# Essentials of
# **Human Resource Management**

Nina Clarke

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# Transformational leadership and employee organisational commitment in a rural-based higher education institution in South Africa

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**Orientation**: Transformation is a topical issue in South African higher education institutions. The slow and sluggish progress in attempts to transform the sector can be attributed to leadership and commitment of staff in these institutions.

**Research purpose**: The study investigated perceptions of employees and managers on the connection between transformational leadership style and employee organisational commitment in a selected rural-based higher education institution in South Africa.

**Motivation for the study**: This study was conducted to determine whether a perceived lack or the presence of transformational leadership style influences the level of organisational commitment of academic and non-academic staff members of a rural-based university. It is believed that in this way, the study may assist in determining and identifying the strategies to be used to improve the commitment of the staff members to attain the much needed transformation in higher education institutions.

**Research design, approach and method**: A self-administered questionnaire was used to gather data following a quantitative research design. The target population was divided into academic and non-academic strata. Pearson product moment correlation and multiple regression analysis were performed.

**Main findings**: The study found that transformational leadership style has a positive and significant relationship with affective commitment and moderate relationship with continuance commitment. On the contrary, it had no relationship with normative commitment. The study further revealed that perceived transformational leadership style explained the variance on employee organisational commitment. Therefore, the study concludes that effects of perceived transformational leadership style on employee commitment cannot be the same in different institutions and settings.

**Practical and managerial implications**: The study recommends that each institution should diagnose its situation for a better pictorial view of how transformational leadership affects employee organisational commitment in their organisation.

**Contribution**: The results of the study may assist leaders and employees in higher education institutions to enhance commitment for both academic and non-academic staff members through transformative leadership style to attain transformational goals of the South African higher education institutions as projected by the national government. Furthermore, this study will ensure the promotion and creation of transformative leaders who are adaptive and proactive in dealing with challenges of transformation in the former 'black' higher education institutions in South Africa and who also have staff members committed to this higher education transformation agenda.

## Introduction and background

The modern trends of more dynamic and prompt change are cultivated by globalisation and adaptive human capital development and this has become the most important aspect of any organisation and government globally (Tremblay, Lalancette, & Roseveare, 2012). Governments and organisations have invested extensively in human capital development as part of their strategic objective to address these hasty changes and to be ready to meet future human resource needs (Tremblay et al., 2012). However, in South Africa, equitable empowerment and accomplishment of higher education objectives cannot be possible without addressing the past injustices and imbalances in the education sector which among others excluded the black majority

from acquiring a quality education (Nel et al., 2014; Tremblay et al., 2012). Since 1994, the South African government has put its attention to redressing these challenges brought by the exclusionary regime (Badat, 2010). Thus, the government formulated programmes for restructuring and transforming the education system (mainly former 'Bantu universities') based on the principles of equity, human rights, democracy and sustainable development (Ministry of Education, 2002).

## Employee organisational commitment

To propel this strategic objective, committed employees are the key. Commitment to the organisation by employees or staff ensures that the company or institutions are more adaptive and productive. Various authors see employee organisational commitment as the relationship that exists between an individual and an organisation, attachment, identification with the organisation, the need to remain and the will to work hard to meet the organisational goals (Benligray & Sonmez, 2012; Huey Yiing & Bin Ahmad, 2009; Lo, Ramayah, Min, & Songan, 2010). Ozsahin, Zehir, Acar, and Sudak (2013) have stated that employee organisational commitment is an employee's strong desire to remain a member of a certain organisation, his or her willingness to put up more effort on behalf of the organisation to achieve more, and acceptance of what the organisation stands for. Employee organisational commitment takes three faces: normative, continuance and affective commitment (AC). Meyer and Allen (1984) defined AC as a positive feeling of identification, attachment and involvement by an employee to the organisation or work with which he or she is involved. Continuance commitment is the extent to which the employee or an individual is willing to remain in the organisation as compared to the costs of leaving the organisation (Dhar, 2014). On the contrary, normative commitment refers to the obligation to remain with the organisation (Mignonac, Vandenberghe, Perrigot, El Akremi, & Herrbach, 2015). Employee commitment is broadly affected by various factors, and among these factors, leadership is the key determinant to employee commitment to the organisation.

## Transformational leadership

Transformational leadership is said to be a new paradigm, and leaders can use it to create an adaptive organisation (Bagraim, Cunnigham, Pieterse-Landman, Potgieter, & Viedge, 2011). Bagraim et al. (2011) further state that a transformational leader is a futurist who creates a compelling vision that inspires total commitment to, and acceptance of, change by followers. Also, transformational leadership stimulates creativity, innovation and new ideas, which help the organisation to grow faster and adapt well to the dynamic environment (Avolio, 1999). Bushra, Usman, and Naveed (2011) further added that transformational leaders develop the vision, communicate it to employees and show consistency in the implementation of a vision, thereby generating or developing commitment from employees towards the organisation's vision. Roueche, Baker, and Robert (2014) further pointed out that perceived transformational

leadership style ignites a positive change in employees' attitudes towards the strategies and goals of the organisation. Therefore, with the ever-changing environment, it will be important that organisations, including higher education institutions, adopt a flexible and adaptive leadership style to pursue transformation in these institutions. Thus, the mission of transforming higher education institutions in South Africa can be achieved through a shared vision between leadership and employees (Avolio, 1999; Ozsahin et al., 2013). Hence, the study adopted perceived transformational leadership style. Transformational leadership is a multifaceted concept, and it has four distinct but interrelated constructs. These are discussed below.

### Charisma or idealised influence

This is the extent to which the leader acts in a pleasant way that stimulates employees or followers to develop an attachment with the leader. Idealised leaders exhibit views, believe in their followers and appeal to their employees (Van Knippenberg & Sitkin, 2013). Thus, leaders set clear values and live up to them on a day-to-day basis and being a role model to their employees. Building genuine rapport between the leaders and the followers is the key to this kind of leadership style, and trust should be built on strong grounds of morality and ethics (Roueche et al., 2014; Van Knippenberg & Sitkin, 2013).

### Inspirational motivation

According to Balley (2007), the leader inspires and appeals to his followers through articulating the vision in a charismatic manner. Inspirational leaders challenge their employees by setting high standards, communicating about the future goals and giving the meaning to the job at hand (Ndunge, 2014). Inspirational motivation (IM) raises enthusiasm and optimism; intellectual stimulation (IS) inspires rationality and reasoning; individualised consideration (IC) focuses on the personal attention; and idealised influences give visions and drive to accomplish a set goal or mission (Dubinsky, Jolson, & Spangler, 1995; Hackman & Craig, 2013; Ndunge, 2014).

### Intellectual stimulation

Intellectual stimulation refers to the extent to which the leader challenges perceptions, lobbies followers' ideology and takes risks (Northouse, 2015). These leaders arouse and encourage creativity from their subordinates. The main goal of this leadership feature is to provide a structure to the followers on how they connect to the leader, the company, objectives and one another (Northouse, 2010, 2015).

### Individualised consideration

Individualised consideration refers to the extent to which the leaders attend to the individual needs of employees and guide employees in overcoming or dealing with these concerns (Northouse, 2015). The leader respects and shows appreciation of the contributions made by each member of the team in the organisation (Northouse,

2010, 2015). This approach also gives leaders the opportunity to propel greater achievement and growth in the organisation.

## Transformational leadership and employee organisational commitment

Studies have established varied links between transformational leadership behaviour and employees' organisational commitment (Ananthi & Subramaniam, 2011; Bushra et al., 2011; Clinebell, Skudiene, Trijonyte, & Reardon, 2013; Sušanj & Jakopec, 2012). Earlier studies such as Shamir, Zakay, Breinin, and Popper (1998) revealed that transformational leaders have the ability to influence employees' organisational commitment by stimulating higher levels of intrinsic value associated with the attainment of goals and by emphasising the connection between employees' effort and goal achievement. Leaders of this type also generate a higher level of individual commitment on the part of the leader and followers to follow a common vision, mission and organisational objectives.

