burner for some time.

It is important to note that this positive assessment was as true for the partners of employees as it was for the employees themselves. In contrast to the literature's dismal portrayal of the employees' partners as "corporate casualties" of relocation (e.g., Seidenberg 1972), this study revealed, like Jones' (1973) work on relocated American women, that the majority of employees' partners were far from being the victims of job relocation. On the contrary, despite the hardships they endured as a result of losing family, friends, jobs, and their personal identities, they derived just as much and, in some cases, more satisfaction from their experience with relocation than the employees.

As the findings from this last stage indicated, much of the satisfaction that employees and their partners derived from their experience with the move came from the positive self-discoveries and personal changes they experienced as a result of the move. Among some of the discoveries employees and their partners made about themselves were how gutsy, tough, adaptable, tenacious, resilient, ambitious, and resourceful they were. Even among those employees who used mostly reactive strategies and, as a result, discovered fewer positive things about themselves, they too, discovered how courageous and tough they were as a result of their experience. They also learned they were unable to let go of the past, were homebodies more than adventurers, and were not as adaptable as they thought they were. Nonetheless, many of them emerged from their experience somewhat stronger, braver, and more independent. However, while those employees who

used mostly proactive strategies also became more spontaneous, self-directed, confident, and empowered as a result of the move, their reactive counterparts often became more withdrawn and fatalistic.

This last stage of the relocation process also revealed that, the majority of French-speaking employees from Québec, by virtue of moving to a culturally different environment, gained some additional insights about themselves as a result of their experiences with the move. By and large, they discovered they were: (1) capable of “fitting in” in Calgary despite their cultural differences; (2) as competent at adapting to Calgary as their English-speaking counterparts who moved from Québec and Ontario; and (3) capable of integrating into Albertan society without assimilating to the anglophone majority. Moreover, they became culturally richer; more tolerant of cultural, linguistic, political, and social differences; and more open-minded about English Canada and English Canadians.

In essence, the findings in this study indicated that French-speaking Québécois employees and their partners attached a different, and more profound, meaning to the move. For many, relocating to Calgary reaffirmed that they were not in any way inferior to the anglophone majority. In addition, it made them aware of the extent to which their culture and, hence, their identities were transportable irrespective of any political rhetoric to the contrary. Consequently, the move to Calgary signified a personal and social victory for many Québécois.

### *Concluding Remarks*

In sum, given that this study is the first of its kind to be conducted, this theory is rudimentary and, therefore, more research on this topic needs to be done to develop a full-blown theory of corporate relocation. In the meantime, it would appear from the data and the conceptual framework (Figure 4) that emerged from that data, that the manner in which employees and their partners experienced relocation was dependent on their perception of control over the move. That is to say, employees and their partners who perceived themselves as having more control over the move were more likely to adjust successfully to their new environment and have a better experience with relocation than employees and their partners who perceived themselves as having less control over the move.

Employees' perception of control over the move influenced not only the manner in which they negotiated their decision to relocate but also their perception of choice to move, their psychological time frame, the manner in which they settled in the new area, and the coping strategies they employed to facilitate their adjustment to the new environment. Briefly, employees who perceived themselves as having more control over the move approached their decision to relocate largely on the basis of how the move would add to their lives which subsequently gave them more of an impression that the move was their choice. Given that they perceived themselves as having more of a choice to move, they were more likely to relocate with a permanent or flexible time frame in mind which invariably influenced their settling process. Permanent and flexible relocatees, by and large, achieved a greater degree of physical, psychological, and social

settlement because they were more likely to approach their settlement in the new area with a positive attitude. While having a good attitude was important, permanent and flexible relocatees were also more likely to facilitate and expedite their adjustment in the relocated area by utilizing proactive strategies. As a result, these employees discovered more positive things about themselves, which changed them in more beneficial ways. Because of these positive discoveries and changes, they were more likely to assess their experience with relocation as positive.