A study by Fasola, Adeyemi, and Olowe (2013) in the banking sector found that overall transformational leadership behaviour was positively and significantly related to employee organisational commitment ($r = 0.507$, $p < 0.01$). Furthermore, the study established that perceived transformational leadership style facets had a positive and significant relationship with employee organisational commitment constructs: idealised influence and organisational commitment ($r = 0.915$, $p < 0.01$), IM and organisational commitment ($r = 0.793$, $p < 0.01$), IS and organisational commitment ($r = 0.842$, $p < 0.01$), IC and organisational commitment ($r = 0.901$, $p < 0.01$).

Similarly, an earlier study by Kent and Chelladurai (2001) found that IC has a positive correlation with both AC and normative commitment, however, with no relationship with continuance commitment. On the same study, Kent and Chelladurai (2001) found that there was a positive correlation between IS and both AC and normative commitment.

Correspondingly, Dunn, Dastoor, and Sims (2012) established that there was a relationship between transformational leadership behaviour and employee affective and normative organisational commitment. On the contrary, the same study by Dunn et al. (2012) revealed that there was no significant relationship between transformational leadership behaviour and employee continuance commitment. Literature has shown varied relationships between transformational leadership behaviour and employee organisational commitment with different environment and settings. Hence, the study was conducted in higher education institution based in rural areas.

## Problem statement

Transformation of higher education institutions in South Africa remains a challenge, and in terms of overall output and equity of outcomes, graduate production remains very low (Cloete & Maasen, 2015; Ministerial Oversight Committee on Transformation, 2015; Higher Education, 2015). These challenges pose a great threat to both development and social cohesion in a small democracy like South Africa as it breeds high inequality rates (Soudien, 2013). Thus, less skilled people in the country feel left out by the rest of the world community who are perceived or seen as better off (Department of Higher Education and Training, 2015). In response to the ever-changing and growing lacuna between the poor and the rich, leaders need to spearhead transformation especially in rural-based higher education institutions, and this cannot be achieved by leaders alone without committed staff (Aydin, Sarier, & Uysal, 2013). As studies have shown, that leadership style(s) chosen have great influence on the degree of employee organisational commitment of an organisation. Therefore, there is a need to explore the connection between perceived transformational leadership style and employee organisational commitment in a rural-based higher education institutions in South Africa.

## Research objectives

The objectives of the study are as follows:

- To determine the relationship between perceived transformational leadership style and employee organisational commitment (affective, continuance and normative) in a rural-based higher education institution.
- To determine which of the perceived transformational leadership style constructs predicts the most employee organisational commitment (affective, continuance and normative) in a rural-based higher education institution.

### Study hypotheses

**H1:** There is a relationship between the perceived transformational leadership style and affective commitment.

**H2:** There is a relationship between the perceived transformational leadership style and normative commitment.

**H3:** There is a relationship between the perceived transformational leadership style and continuance commitment

**H4:** Transformational leadership constructs predict the facets of employee organisational commitment

### Study methodology

This study used a survey research technique following the quantitative approach. The University of Venda has ($N = 800$) staff members who are both academic and non-academic, and these formed the total target population. To determine the sample size from each stratum, the researcher used a Raosoft sample size calculator, which calculates sample based on 95% confidence interval, 5% margin of error and with the assumption of 50% response rate. Based on the Raosoft sample calculator, the recommended sample size for the University of Venda is 260. Thus, the total sample size was ($n = 260$) for this study.

## Measuring instruments

A Multifactor Leadership Questionnaire (MLQ) (Bass & Avolio, 1993) revised by Avolio, Bass and Jung (1995) was used to measure perceived transformational leadership style. This is a 24-item questionnaire that measures transformational leadership and is scored on a 5-point Likert scale ranging from 1 (strongly disagree) to 5 (strongly agree). It has sub-scales under transformational leadership, which are charisma, IM, IS and IC. Acar (2012) found that this instrument has a reliability Cronbach's alpha coefficient of between 0.893 and 0.895 for transformational leadership sub-scales. The instrument has been used previously, and it has been proved applicable and valid (Acar, 2012; Covey, 2007; Munyeka & Ngirande, 2014).

Employee Organisational Commitment Questionnaire (OCQ) (Allen & Meyer, 1990) was used to assess employee organisational commitment. This is a 15-item questionnaire that measures the three dimensions of employee organisational commitment (normative, affective and continuance commitment). It is scored on a 5-point Likert scale ranging from 1 (strongly disagree) to 5 (strongly agree). This questionnaire has a reliability of 0.977 using a strict test (Top, Oge, Atan, & Gumus, 2015). This is a valid and reliable instrument, which has been used by various scholars in testing and checking employee organisational commitment (Munyeka & Ngirande, 2014; Top et al., 2015).

## Data analysis

The Statistical Package for Social Sciences Programme (SPSS) version 23 was used to analyse and draw meaning from the data collected (IBM-SPSS Institute, 2013). In this study, the Pearson's correlational analysis was used to check the relationship between the perceived transformational leadership style and employee organisational commitment (normative, affective and continuance). Regression analysis was further used to test if transformational leadership can predict different facets of employee organisational commitment (affective, continuance and normative).

## Factor analysis

As a result of using the existing questionnaires that have been applied in many different situations and environments, factors to these variables are already known. Based on this, it is believed in this study that the systematic inter-dependence of the latent factors of commonality is known, and hence, factor analysis was not performed in this regard.

## Demographic profile of the respondents

Table 1 shows the demographic variables of the study recipients. As shown, the majority of the respondents were males 93 (52.2%), and females were 82 (46.1%). Also, most of the respondents (64) were between the ages of 40 and 49 years (64; 36.3%), followed by 50 and 59 years (46; 25.8%) and the least being those in the age of 60 years and above (10; 5.6%).

## Reliability analysis

A reliability analysis was performed to determine the internal consistency of the items, using SPSS for reliability analysis, and all items that had total-correlation value below 0.30 were deleted. Pallant (2010) pointed out that Cronbach's alpha of $\alpha = 0.70$ is the acceptable value. Results in Table 2 show that all the constructs were reliable as they surpassed the alpha coefficient of 0.70. Continuance commitment had the highest alpha coefficient value ($\alpha = 0.921$), followed by IS ($\alpha = 0.854$). The reliability analysis paved the way for Pearson's correlation and regression analysis. The reliability scores were acceptable ($\alpha = 0.70$).

# Study results

The results in Table 3 show that perceived transformational leadership style is positively and significantly related to AC ($r = 0.521*$, $p = 0.004$) and continuance commitment ($r = 0.472*$, $p = 0.003$), respectively. However, perceived transformational leadership style is not significantly related to normative commitment ($r = 0.165$, $p = 0.072$).

The correlational analysis between AC and perceived transformational leadership style constructs in Table 3 shows that AC has a strong positive significant relationship with IS ($r = 0.844*$, $p = 0.007$) and a moderate positive relationship with IC ($r = 0.451*$, $p = 0.005$). Moreover, AC has no significant relationship with idealised influence ($r = 0.570$, $p = 0.088$) and

**TABLE 1:** Characteristics of the participants ($N = 176$).

| Item | Category | Frequencies | Percentage |
|------|----------|-------------|------------|
| Gender | Female | 82 | 46.1 |
| | Male | 93 | 52.2 |
| | Missing | 1 | 0.6 |
| Age | 30 and below | 19 | 10.7 |
| | 31–39 years | 31 | 17.4 |
| | 40–49 years | 64 | 36.3 |
| | 50–59 years | 46 | 25.8 |
| | 60 and above | 10 | 5.6 |
| | Missing | 7 | 3.9 |

**TABLE 2:** Reliability of the perceived transformational leadership style and employee organisational commitment constructs.

| Scale | Cronbach's alpha ($r$) items | Interpretation | | |
|-------|------------------------------|----------------|---|---|
| | | Cronbach's Alpha scores | Number of items | Connotation |
| Transformational leadership | Idealised influence | 0.698 | 3 | Acceptable |
| | Inspirational motivation | 0.715 | 3 | Good |
| | Intellectual stimulation | 0.854 | 3 | Good |
| | Individualised consideration | 0.832 | 3 | Good |
| Employee organisational commitment | Normative commitment | 0.732 | 4 | Adequate |
| | Continuance commitment | 0.921 | 4 | Excellent |
| | Affective commitment | 0.759 | 4 | Adequate |

IM ($r$ = -0.728, $p$ = 0.001). Furthermore, correlation results showed that normative commitment and continuance commitment were significantly related to IS ([$r$ = 0.563*, $p$ = 0.002] and [$r$ = 0.232*, $p$ = 0.000], respectively).

## Transformational leadership style and affective commitment

Table 5 shows the multiple regression results for perceived transformational leadership style constructs and AC. The results indicate that perceived transformational leadership style significantly predicts AC ($F$ = 4.238, sig. = 0.002, $R^2$ = 0.496). The table further shows that IC and IS significantly predict AC ([$\beta$ = 0.144, sig. = 0.007] and [$\beta$ = 0.129, sig. = 0.016], respectively). This is shown by the comparison of beta standardised coefficients values. The results show that IM and idealised influence do not predict AC ([$\beta$ = 0.066, sig. = 0.214] and [$\beta$ = -0.055, sig. = 0.297], respectively).

## Transformational leadership style and normative commitment

Table 6 shows that perceived transformational leadership style significantly predicts normative commitment ($F$ = 2.563, sig. = 0.038, $R^2$ = 0.009). One variable of transformational leadership style is statistically significant to the regression model: IS ($\beta$ = 0.169, sig. = 0.002).

## Transformational leadership style and continuance commitment

As shown in Table 7, perceived transformational leadership style significantly predicted continuance commitment in higher education institutions ($F$ = 5.853, sig. = 0.000, $R^2$ = 0.463) and only IS contributed to the significance of the

regression model ($\beta$ = 0.232, sig. = 0.000). Individualised consideration, individualised influence and IM show that they do not predict continuance commitment ([$\beta$ = -0.009, sig. = 0.866], [$\beta$ = 0.074, sig. = 0.158] and [$\beta$ = -0.066, sig. = 0.212], respectively).

# Discussion

The results show that perceived transformational leadership style has a positive and significant relationship with AC ($r$ = 0.521*, $p$ = 0.004). We therefore reject the null hypothesis that there is no relationship between perceived transformational leadership style and AC. Thus, the results indicate that leaders who stimulate employee morale can boost the emotional attachment to the organisation (Roueche et al., 2014). This helps the organisation in the preparation for adoption of new strategies or plan (Roueche et al., 2014). Therefore, higher education institutions in South Africa can capitalise on this by stimulating morale to prepare their staff for higher education transformation. The findings of this study are similar to the study conducted by Abdo Saeed, Gelaidan, and Ahmad (2013) in the higher educational institutions in Yemen. The study by Abdo Saeed et al. (2013) found that perceived transformational leadership style was positively related to AC ($r$ = 0.389*).

The overall correlation analysis showed that there was no relationship between perceived transformational leadership style and normative commitment ($r$ = 0.165, $p$ = 0.752). Therefore, we do not reject the null hypothesis that there is no significant

**TABLE 3:** The relationship between perceived transformational leadership style and employee organisational commitment constructs.

| Transformational leadership style | $r$ | $p$ |
| --- | --- | --- |
| Affective commitment | 0.521* | 0.004 |
| Normative commitment | 0.165 | 0.072 |
| Continuance commitment | 0.472* | 0.003 |

*, Correlation is significant at the 0.01 level.

**TABLE 5:** Transformational leadership style constructs as predictors of affective commitment.

| Dependent variable: Affective commitment | $\beta$ | Significance | Standard error | $p$ |
| --- | --- | --- | --- | --- |
| Idealised influence | 0.066 | - | 0.074 | 0.214 |
| Intellectual stimulation | 0.129 | - | 0.064 | 0.016 |
| Individualised consideration | 0.144 | - | 0.063 | 0.007 |
| Inspirational motivation | -0.055 | - | 0.039 | 0.297 |
| $R^2$ | - | 0.496 | - | - |
| $F$ | - | 4.238 | - | - |

$\beta$, Standardised coefficients; $R^2$, proportion of the variance in the dependent variable; $F$, significance of the regression model.

**TABLE 4:** Relationship between perceived transformational leadership style constructs and employee organisational commitment facets.

| Items | Measure | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Idealised influence | Pearson's correlation | 1 | - | - | - | - | - | - |
| | Sig. (2-tailed) | | - | - | - | - | - | - |
| Intellectual stimulation | Pearson's correlation | 0.116 | 1 | - | - | - | - | - |
| | Sig. (2-tailed) | 0.030 | - | - | - | - | - | - |
| Inspirational motivation | Pearson's correlation | 0.086 | 0.113 | 1 | - | - | - | - |
| | Sig. (2-tailed) | 0.108 | 0.034 | - | - | - | - | - |
| Individualised consideration | Pearson's correlation | -0.041 | 0.092 | 0.049 | 1 | - | - | - |
| | Sig. (2-tailed) | 0.446 | 0.085 | 0.354 | - | - | - | - |
| Affective commitment | Pearson's correlation | 0.570 | 0.844* | -0.728 | 0.451* | 1 | - | - |
| | Sig. (2-tailed) | 0.088 | 0.007 | 0.001 | 0.005 | - | - | - |
| Normative commitment | Pearson's correlation | -0.000 | 0.563* | 0.018 | -0.024 | 0.453* | 1 | - |
| | Sig. (2-tailed) | 0.993 | 0.002 | 0.739 | 0.649 | 0.000 | - | - |
| Continuance commitment | Pearson's correlation | 0.096 | 0.232* | -0.033 | 0.006 | 0.480* | 0.583* | 1 |
| | Sig. (2-tailed) | 0.072 | 0.000 | 0.531 | 0.907 | 0.000 | 0.000 | - |

*Source*: IBM-SPSS Institute. (2013). *SPSS 12.0 for windows*. Chicago, IL: SPSS.

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

Sig., significance.

**TABLE 6:** Transformational leadership style constructs as predictors of normative commitment.

| Dependent variable: Normative commitment | β | Significance | Standard error | p |
|---|---|---|---|---|
| Idealised influence | -0.022 | - | 0.082 | 0.682 |
| Intellectual stimulation | 0.169 | - | 0.072 | 0.002 |
| Individualised consideration | -0.041 | - | 0.071 | 0.443 |
| Inspirational motivation | 0.003 | - | 0.043 | 0.961 |
| $R^2$ | - | 0.009 | - | - |
| $F$ | - | 2.563 | - | - |

β, Standardised coefficients; $R^2$, proportion of the variance in the dependent variable; $F$, significance of the regression model.

**TABLE 7:** Transformational leadership style constructs as predictors continuance commitment.

| Dependent variable: Continuance commitment | β | Significance | Standard error | p |
|---|---|---|---|---|
| Idealised influence | 0.074 | - | 0.066 | 0.158 |
| Intellectual stimulation | 0.232 | - | 0.058 | 0.000 |
| Individualised consideration | -0.066 | - | 0.035 | 0.212 |
| Inspirational motivation | -0.009 | - | 0.057 | 0.866 |
| $R^2$ | - | 0.463 | - | - |
| $F$ | - | 5.853 | - | - |

β, Standardised coefficients; $R^2$, proportion of the variance in the dependent variable; $F$, significance of the regression model.

relationship between perceived transformational leadership style and normative commitment. The findings of this study are in contrast to the findings by Dillen (2012) who found a weak and positive relationship between perceived transformational leadership style and normative commitment in the nuclear energy cooperation. This exhibits the differences on how leadership styles in different industries influence employee organisational commitment.