In contrast, employees who perceived themselves as having less control over the move approached their decision to relocate as a way of preserving what they had, which subsequently gave them the impression that the move was not entirely their choice. Given that they perceived themselves as having less of a choice to move, they were also more likely to relocate with a temporary time frame in mind, which invariably influenced their settling process. These purposive employees, for the most part, attained a lesser degree of physical, psychological, and social settlement, because they were more likely to approach their settlement in the new area with a less than positive attitude. In addition, purposive employees were more likely to utilize reactive strategies in adjusting to their new area. As a result, these employees discovered fewer positive things about themselves, which resulted in either little personal change or negative personal change. The combination of these limited self-discoveries and changes meant that these individuals were more likely to assess their relocation experiences as neutral or negative.

It would also appear from the data that the regional context from which employees and their partners originated played a significant role in the manner in which

they experienced relocation. Depending on their region of origin, some employees and their partners considered additional factors (e.g., political, economic) when deciding whether to accept the relocation offer. These structural constraints, in turn, gave them the impression of having somewhat less of a choice to relocate, which then affected their settling process. However, as the data also revealed, employees and their partners who anticipated having certain problems in the relocated area as a result of their language and cultural background (e.g., the francophone Québécois employees in this sample), were more likely to compensate for their diminished choice by adopting proactive coping strategies to adjust to their new environment. Thus, they attained levels of adjustment in the relocated area comparable to other employees and their partners who had moved from cultural environments similar to Calgary and, therefore, had not anticipated problems in the new area.

Overall, it may be possible to apply these tentative generalizations to similar relocation situations in Canada. However, as was stated earlier, the theoretical understandings which have emerged from this study are considered to be preliminary. To move towards the ultimate goal of a more fully developed grounded theory of corporate relocation, further exploratory studies are required.

#### Theoretical Implications

In addition to the aforementioned theoretical contributions of this research, the findings of this study also tie into and elucidate some of the broader sociological concepts found in the symbolic interactionist/social psychological, identity, and social support

literature. For instance, employees' perceptions of control over the move and choice to relocate and the manner and extent to which these perceptions influence their adjustment to the relocated area tie into one of the main principles of symbolic interactionism and social psychology (i.e., definition of the situation) which states that "in addition to a physical objective reality and a social reality, each individual, because he or she sees the world uniquely, has an individual, personal reality" towards which he or she acts (Charon 1992:38). Thus, irrespective of the objective reality in which corporate relocation took place - namely, the companies in question being in control of the move and the employees having a choice to accept or refuse to relocate - the individual realities of employees and their families, as they perceived them to be through interaction with people in the corporate context from which they came and the regional contexts in which they lived, affected their behavior and ultimately how they experienced the relocation process. Hence, the findings of this research lend credence to the dominant view espoused by symbolic interactionists and social psychologists that the actor's behavior is reflective of his or her perception of the situation or circumstance in which he or she is called to act.

In addition to the importance of people's perceptions or definitions of the situation on their actual behavior, the findings of this study also highlight the influential role that attitudes play on individual behavior. Perhaps the most important concept examined in social psychology has been attitudes which researchers have conceptualized as an individual's set of beliefs or feelings toward an object or event that predisposes him or her to act in a certain manner when confronted by that object or event (Aronson 1984; Rosenberg & Turner 1981). The results of this research indicate that employees' attitudes

toward the move, as conveyed by their psychological time frame, largely affects the manner in which they settle physically, psychologically, and socially in their new environment.

The social psychological concept of identity is yet another salient issue that has grown central to current sociological discourse and which emerges from this study among the French-speaking employees and families from Québec. Identity, identity salience, and the link between identity and role performance as discussed by a number of social psychologists (e.g., Burke & Reitzes 1981; Callero 1985; Stryker 1968; Weigert 1983) have their application in this research. The findings of this study indicate that the majority of French-speaking Québécois were not only committed to maintaining their francophone linguistic identity in the relocated area (as evidenced by their efforts to speak French in the home, create a network of French-speaking friends) but were also as equally committed to embracing a bilingual identity in a unilingual, English-speaking environment. Their bilingual and bicultural identities, in a postmodern sense, were not unidimensional and undifferentiated but rather multidimensional and multifaceted. More importantly, by adopting a bilingual identity, their francophone identity was not diminished as a result. On the contrary, their identities were fluid, interchangeable, and situational so that, depending on the situation one faced (i.e., the pursuit of leisure activities with the family), a given identity (i.e., francophone identity) was invoked. Thus, in terms of identity salience, the findings reveal that while their bilingual identity was more salient when pursuing a public function (e.g., work, shopping), their francophone identity became more pertinent in the private realm of family functions, leisure pursuits,