The overall analysis showed that there is a moderate and significant relationship between perceived transformational leadership style and continuance commitment ($r = 0.472^*$, $p = 0.003$). Therefore, we reject the null hypothesis that there is no relationship between perceived transformational leadership style and continuance commitment in higher education institutions. The results tell us that employees who have long stayed or invested a lot in the development of the organisation are more likely to stay or remain with the organisation (Ranaweera & Menon, 2013). Thus, if employees are encouraged to be involved in higher education institutions, they are more likely to contribute more and remain with the organisation in the long run. The findings of this study agree with a study conducted in South African higher education institutions by Munyeka and Ngirande (2014) as well as another study conducted in Addis Ababa's private higher education institutions by Teshome (2012). Furthermore, the construct correlation result shows that continuance commitment is positively related to IS ($r = 0.232^*$, $p = 0.000$).

### Transformational leadership style and affective commitment

The results show that 49.6% of AC can be explained by perceived transformational leadership style ($R^2 = 0.496$). Also, in the same analysis, beta standardised coefficients values show that IS is the only perceived transformational leadership

style construct which predicts AC. $R^2$ value of 0.496 shows that a significant amount of AC can be attributed to AC. Therefore, we can conclude that leaders who continuously challenge their employees with perceptions can influence the emotional attachment of their employees.

### Transformational leadership style and normative commitment

Intellectual stimulation showed that it is the only sub-scale of perceived transformational leadership style that predicts normative commitment ($\beta = 0.169$, $p = 0.002$). According to regression results in Table 6, idealised influence, IC and IM predict normative commitment with no significant predictions. It should also be noted that overall, transformational leadership has the least predicational power to normative commitment ($R^2 = 0.029$).

### Transformational leadership style and continuance commitment

As the results show, perceived transformational leadership style has a moderate predicational power to continuance commitment ($R^2 = 0.463$). Thus, 46.3% of continuance commitment can be explained by transformational leadership. Results further show that IS predicts continuance commitment ($\beta = 0.232$, $p = 0.000$) unlike other sub-scales.

## Conclusion

The dynamic nature of higher education recommends the need for effective leadership and committed employees to keep up with the demand put upon higher education institutions. In consideration of the various changes and reforms in higher education in several nations, it is crucial for higher education institutions to investigate the effectiveness of leadership as well as the level of commitment among employees. The plethora of literature on the transaction and perceived transformational leadership styles and employee organisational commitment addresses the issues in developed countries. Very few studies on this topic have been conducted in the developing countries, particularly in South Africa. Correlation and regression analysis were used to determine the relationship between leadership styles and employee organisational commitment in higher education institutions. The results revealed varied results in the overall analysis. Based on the study's outcomes, it is difficult to outwardly conclude that there is a relationship between perceived transformational leadership styles sub-scales and employee organisational commitment constructs. However, it is safe to say that transformation leadership style constructs are variedly related to employee organisational commitment facets. Regression analysis revealed that, to a greater extent, perceived transformational leadership style predicts employee organisational commitment. Therefore, from the results, one can conclude that each institution should conduct its own institutional diagnosis to establish which of the leadership styles or sub-scales contribute to what facet of employee organisational commitment.

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# Acknowledgements

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# The combined influence of self-leadership and locus of control on the job performance of engineering workforce in a power generation utility:
# An empirical perspective

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**Orientation:** The joint effects of self-leadership and locus of control within an engineering context have been under-explored because much research focused on self-leadership and locus of control as independent concepts, and studies on their combined effects on organisational performance remain hard to encounter in emerging economies.

**Research purpose:** The aim of the study was to develop deeper empirical knowledge of the combined effects of self-leadership and locus of control on job performance of engineering workforce in Eskom Free State.

**Motivation for the study:** The originality of the study lies in the reconstitution of individual self-leadership and locus of control concepts as they relate to job performance and its impact on prospective engineers who work at Eskom in Bloemfontein.

**Research approach/design and method:** Drawing on a quantitative approach, a survey was conducted on 134 engineering personnel (comprising engineers, technologists and technicians). Of this workforce, a total of 107 engineers participated in the study representing a response rate of 79.8%. Correlation and multiple regression analysis were used to analyse the corpus of quantitative data.

**Main findings:** The results demonstrate that self-leadership and locus of control are significant independent variables and when considered jointly, they have a positive significant impact on job performance of the Eskom engineering workforce.

**Practical/managerial implications:** Implications for the initiation and fostering of self-leadership and locus of control to improve the job performance of Eskom Bloemfontein engineering workforce are discussed.

**Contribution/value-add:** The study contributes to engineers' task-focused behaviour through its expectations for the engineering workforce to be self-leaders who exercise internal locus of control in the execution of their jobs. This study also contributes to engineers' work-related personality dimensions and sense of self-awareness through an exposition of individual personalities they were not conscious of.

## Introduction

This empirical study examines the combined influence of self-leadership and locus of control on the job performance of the engineering workforce in a power generation utility, Eskom, Free State. Eskom Holdings SOC Limited (hereinafter referred to as 'Eskom') which is the largest public power utility responsible for the generation, transmission and distribution of electricity in South Africa. Among its core mandates, Eskom has contributed to the steering of positive economic growth, economic and social transformation, strived to reduce carbon emissions (for which it is one chief contributor) and improved the efficiency (Tsotsi, 2011) of the electricity generation and distribution programmes and projects. For the purpose of this study, self-leadership is one's intrinsic motivation to influence self, regarding what, why and how to perform work (Stewart, Courtright & Manz, 2011). Locus of control is a psychological concept that refers to how strongly people believe they have control over situations and experiences that affect their lives. However, self-leadership is impossible without an internal locus of control (Adams, Kalliny, De los Santos, & Wang, 2008; McDevitt, Giapponi, & Tromley, 2007). Similarly, Thomas, Kelly and Lillian (2006) report a strong connection between employees' regulation or control of their actions

(i.e. locus of control) and the consequences of those actions in the work environment (e.g. successful job performance).

There is a convergence of literature on the role of self-leadership and locus of control in improving organisational performance (Dewettinck & van Ameijde, 2011; Kalyar, 2011; Neck & Houghton, 2006; Schermuly & Meyer, 2011; Sharma & Kaur, 2011). However, the multiplicity of challenges experienced at Eskom seems to be inconsistent with the prevalence and exertion of self-leadership and internal locus of control at this institution. These challenges include continuous blackouts attributed to poor projections of electricity demands, infrastructural project completion delays leading to cost overruns, project scope creep and increased electricity tariffs to avoid load shedding. As such, the combined influence of self-leadership and locus of control of the engineering workforce at Eskom, Bloemfontein on job performance needs examination to ensure effective delivery of electricity services in South Africa. Therefore, this study seeks to address the following question:

- What is the combined influence of self-leadership and locus of control of the Eskom engineering workforce on their job performance?

## Problem statement

Electricity is regarded as a pivotal component and enabler of mining, industrial, commercial and domestic activities that drive economic growth opportunities and enhance decent living for all South Africa's citizens. By the same token, the Republic of South Africa's National Development Plan (which aims to eliminate poverty and reduce inequality) portrays electricity as an important component of a development framework that would assist society in achieving decent standards of living (National Planning Commission, 2012). Mindful of this profound importance of electricity for human development and survival, it is unsurprising that the South African government is the sole shareholder of Eskom that directs this organisation's actions to ensure the achievement of its strategic objectives (Eskom Holdings SOC Ltd, 2013a).

Eskom's underperformance has been interpreted as a consequence of multiple factors. These factors include serious and persistent failures of electricity supply leadership by the board of Eskom, leadership failures in government, lack of capacity by Eskom and government with regard to negotiating a successful private sector partnership for new generation capacity and Eskom management's poor response to the difficult situation (Business Tech, 2015; CDE Round Table, 2008). Constraints within leadership manifested in the Eskom Board's failure to provide skilled and independent leadership to Eskom's management in dealing with coal procurement issues and the energy mix, and in the decade-long failure to communicate effectively with government and the public about the urgent need to build more power stations (CDE Round Table, 2008). This conundrum was compounded further by the leadership crisis at Eskom as recently noted

in the suspension of Eskom's Chief Executive Officer (CEO), three other senior executives and the Financial Director, to allow for the Eskom Board Chairman's inquiry into the operations of the utility without their interference (Business Tech, 2015). The lack of capacity at Eskom and in the government resulted in their failure to contract international and local contractors to build a single plant in seven years (2001–2007) (CDE Round Table, 2008) long after the electricity crisis in South Africa had been predicted by the African National Congress cabinet in 1998.