and social gatherings and the fluidity of their identities made it such that they easily invoked one identity over the other as the situation changed.

The critical role of social support during the relocation process is undeniably one of the most prevalent themes that emerged from this research. Researchers working in the area of social support (e.g., Cobb 1976; Sutor, Pillemer & Keeton 1995; Lin, Woelfel & Light 1985; Thoits 1995; Wethington & Kessler 1986) have conducted a number of studies on the "buffering effect" of social support subsequent to important life events such as divorce, death, and chronic illness and have found that both formal and informal sources of social support - whether received or simply perceived as being available for use - helped alleviate the deleterious effects of stress induced by the event and facilitated adjustment to the stressful event. Corporate relocation was perceived by all employees and their families as a stressful life event and the most influential mediator of their stress was their social network of acquaintances and friends.

More specifically, employees and their families revealed to have found solace from people they hardly knew but who had already experienced or were currently going through a similar transition. This finding provides support for Thoits' (1986) and Sutor, Pillemer & Keeton's (1995) contention regarding the importance and effectiveness of "experiential similarity" (e.g., having experienced a similar status transition) in dealing with emotional and psychological stress following a major life event. Moreover, given that the people who made up these transitory networks of colleagues going through a similar experience were essentially strangers (who subsequently became friends or remained acquaintances), the findings from this research tie into Granovetter's (1973;

1982) claim that “weak interpersonal ties” can be just as strong or “indispensable” sources of social support as “strong ties”.

Hence, as this section made clear, the study of corporate relocation - a major life event that involves the geographical displacement of employees and their families and, thereby, necessarily affects people’s assumptive worlds - invariably touches on social psychological issues of situational context, identity, and social support. Although some of the ways in which the findings from this exploratory research tied into these social psychological concepts have been discussed, future research in this area can be designed exclusively around one or a combination of these concepts for a more profound elucidation of these issues as they relate to corporate relocation.

#### Directions for Future Research

Although there are undoubtedly many questions and ideas that remain to be investigated, this study provides a springboard for future research on the issue of corporate relocation in Canada. The next step would be to follow-up on this preliminary investigation of how Canadians experience this major life event by examining, in “concatenated” (Stebbins 2001) fashion, other Canadians who have relocated for work, from various regions in Canada, to different places, and under different circumstances. As investigation on this topic grows or, as Stebbins (2001:14) would say, “as data accumulate across the chain of exploratory studies”, our grounded theory of corporate relocation will also grow in “detail, breadth, and validity” and, therefore, in applicability.

To this end, future sociological research could explore the manner and extent to which employees' region of origin affects their relocation experience by examining, for example, the relocation experiences of employees from Atlantic Canada who have moved to culturally different environments such as Western Canada or Central Canada or, conversely, employees from Western and Central Canada who have moved to Atlantic Canada for work. Through this type of research, we can gain a better understanding of how regionalism and regional identities in Canada influence the way Canadians experience major life events such as corporate relocation.

In addition to domestic relocations, future research can also look at the experiences of Canadian employees and their families abroad. Such research could provide information about how Canadians negotiate their decision to move to another country, settle in a foreign environment, and adapt to the relocated area. Moreover, the results from such studies could provide interesting comparisons with Canadian employees' domestic experiences with corporate relocation.