The leadership crisis at Eskom recently manifested in the suspension of Eskom's CEO, three other senior executives and the Financial Director, to allow for the Eskom Board Chairman's inquiry into the operations of the utility without their interference (Business Tech, 2015). In 2016, the CEO of Eskom resigned under controversial circumstances over allegations of irregularities and corruption involving the awarding of tenders for procuring coal to fire Eskom's power plants.

Despite the aforementioned challenge's demonstration of the inseparable connection of self-leadership and locus of control, these concepts and their impact on job performance are often explored as independent subjects. For instance, a demonstration of self-leadership by management is considered to modify employees' perceptions of aspects of organisational culture such as social irresponsibility and minimise the associated negative effects that lead to undesirable behaviours among organisational employees (Pearce & Manz, 2011). By the same token, because internal locus of control is postulated to have a positive relationship with performance (Thomas et al., 2006), fostering internal locus of control among employees of an organisation can optimise the productivity of the organisation. Although internal locus of control may positively impact performance of an organisation, such impact cannot be assumed to be universal as other critical variables (e.g. self-leadership) are also implicated in organisational performance. However, to our knowledge, the combined effects of locus of control and self-leadership on organisational performance remain unknown in developing economies as no systematic study has been conducted to date on these issues. Fostering high levels of self-leadership and internal locus of control can contribute to the overcoming of organisational cultures that impede innovation (Prattom & Savatsomboon, 2012) and the optimisation of organisational performance. Therefore, the problem is our limited knowledge of the combined effects of self-leadership and locus of control on the job performance of the engineering workforce.

## Literature review

### Definition of self-leadership

Self-leadership has been explored by different authors who came up with different characterisations of the term, and different studies on the concept across different contexts have generated different results (Elloy, 2008). The concept, which first emerged in the mid-1980s (Manz, 1983, 1986) as an

expansion of self-management (Manz & Sims, 1980), was rooted in the clinical self-control theory (Cautela, 1969). Self-leadership is inspired by Kerr and Jermier's (1978) notion of 'substitutes for leadership', which describes situational factors that may 'neutralise' leadership or prevent a leader from taking action in particular situations. Stewart et al. (2011) define self-leadership as the process of self-motivating and self-determining one's actions through specific behavioural and cognitive methods.

Self-leadership consists of three distinct but complimentary strategies – behaviour-focused, natural reward, and constructive-thought pattern – strategies through which people control their own actions and thinking to reach personal and organisational goals (Manz & Sims, 2001; Neck & Manz, 2010; Prussia, Anderson, & Manz, 1998).

*Behaviour-focused strategies* are related to a set of self-influence strategies proposed by early self-management scholars (Manz & Sims, 1980). These strategies operate within the framework of Bandura's (1986) social learning theory, which argues that a person's behaviour is influenced not only by external environmental factors but also by the individual's self-regulation processes. Based on the premise of social learning theory, Manz and Sims (1980) highlight various self-management strategies such as self-goal setting, self-observation, self-reward, self-punishment and self-cueing (Manz, 1986; Neck & Manz, 2010) that are used by individuals to manage their goal-striving behaviours.

*Natural reward strategies* involve building more pleasant and enjoyable features into goal-striving actions as well as shaping one's perceptions by focusing attention on the rewarding aspect rather than the unpleasant features of tasks (Manz & Sims, 2001; Neck & Manz, 2010).

*Constructive-thought strategies* focus on the formation of constructive thought patterns that can positively impact performance (Neck & Manz, 2010). They include evaluating beliefs and assumptions, the use of mental imagery and positive self-talk.

### Studies of self-leadership

Van Zyl (2013) examines self-leadership and happiness within the South African working context (schools, manufacturing, mining and electricity sectors). The study reports that self-leadership can affect happiness within the African working context and the integration of this concept into traditional African values and beliefs can contribute to employees' achievement of their full work potential. Another study conducted by Jooste and Roux (2014) examines the practice of self-leadership in personal and professional development of contract nursing staff in a higher education institution. The study revealed that contract staff feel undervalued by the organisation and job insecurity and fewer benefits undermine their motivation and self-leadership within the organisation. The study also revealed that contract employees' exertion of self-leadership enables the regulation of their own actions,

personally and professionally. It can be inferred that while organisational environment can undermine the pursuit of self-leadership, personal agency could be fundamental to the realisation of self-leadership.

### Implications of self-leadership on job performance

Research evidence links organisational success to various features of leadership, such as self-leadership (Houghton, Dawley & DiLiello, 2012). Be that as it may, the self-leadership-performance relationship is not a clear and straightforward one. Goldman, Wesner, and Karnchanomai (2013) warn that although organisations make huge financial investments into leadership development programmes, the benefits for organisations and individuals who complete these programmes are not yet discernible or well understood. At a team level, most studies on self-leadership focused on task performance to understand the role of self-leadership in achieving a high level of team performance aspects such as proficiency, adaption or proactivity (Hauschildt & Konradt, 2012). In a German business context, Hauschildt and Konradt (2012) conducted an empirical study on self-leadership and team members' work role performance and reported that self-leadership is positively related to adaption and proactivity at the individual and team task level.

### Definition of locus of control

Julian Rotter first developed the concept 'Locus of Control'. Locus of control according to Rotter (1966) refers to a personality dimension that helps explain one's behaviour. It refers to the perception of one's capacity to influence work or life outcomes and the extent to which people believe that they can control the events that affect them. Locus of control is defined as a person's tendency to see events as being controlled internally or externally (Rotter, 1966; Shojaee & French, 2014). This tendency characterises a person's perspective on self-independence in contrast to control by others. Locus of control also determines the likelihood of a particular behaviour as well as the outcomes of engaging in such behaviour (April, Dharani, & Peters, 2012). In the context of an engineering environment, locus of control describes the capacity of engineers to shape and influence work-related outcomes such as engineering drawing, maintenance of substations and execution of technical tasks such as restoration of power in customers' houses.

Locus of control can be categorised into internal and external locus of control. The individuals with internal locus of control have the belief that they can monitor the events or situations with their own fate and have a strong belief in themselves and their abilities (Zaidi & Mohsin, 2013). Therefore, such individuals discern clear connections between their actions and outcomes of their behaviours. In contrast, individuals with external locus of control attribute events and situations to the external circumstances rather than to their own capabilities. Therefore, they believe that the events affecting their lives cannot be predicted and controlled (Kücükkaragöz, 1998; Rastegar & Heidari, 2013) as they are consequences of a complex, dynamic external environment.

### Studies of locus of control

Hans, Mubeen and Ghabshi (2014) conducted a study on locus of control and job satisfaction in private international schools in the Sultanate of Oman. The findings revealed that teachers at private international schools were primarily driven by internal locus of control and their level of job satisfaction was high.

Another study conducted by Mustafa (2011) examined the goal orientations, locus of control and academic achievement of prospective teachers in different majors at the Faculty of Education in Pamukkale University in Turkey. The results show that mastery goal orientation was positively related with locus of control ($r = 0.35$; $p < 0.01$) and academic achievement ($r = 0.15$; $p < 0.05$) and avoidance goal orientation was negatively related with locus of control ($r = -0.21$; $p < 0.01$) and academic achievement ($r = -0.19$; $p < 0.01$). A positive relationship was found between locus of control and academic achievement ($r = 0.14$; $p < 0.05$). The results obtained in this study suggest that the teachers should stimulate their students to develop and use internal locus of control and mastery goal orientation to increase their academic performance. More so, they need to enhance internal locus of control for them to become good mastery learners.

### Implications of locus of control for job performance

Many researchers have shown that locus of control is related to performance (Sonnentage, Volmer, & Spychala, 2010; Spector, 1982; Spector & O'Connell, 1994).

Wang, Bowling and Eschleman (2010) found that individuals with an internal locus of control orientation appear more motivated, perform better on the job and express higher levels of satisfaction than individuals with an external locus of control. Literature (Chen & Silverthorne, 2008; Asgari & Varkiri, 2012) states that locus of control has been found to be positively associated with low perceived stress and high performance. If individuals with internal locus of control are found to take charge, perform better on complex tasks, are easier to motivate and exercise a higher degree of initiative than externals, as much of the research using Rotter's I-E questionnaire suggests, then it is reasonable to expect such individuals to demonstrate higher performance ratings and maintain a significantly greater performance average on their jobs than those with external locus of control. Several studies support the notion that internals (people with internal locus of control) exert greater effort on the job and are subsequently better performers (Asgari & Vakiri, 2012; Muhonen & Torkelson, 2004; Thomas et al., 2006) than externals (people with external locus of control).

### Combined influence of self-leadership and locus of control on job performance

The importance of the self-leader – locus of control – performance relationship arises from the contribution of followers to the leadership process as followers are integral to the performance of leadership (Verwey, Du Plessis, & Van der Merwe, 2013). Because self-leadership emphasises one's intrinsic motivation towards work (Stewart et al., 2011), it can be conceived to directly feed into perceptions about one's capacity to influence his or her work-related outcomes and, therefore, improve performance of large organisations. As such, self-leadership is impossible without an internal locus of control and innovation (Adams et al., 2008; McDevitt et al., 2007). It can be inferred from the aforementioned discussion that a combination of self-leadership and internal locus of control is critical in achieving high job performance for engineers through increased proficiency, adaptation or proactivity and the ability to multitask in the face of competing tasks and work activities.

# Methodology

## Research design

A research design details the procedures necessary for collection, measurement and analysis of data, which helps the researcher to structure or solve research problems (Sreejesh, Mohapatra, & Anusree, 2014).

A survey design was adopted in this study to explore Eskom engineers' perceptions of the importance of being a self-leader and having internal locus of control and the implications of such traits for job performance. Because surveys are ideal for collecting information from large groups of individuals at minimum cost, this design cohered with the researchers' intentions to collect data from a large engineering workforce comprising engineers, technologists and technicians at Eskom, Bloemfontein.

## Target population

The population comprised 134 full-time engineering workforce ($N = 134$) from Eskom Free State departments where the study was carried out. Of the 134 engineering workforce, there were 30 full-time graduate engineers, 34 technologists and 70 technicians. Given the small size of the population of engineers, technologists and technicians at Eskom, Bloemfontein, a census involving all members of this workforce, was considered. A census is considered appropriate when the entire population is very small and hence it becomes necessary to include all members of that population to all the engineering workforce, 107 questionnaires were successfully completed, representing 79.8% of the total population.

## Data collection

The second author administered the survey on respondents. The process involved getting clearance from senior management at Eskom and the distribution of printed closed Likert-based questionnaires to respondents. The survey, which was administered over 2 months involved the respondents de-briefing in groups about the purpose of the study and its intended benefits. They were also apprised of their anonymity and their right to voluntarily participate in the study. While the researcher administered some of the questionnaires, those respondents who were busy were

granted the opportunity to collect the questionnaires, complete them at times convenient to them and submit them in one office most accessible to them.

## Data analysis

Descriptive and inferential statistics were employed in this study. Descriptive statistics which include frequencies and percentages were used to present demographic data. Spearman's rho correlation coefficient and regression equations were used to test the independent variables' influence on the dependent variable (i.e. job performance) and to predict their influence on job performance, respectively.

## Instrument credibility

The structured questionnaire instrument was an adapted version of Rotter's Locus of Control Scale and Revised Self-Leadership Questionnaire. A reliability analysis was conducted using Cronbach's alpha coefficient. The Cronbach's alpha coefficient for internal locus of control was 0.706 and for external locus of control 0.434. The Cronbach's alpha coefficient for locus of control (overall) was 0.688. The Cronbach's alpha coefficient for self-leadership (overall) was 0.810.

The self-leadership concept was also disaggregated into its components namely: behaviour-focused, natural rewards and constructive thoughts and the reliability analyses for these components were also calculated. The Cronbach's alpha coefficient for behaviour-focused component (overall) was 0.744, for natural rewards 0.695 and for constructive thoughts (overall) 0.798. Based on Kumar's (2011) argument that any Cronbach's coefficient that is over 0.6 signifies a reliable measurement, these statistics demonstrate that questionnaire items were reliable.

The averages and percentages of the internal locus of control and overall locus of control variables were calculated.

**TABLE 1:** Descriptive statistics.

| Variables | Mean | Mean % |
|---|---|---|
| Internal locus of control | 58.41 | 77.88 |
| Locus of control (overall) | 76.02 | 69.11 |

**TABLE 2:** Descriptive statistics of self-leadership.

| Variables | Mean | Mean % |
|---|---|---|
| **Behaviour-focused (components)** | | |
| Self-goal setting | 21.24 | 84.97 |
| Self-reward | 10.58 | 70.53 |
| Self-observation | 16.75 | 83.74 |
| Self-cueing | 11.42 | 76.14 |
| Self-punishment | 20.09 | 66.98 |
| Behaviour-focused (overall) | 80.08 | 76.27 |
| **Natural rewards** | | |
| Natural rewards | 16.56 | 82.80 |
| **Constructive thought (components)** | | |
| Self-talk | 7.62 | 76.17 |
| Evaluating beliefs and assumptions | 11.65 | 77.69 |
| Constructive thought (overall) | 19.27 | 77.08 |
| Self-leadership (overall) | 115.92 | 77.28 |

The average and percentages of self-leadership overall and its components were also calculated. The means and mean percentages of each of the items are presented in Tables 1 and 2, respectively.

The mean percentages of internal locus of control and overall locus of control were 77.88% and 69.11%, respectively. These measures were all high and above 50.00%. This means that a majority of these engineers identify highly with the locus of control.

The mean percentages of overall self-leadership, behaviour-focused (overall), natural rewards and constructive thoughts (overall) are 77%, 76%, 82%, and 77% which are all high and above 50%. This means that a majority of these engineers identified highly with self-leadership, that is, they regarded themselves as self-leaders.

# Results
## Profile of respondents

Table 3 illustrates the profile of the respondents by gender, age group, ethnicity, marital status, educational level, hierarchy and their years of experience on the job.

The results in Table 3 highlight that a majority of respondents were men (55.14%, $n = 59$) while the remainder were women (44.86%, $n = 48$). Also, slightly more than a third (38.32%) of the respondents were in the 21–30 years of age category, followed by those who were 41 years of age and above (31.78%, $n = 34$) and lastly 31–40 years of age (29.91%, $n = 32$) group, respectively. About 65.42% of the respondents were black Africans, 27.36% were white and 7.55% were Indians and other minority groups.

**TABLE 3:** Demographic information.

| Demographic information | Category | Frequency | Percentage |
|---|---|---|---|
| Gender | Female | 48 | 44.86 |
| | Male | 59 | 55.14 |
| Age group | 21–30 years | 41 | 38.32 |
| | 31–40 years | 32 | 29.91 |
| | 41 years and above | 34 | 31.78 |
| Ethnicity | Black Africans | 70 | 65.42 |
| | White | 29 | 27.36 |
| | Indian and others | 8 | 7.55 |
| Marital status† | Single | 44 | 41.12 |
| | Married | 63 | 58.88 |
| Educational level | Matric and certificate | 9 | 8.41 |
| | Diploma | 33 | 30.84 |
| | Honours | 21 | 19.63 |
| | Masters | 14 | 13.08 |
| | Others | 30 | 28.04 |
| Engineers hierarchy | Technicians | 50 | 46.73 |
| | Technologist | 28 | 26.17 |
| | Graduate Engineer | 29 | 27.10 |
| Years of experience on the job | 0–5 years | 27 | 25.23 |
| | 6–10 years | 28 | 26.17 |
| | 11–15 years | 24 | 22.43 |
| | Over 15 years | 28 | 26.17 |

†, Combined never married, divorced and/or separated and widowed and named it single. This is for more plausible comparability for marital status groups.