Another possible direction for future research is to examine alternate types of corporate relocation. To supplement this research on group moves, future researchers should look at individual job transfers - both employer-initiated job transfers and employee-initiated job transfers. By exploring and comparing the experiences of those employees who relocated individually at their own request or that of the company's, one can refine and elaborate the main components of the relocation process (particularly that of 'perception of control') and the underlying mechanisms that link them together.

Ultimately, concatenated studies on corporate relocation could culminate with a well developed substantive theory of the relocation process. Researchers could then apply the main ideas from this substantive theory to other major life events (e.g., serious illness; divorce) with the goal of developing a more general theory of adaptation to life events. For the sake of argument, this general theory of 'event appropriation' could be based on the general premise that individuals dealing with major life events who perceive they are in control of the event in question are more likely to adapt successfully than those who do not. Hence, from a rudimentary grounded theory of corporate relocation, we can, through concatenation, develop a substantive theory of relocation and subsequently broaden the scope of research and apply these ideas to life events more generally, ending up with a formal theory of how people experience life events. Therefore, it is possible that this study is the first link of what could be a very long chain in the research process, provided we as researchers are ambitious enough to see it to the end.

#### Practical Implications of this Study

Although corporate relocation is a major life-altering event for the employees and families involved, for the companies that initiate, coordinate, and oversee the geographical displacement of employees and their families, relocation is, above all, a logistical enterprise. Hence, it is no wonder that the human element of corporate relocation - its employees and their personal needs - has often been lost in the shuffle of figures, quotes, appointments, and meetings surrounding the physical move. Through this research, I have attempted to uncover the human aspect of corporate relocation. If a

company's viability and success are dependent on its employees, and if the axiom that 'a happy employee is a productive employee' is true, then logic would dictate that paying closer attention to the human side of corporate relocation would benefit the employees and, ultimately, the company.

This study invariably touched on some of the corporate problems that have undoubtedly marred employees' and their families' relocation experience. To the extent that these problems are fixable and future employees can benefit from these changes, my research will have made a practical contribution. However, to give credit where credit is due, employees and their partners were, on the whole, quite pleased with the way their company "handled the move". Nonetheless, some employees suggested various things the company could have done or services it could have offered which would have facilitated their transition. After completing a study like this, I would be remiss if I concluded without addressing their recommendations. Therefore, following a few recommendations of my own that emerged from this research, I will present their suggestions.

#### ***Personal Recommendations***

Based on the findings that emerged from this study, my recommendations for developing a more employee-friendly and, therefore, more efficient and cost-effective solution for relocating employees and their families, are the following:

- (1) In the case of group moves, inform employees *directly* by whatever means possible of the company's intention to relocate (e.g., calling a general meeting).
- (2) To the extent that it is possible, issue *non-selective offers* rather than selective offers.
- (3) To the extent that it is controllable, strategically *time* the announcement of the company's intention to move so that employees

are not informed of the move prior to any major holidays (e.g., Christmas, Easter).

- (4) Provide on-site *counseling* (e.g., using psychologists, family therapists, social workers) help employees and their families come to terms with the move during the settling process.

As this research revealed, the corporate context in which employees were notified of the company's plans to move largely influenced employees' perception of control over the move which subsequently affected their relocation experience. To ensure that employees have the most positive experience with the move, employers should, to the extent that they can, give employees the impression that they, and not the company, are in control of the move. They can do this by informing the employees directly of the company's plans to relocate by calling a general meeting of all concerned employees. This direct approach will eliminate, or at the very least, minimize any suspicion on the part of employees that the company is being dishonest with them. Also, for the same purpose, they should, to the extent that they can, offer non-selective instead of selective offers. This would give employees a more favorable impression of the move, not to mention minimizing the chances of them seeing the company as being unfair or as giving preferential treatment to some employees over others.

In addition, employers should try as much as possible to refrain from announcing the company's intentions to relocate during and around major holidays like Christmas and Easter. Relocation is a life-changing event and, as a result, contemplating a move of this magnitude can be quite stressful for most people. Announcing the company's plans to relocate prior to the holidays can, therefore, put a damper on the festivities.

Although most of the companies were good about providing counseling services for employees and their families prior to the actual move, these services were not provided in the relocated area. As the findings on the settling process indicate, psychological settlement was difficult for a number of families. Thus, the availability of on-site professionals to help them make peace with the move could facilitate their psychological settlement in the new area.

#### *Employees' (and Partner's) Recommendations*

In addition to my recommendations above, some employees and partners also made suggestions on the basis of their personal experiences with the move. Their recommendations were the following:

- (1) Allow a *reasonable time frame* (e.g., at least four weeks) for deciding whether to accept the relocation offer.
- (2) Provide on-site *employment placement agents* to assist partners of employees find suitable employment in the relocated area.
- (3) Provide on-site *relocation counselors* to consult employees and their families on what to expect from corporate relocation, what people's experiences with relocation have been, what to expect in the relocated area.
- (4) Provide on-site day-care facilities for employees with young children.
- (5) Allow a reasonable time frame (e.g., at least one week) to look for *accommodations* in the relocated area.
- (6) Make *special allowances* (e.g., in the case of sick parents, death in the family) to cover all or a portion of the cost for a return-trip home.
- (7) Offer a reasonable number of hours (e.g., at least eighty hours) of *English-language instruction* for employees and/or partner and children (if applicable).

In conclusion, while we can certainly make suggestions for improving people's experiences with corporate relocation either as researchers through our research, or as employees through experience, there are no guarantees that if we meet all the criteria for a successful relocation experience, that the experience will be positive. To quote a person

who has been in the relocation industry for quite some time and who has consulted a number of relocated employees and families on this subject: "One's experience with relocation depends on what he does with it". As a sociologist, I was curious to know what sixty-three employees from Québec and Ontario did with their experience, and if these experiences could help others relocating in the future. The insights gained from this examination of the relocation experience not only satisfied my intellectual curiosity but also provided theoretical and practical considerations for an event many of us may deal with during our lives.

## ENDNOTES

- <sup>1</sup> There is a trend in Canadian corporations whereby headquarters within a province have a tendency of being concentrated outside of the provincial capital. The most notable exception to this is Toronto, as well as Winnipeg, although the latter is not a sizable corporate center nationally. This is true of Victoria and Vancouver, Québec City and Montréal, Regina and Saskatoon, as well as Edmonton and Calgary. A plausible explanation for this tendency of corporations to set up headquarters outside the provincial capital is the perception that non-capital cities are prone to a more free enterprise, laissez-faire mentality when it comes to business. In other words, they are more entrepreneurial in spirit and less dependent on politics and government (Hirsch 1993:28).
- <sup>2</sup> The terms Québécois and Québécoise are used interchangeably to refer to people from Québec. However, given that English-speaking people from Québec are more likely to refer to themselves as Quebecers and that French-speaking people are more likely to refer to themselves as Québécois, I used Québécoise and Québécois to refer to anglophone and francophone people from Québec, respectively.
- <sup>3</sup> As interesting as this may be, there is no explanation as to why employees from Québec were more willing to be interviewed at home with their partners than those from Ontario. One can venture a guess and say that the reason is cultural.

Another possible explanation may be that the relocation experience was more profound for those having moved from Québec for various reasons and, as a result, the motivation behind having the interview at home and allowing the partner to participate, was more therapeutic than anything else.

<sup>4</sup> The interviews that were conducted in French were transcribed in that language, however, the quotes from those interviews that figure in the text have all been translated by me.

<sup>5</sup> Pseudonyms were used to protect the identity of the participants. In order to differentiate the anglophone employees from the francophone ones, English names were given to English-speaking employees and their partners, and French names were assigned to the francophone participants.

<sup>6</sup> There was only one employee in the sample who was identified as a 'transient relocatee', therefore, this study will focus specifically on the permanent, flexible, and purposive relocatees. I would suspect that the reason transient relocatees are absent from this particular sample of corporate transferees is that transient relocatees are more likely to be found among individual transferees as opposed to group-move transferees. While group-move transferees are usually, but not exclusively, one-time movers, transient relocatees are typically those employees who ask for and get transferred several times during the course of their careers for

personal gains or career advancement or both. They are dubbed “corporate jet-setters” in the literature, specifically because they are always on the move with their jobs.