In addition, 41.12% of the respondents were never married, divorced and/or separated or widowed while 58.88% were married. A sizable percentage of the respondents (30.84%) had diplomas, while 28.04% had other qualifications, 19.63% ($n = 21$) had honours degrees and a further (13.04%, $n = 14$) had master's degrees. Lastly, the results indicate that 46.73% of the respondents were technicians, with 27.10% being graduate engineers and a small percentage (26.17%) were technologists.

## Regression analysis

Having established the information above, the next step was determining the relationship among self-leadership, locus of control and job performance. The following regression equation was conducted.

A regression equation with job performance as a dependent variable and locus of control as the independent variable was created. This regression sought to determine the impact that locus of control has on job performance. The results are reported in Table 4.

The results show that locus of control has a positive impact on job performance. The coefficient, 0.157, means that an improvement on locus of control by 1.0% leads to a 15.7% increase in job performance. $R$ squared is 0.162, which means that about 16.2% of the variation in job performance is explained by locus of control.

A regression equation with job performance as a dependent variable and self-leadership as the independent variable was constructed. This regression sought to determine the impact that the components of self-leadership have on job performance. The results are reported in Table 5.

The results in Table 5 show that behaviour-focused self-leadership and constructive thought were the only significant independent variables. They have a positive impact on job performance.

A regression equation with job performance as a dependent variable and a combination of locus of control and self-leadership as the independent variables was constructed. The results are reported in Table 6.

The results in Table 6 show that self-leadership and locus of control are significant independent variables even though both have a positive impact on job performance.

# Discussion on findings

In view of the regression results of locus of control as indicated in Table 4, locus of control has a positive and statistically significant influence on job performance. This is supported by Asiedu-Appiah and Addai's study (2014) whose regression analysis examined the existence of a link between employees' locus of control and contextual performance. Their study concluded that employees with higher internal locus of control had higher contextual performance ratings than employees with external locus of control.

Furthermore, results from the regression analysis on self-leadership components (Table 5) confirm that behaviour-focused and constructive thought strategies are the only significant independent variables that have a positive impact on job performance. Because self-leadership is conceptualised as an intrapersonal process for influencing oneself (Manz, 1986; Manz & Neck, 2004; Sahin, 2011), it is not surprising that previous research has shown that each component of self-leadership contributes to performance (Neck & Houghton, 2006). For example, Neck and Manz (1992) found that individuals who received training in the constructive-thought pattern strategies experienced enhanced states of positive affect (enthusiasm) and job satisfaction as well as a decreased state of nervousness relative to those who had not received such training. The behaviour-focused coefficient of 0.104 means that an improvement in behaviour-focused self-leadership by 1.0% will lead to a 10.4% increase in job performance. Moreover, the constructive thought coefficient of 0.167 means that an improvement in constructive thought leadership by 1.0% will lead to a 16.7% increase in job performance. Although the behaviour-focused and constructive thought strategies were not very large, they were a statistically significant and positive influence on job performance. This finding is corroborated by findings from literature. A study conducted by Politis (2006) established a direct, positive and significant relationship between behavioural-focused strategies and job satisfaction. It has usually been suggested that an individual who exhibits self-leadership behaviour is more likely to improve his or her performance with contributions to the organisational performance than an individual who does not exhibit self-leadership behaviours (Neck & Houghton, 2006; Neck & Manz, 1996).

**TABLE 4:** Regression results (locus of control only).

| Dependent variable: Performance | Unstandardised | | $t$-statistic | $p$-value |
|---|---|---|---|---|
| | Coefficients | Std. Error | | |
| Intercept | 8.683 | 2.675 | 3.246 | 0.002 |
| Locus of control | 0.157 | 0.035 | 4.499 | 0.000 |
| $R$ Square | 0.162 | - | - | - |

Std., standard.

**TABLE 5:** Regression results (self-leadership components).

| Dependent variable: Performance | Unstandardised | | Standardised coefficients | $t$-statistic | $p$-value |
|---|---|---|---|---|---|
| | Coefficients | Std. Error | | | |
| Intercept | 9.136 | 1.782 | - | 5.127 | 0.000 |
| Behaviour-focused | 0.104 | 0.023 | 0.418 | 4.562 | 0.000 |
| Constructive thought | 0.167 | 0.074 | 0.206 | 2.246 | 0.027 |
| Adjusted $R$ square | 0.277 | - | - | - | - |

Std., standard.

**TABLE 6:** Regression results (both locus of control and self-leadership).

| Dependent variable: Performance | Unstandardised | | Standardised coefficients | $t$-statistic | $p$-value |
|---|---|---|---|---|---|
| | Coefficients | Std. Error | | | |
| Intercept | 4.319 | 2.600 | - | 1.661 | 0.100 |
| Self-leadership | 0.085 | 0.018 | 0.429 | 4.774 | 0.000 |
| Locus of control | 0.086 | 0.035 | 0.219 | 2.432 | 0.017 |
| Adjusted $R$ square | 0.299 | - | - | - | - |

Std., standard.

The standardised coefficients in Table 5 show the marginal contributions of each variable to job performance and they help determine which of the independent variables are the most important. Behaviour-focused leadership has a standardised coefficient of 0.418 and constructive thought has a standardised coefficient of 0.206. This means that behaviour-focused leadership exerts a larger positive influence on job performance than constructive thought. The $R$ square value is 0.277, which means that about 27.7% of the variation in job performance is explained by behaviour-focused leadership and constructive thought.

Our finding (Table 6) on how locus of control and job performance are connected to performance resonates with mainstream literature. The self-leadership coefficient was 0.085, implying that an improvement in self-leadership of 1.0% leads to an 8.5% increase in job performance. The locus of control coefficient was 0.086, which means that an improvement in locus of control of 1% will increase the job performance of the engineering workforce by 8.6%. When self-leadership and locus of control are considered jointly, they explain 29.9% of the variation in job performance. This is consistent with the literature review, which reports that self-leadership is impossible without locus of control (Adams et al., 2008; McDevitt et al., 2007).

The self-leadership contribution to locus of control – job performance is also widely supported by literature. These findings corroborate evidence from mainstream literature on the significant role of self-leadership in improving organisational performance (Dewettinck & van Ameijde, 2011; Kalyar, 2011; Schermuly & Meyer, 2011). Moreover, the locus of control coefficient of 0.086 implies that an increase in locus of control of 1% will lead to 8.6% increase in job performance. Thomas et al. (2006) report a strong connection between employees' regulation or control of their actions (i.e. locus of control) and the consequences of those actions in the work environment (e.g. successful job performance). The standardised coefficients show the marginal contributions of each variable to job performance and assist in determining which of the independent variables are the most important. Self-leadership has a standardised coefficient of 0.429 and the locus of control has a standardised coefficient of 0.219. This means that self-leadership has a larger contribution to job performance than locus of control. The $R$ square value is 0.299, which means that about 29.9% of the variation in job performance is explained by self-leadership and locus of control. The findings on regression analysis (Table 6) led to the conclusion that there is a positive relationship among self-leadership, locus of control and job performance even though the effect of the relationship as shown in the above tables is moderately strong.

## Implications

The fact that self-leadership and locus of control are regarded as self-influence behaviour that directs an individual towards performance when working indicates that managers need to develop a wider awareness of these concepts within the work environment to increase the self-conscious actions that affect employee productivity in the work environment. This will enable the employees to understand and identify with a strong leadership culture of an organisation to improve innovation and productivity with the organisation.

Given that self-leadership had a comparatively strong influence on job performance in comparison with locus of control, there is need for senior leadership to emphasise employees' self-leadership if improved job performance is to be sustainably maintained. Even though locus of control should not be ignored completely, more attention should be devoted to self-leadership.

Even though locus of control accounted for a small percentage (i.e. 16.2%) of the variations in job performance of the engineering workforce, this figure could be conceived as critical and cannot be ignored. Because our study did not necessarily differentiate the impact of internal locus of control from external locus of control, it would be important for the management of Eskom to delineate the possible performance differences arising from these forms of locus of control. Specific focus could be paid to environmental conditions (work environment, supervisory approaches, training and development) as they relate to job performance and compare them to performance arising from individual psychological dispositions (personal agency, self-efficacy).