<sup>7</sup> These social events were insular at first, meaning they included only francophones from Québec. However, as time went on and some Québécois employees and their families began to include non-francophones in their network of friends, these social events began to include others.

<sup>8</sup> Several francophone respondents employed the term “foreign” when referring to western Canadian culture. The fact that they perceived the province of Alberta and the culture out west to be drastically different from the province of Québec was also rendered evident in their frequent reference (whether they were conscious of it or not) to Alberta as a ‘country’ instead of a ‘province’ or ‘region’ in Canada.

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**APPENDIX 1: Interview Guide for Semi-Structured Interviews**Personal Characteristics and Background Information About the Participant

- 1) Where were you born and raised?
- 2) Tell me about your family. How many siblings do you have? Are you close to your family? Were your parents born and raised in Québec/Ontario? Do you your siblings live in Québec/Ontario?
- 3) Did you attend French or English school? (Education history)
- 4) Did you ever study outside your province of residence? If so, why?
- 5) Was education valued while you were growing up? Did your parents stress the importance of education?
- 6) How do you identify yourself in relation to your province of residence? Do you identify more with your province of residence/region or Canada in general? Why?
- 7) On the political spectrum ranging from very Conservative to very Liberal, where would you locate yourself?
- 8) How do you identify yourself? Which of these identities is the most important for you? Which is the least important?
- 9) What are your main priorities in life? (e.g. work, family, friends, money...)
- 10) How different are you from your parents on the following points:
  - a) level of education
  - b) social class standing
  - c) political affiliation (Liberal, Conservative, NDP...)
  - d) religious observance

- e) language proficiency
- f) ambition
- g) travel
- h) social tolerance for special interest groups (e.g. women, Aboriginals, visible minorities, same-sex couples)

11) Who or what is your main source of social support? (e.g. family, friends...)

12) Do you consider yourself to be loyal to your employer? A workaholic?

#### Prior to Relocating to Calgary

- 1) Can you explain the context within which your employer asked you to relocate to Calgary?
- 2) What was your immediate reaction to your employer's offer to relocate to Calgary?
- 3) What were your perceptions of Calgary?
- 4) What were your perceptions of the socio-political context of Québec/Ontario prior to moving to Calgary?
- 5) Who was the first person you told about the relocation offer? How did that person react? How did your immediate family react? How did your close friends react to your departure?
- 6) What made you decide to relocate to Calgary?
- 7) Do you feel you had a choice to accept or refuse the offer to relocate?
- 8) Did anyone or anything in particular influence your decision to leave Québec/Ontario?
- 9) Was this your first corporate relocation?

- 10) What was your company prepared to do to assist you in your departure?
- 11) What were your main concerns about leaving your home?
- 12) What were your main concerns about relocating to Calgary? What were your partner's concerns? What were your family's concerns? What did you do about those concerns?
- 13) How did you prepare yourself, physically, to leave Québec/Ontario? How did you prepare yourself, mentally or emotionally?
- 14) What did you think you would miss most about Québec/Ontario?
- 15) Had you ever been to Calgary prior to relocating to the city?
- 16) Was the relocation lateral?
- 17) Did you leave Québec/Ontario with the impression that this was a permanent move?

#### Upon Relocating to Calgary

- 1) On what date did you relocate to Calgary?
- 2) Upon arrival to Calgary, what were your initial impressions of the city?
- 3) Did you feel like a stranger in Calgary? If so, what do you think made you feel that way?
- 4) Did you get a culture shock when you came to Calgary?
- 5) How did you find the transition from Québec/Ontario to Calgary?
- 6) In which neighborhood did you move? Describe the neighborhood.
- 7) Do you like your house? Is it an upgrade?
- 8) What did the company do to make your transition easier?
- 9) What did you find stressful about the move?

- 10) Do you like Calgary?
- 11) How does it differ from your original place of residence?
- 12) Have you established a social network in Calgary? How did you do it? How long did it take you to establish relationships in Calgary? Friends at work? Are your friends anglophone/francophone? Are your friends from work?

After Relocating to Calgary

- 1) Have you joined any clubs/ organizations since you relocated to Calgary?
- 2) Do you find that you have changed since having moved to Calgary? If so, in what ways? Are you comfortable with those changes? Has your personal relationship changed?
- 3) Do you think you will ever return to Québec/Ontario permanently?
- 4) Now that you are in Calgary, how do you feel about Québec/Ontario?
- 5) Has your work ethic changed since you've moved to Calgary?
- 6) Do you follow the news about the current state of affairs in your original province of residence?
- 7) Do you feel that you have adapted to Calgary? How long would you say it took you to adapt to Calgary? How well would you say you have adjusted to Calgary?
- 8) Looking back at your experience and knowing everything you know, if you were given the option to relocate to Calgary, would you accept the offer this time around?
- 9) Would you change anything? If so, what would you change?
- 10) What did you learn about yourself from this whole process?
- 11) Do you feel any guilt or responsible for having moved the family to Calgary to follow

your work?

12) Is your life better now that you're in Calgary? If so, how is it better?

13) Do you know people who refused to relocate to Calgary? Why do you think they refused?

14) Do you know people who came out to Calgary and then returned to Québec/Ontario? Why do you think they went back?

15) What advice would you give someone who's thinking of relocating to another city/province? Would you encourage the move?

**Survey Questionnaire**

The following questions are in addition to the interview we just completed. Responses to these questions will provide me with some background information that may be used in the final analysis of the research project. Please answer the questions by placing a check (✓) next to the appropriate response. Thank you.

1. Gender: Male \_\_\_ Female \_\_\_
2. Date of birth (year/month/day): \_\_\_\_\_
3. What is your ethnic/linguistic background?  
French \_\_\_  
British \_\_\_  
Other (please specify) \_\_\_\_\_
4. What province in Canada were you born in?  
Québec \_\_\_  
Ontario \_\_\_
5. What is your average annual income?  
Less than \$25,000 \_\_\_  
\$25,001-\$29,999 \_\_\_  
\$30,000-\$39,999 \_\_\_  
\$40,000-\$49,999 \_\_\_  
\$50,000-\$59,999 \_\_\_  
\$60,000-\$69,999 \_\_\_

\$70,000-\$79,999 \_\_\_

\$80,000-\$89,999 \_\_\_

\$90,000-\$99,999 \_\_\_

+ \$100,000 \_\_\_

6. What is your present marital status?

Single \_\_\_

Common-law union \_\_\_

Married \_\_\_

Separated \_\_\_

Divorced \_\_\_

Widowed \_\_\_

7. Do you have any children? [If you have answered "NO" to this question, please go to Question #10]

Yes \_\_\_

No \_\_\_

8. How many children do you have? \_\_\_\_\_

9. What year was/were your child/children born? \_\_\_\_\_

10. What is your religious affiliation?

Catholic \_\_\_

Protestant \_\_\_

Baptist \_\_\_

Methodist \_\_\_

Anglican \_\_\_

Mormon \_\_\_

None \_\_\_

Other (please specify): \_\_\_\_\_

## 11. How many times a week do you attend Church/religious services?

Never \_\_\_

Once a week \_\_\_

Two to three times a week \_\_\_

More than 3 times a week \_\_\_

Check if you are FOR or AGAINST the following issues:

	FOR	AGAINST
a) American Free Trade Agreement	___	___
b) Bilingualism in Canada	___	___
c) Multiculturalism in Canada	___	___
d) Increasing immigration to Canada	___	___
e) Gay rights	___	___
f) Visible minority rights	___	___
g) Capital punishment	___	___
h) Women's rights	___	___
i) First Nations rights	___	___
j) Attributing "distinct society" clause to Québec	___	___
k) Québec separation	___	___

l) Giving more autonomy to the provinces

than the federal government      \_\_\_      \_\_\_

m) Social welfare policies      \_\_\_      \_\_\_

13. For which political party did you vote in the last federal election on October 25, 1993?

Liberal      \_\_\_

Conservative      \_\_\_

NDP      \_\_\_

Bloc Québécois      \_\_\_

Reform Party      \_\_\_

None      \_\_\_

14. For which political party did you vote in the last provincial election?

Liberal      \_\_\_

Conservative      \_\_\_

NDP      \_\_\_

Parti-Québécois      \_\_\_

Other (specify):      \_\_\_

**APPENDIX II: Consent Form**

**Research Project Title:** Going the Distance: Exploring the Human Side of Corporate Relocation

**Investigator:** Linda Di Luzio, Ph.D. Candidate

**Funding Agency:** The present research project is funded in part by The Izaak Walton Killam Memorial Scholarship and in part by the Department of Sociology, The University of Calgary.

This consent form, a copy of which has been given to you, is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, please ask. Please take the time to read this form carefully and to understand any accompanying information.

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**Purpose of the Study:**

The general purpose of this study is to examine, in light of the socio-political contexts of Québec and Ontario, the corporate relocation experiences of Québécois and Ontarians who have migrated to Calgary. I am conducting interviews with individuals who have relocated to Calgary under the auspices of a corporate relocation about their experiences with job mobility. Approximately 60 people will be interviewed in this research project. I will be gathering the sample from several corporations in Calgary that have been involved in the relocation of individuals from Québec and Ontario.

**Confidentiality and Publication:**

Your participation in this study is completely voluntary. You are not required to answer any questions that you do not wish to and you may withdraw from the interview at any time. If you choose to withdraw from the research project, copies of any discussion (taped/written/stored on computer disc) will be destroyed upon your request and not used in the study. At all times, only I will have access to the interview transcriptions, and all copies of the notes/transcriptions will be securely stowed in my office at home. Also, your name or that of your company will not figure anywhere in this study. The information gathered will be used for my Ph.D. dissertation, therefore, there is a possibility that the results will be published. Although transcripts of the interviews will only be seen by me, they may be discussed with my supervisor, Dr. Robert A. Stebbins (220-5827).

**Nature of Your Involvement:**

I would greatly appreciate your participation and consent to be interviewed for this research project. I ask that you answer the questions presented during the course of the interview. I am interested in finding out about your experiences surrounding your corporate relocation to Calgary. Therefore, all of the questions I will be asking directly relate to your own personal experiences with the move. I may contact you at a later date to arrange further discussions/interviews if possible.

**Possible Risks in Participation:**

The University of Calgary requires that people who participate in university research be made aware of the possible risks involved. In this research project, I believe that you are better able to assess such risks than I, therefore, you will decide whether or not to answer any particular questions on that basis. You are free to withdraw from the project at any time, and any information which you have provided will be destroyed upon your request. Should you wish to review transcriptions made of your interview(s), or view a final draft of my Ph.D. dissertation, please feel free to ask.

**Additional Questions/Comments:**

If you have any further questions or comments about this research project, please ask at any time. You may also contact my supervisor, Dr. Robert A. Stebbins, Department of Sociology, The University of Calgary, 220-5827.

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Your signature on this form indicates that you have understood to your satisfaction the information regarding participation in the research project and agree to participate as a subject. In no way does this waive your legal rights nor release the investigator, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from the study at any time. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation. If you have further questions concerning matters related to this research, please contact:

**Linda Di Luzio  
Department of Sociology  
The University of Calgary  
at 220-3214/6501**

If you have any questions concerning the ethics review of this project, or the way you have been treated, you may also contact the Department of Sociology Ethics Committee and ask for the Chairperson, at 220-6501.

\_\_\_\_\_  
Participant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Investigator/Witness

\_\_\_\_\_  
Date

A copy of this consent form has been given to you to keep for your records and reference.