Because considerable variations in job performance were consequences of the combined influence of self-leadership and locus of control, perhaps there is need for Eskom management to consider self-leadership within this organisation in conjunction with locus of control. This can take the form of infusion of components of these constructs into their staff development and training at both managerial and operational levels. Such concepts should be infused into the operational practices of engineers, technologists and technicians within the organisation. For instance, the expression of self-leadership by the engineering workforce may require that Eskom engineers do not only have to cooperate and follow the lead of their superiors but rather demonstrate self-leadership by challenging or resisting problematic and inappropriate leadership strategies implemented by their leaders.

## Limitations and directions for future research

Because the study adopts a survey approach, this may mean that the results might have limited applicability to other related electricity utilities across the country. The sample size and uniqueness of conditions that obtain at Eskom in the Free State may not resonate with those at other power distribution stations. Thus, expanding the focus of investigation to cover other power generators across the country may improve the generalisability of results.

Given that exploratory studies, such as the current one are based on perceptions of respondents from the Eskom workforce at a particular time when the research was conducted, there is no guarantee of replicability of this study in the future as a result of an evolution of staff views

on locus of control and self-leadership as conditions at Eskom change over time. That said, this study can be conceived as an accurate presentation of the perceptions of Eskom, Bloemfontein engineering workforce at the time this study was conducted.

This study focused on only one public power generation and distribution utility. It is important to take into consideration that this power utility, in its own way, is unique from other power utilities in terms of its structure, communication systems and management style. Besides, the study focuses on engineers exclusively. Thus, a larger sample of employees, including senior management, would allow a broader representation of the views on the matters investigated in this study, which will increase the extent of generalisability of results.

## Conclusion

The findings revealed that a combination of self-leadership and internal locus of control is critical to achieving high job performance of engineers. Such performance could emerge from increased proficiency, proactivity and multitasking in the face of competing tasks and work activities. It is recommended that behaviour-focused and constructive thought pattern stratergies need to be aligned with internal locus of control behaviours to guarantee improved job performance of the engineering workforce at Eskom Bloemfontein. Behaviour-focused strategies, which emphasise observation and change of the engineers' own behaviour through primary factor strategies, could emphasise a strong customer orientation through proactive work order handling, prioritisation of customer needs, efficient and effective resource (money, time and energy) allocation, rapid response strategies to field services, fault management, control centre and flexing of work requirements in view of resource constraints. Finally, constructive thought process would cover all the 'head work' required in design engineering, alignment of technical drawings to industrial and ISO (International Organisation for Standardisation) standards, plant life cycle management and maintenance.

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### Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

### Authors' contributions

D.L.M. wrote the article. P.R. reworked the entire article and C.C. edited the final version of the article.

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# Motivational factors for engaging in dirty work entrepreneurship among a sample of African immigrant entrepreneurs in South Africa

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**Orientation:** South Africa is witnessing a large number of African immigrants coming into the country. These immigrants seek formal and informal employment. One sector favoured is 'dirty work' within the informal sector.

**Research purpose:** To investigate the immigrants' motivational factors influencing migration and dirty work entrepreneurship in South Africa.

**Motivation for the study:** Because of the dynamic nature of political and economic circumstances that affect a country's employment options, calls have been made for empirical focus on understanding the career development processes of neglected sample groups such as immigrants and even those engaged in dirty work.

**Research approach/design and method:** A qualitative research approach was utilised based on the narratives and stories of 27 immigrant entrepreneurs in the informal sector engaged in dirty work careers.

**Main findings:** Three narratives emerged as motivating factors for migrating: (1) socio-economic issues, (2) lack of opportunities and (3) experience of a new life. Furthermore, three motivational factors led into dirty work careers: (1) challenges of breaking into formal employment because of immigration rules, (2) motivation from social networks the immigrants belong to and (3) an enterprising spirit, driven by ambition.

**Practical/managerial implications:** Based on the findings, interventions can be proposed to assist not only those engaged in dirty work but also migrants and citizens seeking opportunities in this sector.

**Contribution/value add:** This study advances the literature in dirty work research within a South African context. Further, the study gives currency to an often neglected yet important sample group in dirty work entrepreneurship, who also happen to be immigrants.

## Introduction

Small, micro and medium enterprises (SMMEs) offer great economic value in alleviating poverty (Charman, Petersen, Piper, Liedeman, & Legg, 2017; Peberdy & Rogerson, 2000). Within these enterprises are careers classified as 'dirty work' because of the association taint and precarious connotations that accompany them (Ashforth, Kreiner, Clark, & Fugate, 2017; Budlender & Fauvelle-Aymar, 2014; Hughes, 1958). Informal sector careers such as hairdressing, shoe repairing, vulcanising, masonry and others fall under physical and social dirty work (Ashforth & Kreiner, 2014). As an international trend, South African society perceives dirty work as undesirable and therefore extends the perceived dirty nature of the work to the people who perform it (Ashforth & Kreiner, 2014; Bickmeier, Lopina, & Rogelberg, 2014; Crush, 2011). The associated social stigmatisation devalues both formal and informal sector dirty workers and fosters an inferiority complex (Ashforth et al., 2017; Berkelaar, Buzzanell, Kisselburgh, Tan, & Shen, 2012).

Dirty work careers offer opportunities for a significant number of African immigrants (Hart & Acs, 2011; Vinogradov & Jorgensen, 2017). However, in South Africa, this category of immigrants who are not in the formal sector is stratified and stigma is affixed to them (Crush, 2000; Peberdy & Rogerson, 2000). Therefore immigrants choosing stigmatised career paths suggest underlying motives influencing these choices. Despite the rise in immigrant dirty work entrepreneurship (e.g. Fatoki & Patswaaire, 2012; Kalitanyi & Visser, 2010), notably

little research within a South African context exists. This research seeks to respond to these calls made and contribute towards immigrants' career development processes (Crush, 2017; Greyling, 2016).

## Research purpose and objective

The study explored immigrants' motivational factors in migrating and entrance into dirty work careers in the Eastern Cape Province of South Africa. This became relevant in the following ways. Foremost, dirty work is known to exist and hence such unusual but crucial careers ought to be performed just as mainstream labour (Ashforth & Kreiner, 2014; Miller & Breton-Miller, 2017). In the case of South Africa, Budlender and Fauvelle-Aymar (2014) report that the percentage of immigrants working in the informal sector (where dirty work persists) is almost twice as high as that of citizens. All this supports the arguments for the need to understand the economic gains and important roles played by immigrants in the host country (Neves & Du Toit, 2012; Van den Bergh & Du Plessis, 2012). Secondly, South Africa is currently the largest economy in Africa but it has its own share of unskilled, undereducated and unemployed black and mixed-race citizens whose formal sector prospects are impacted (Broussard, 2017; Statistics South Africa, 2017). Within these groups, those without matric (Grade 12) constitute more than 58% of the unemployment rate (Stats SA, 2013). These citizens may experience socio-economic conditions and hardships often synonymous with immigrants (Broussard, 2017).

Further, the South African informal sector economy has an insignificant impact on the economic development agenda (Charman et al., 2017). There is general lack of interest and readiness to work in precarious working conditions (Budlender & Fauvelle-Aymar, 2014). This may contribute to workforce shortages as well as the marginalisation of dirty workers (Berkelaar et al., 2012). Calls exist for the expansion of informal economic activities and entrepreneurship to stimulate economic growth in marginalised communities (Charman et al., 2017; Crush, 2011). However, the immigrants' dominance in the informal sector and settlements often result in severe hostility manifestations such as xenophobic attacks (Crush, 2000; Kalitanyi & Visser, 2010), hence the need to identify and address factors that may affect the lived experiences of dirty workers. The main research question guiding this study was: What factors (given the South African context) influence entry into the host country and dirty work entrepreneurship in the informal sector?

## Factors influencing immigrant movements

This study uses a push–pull plus concept (Van Hear, Bakewell, & Long, 2017) as one of its theoretical bases. It stresses the significance of different internal and external forces driving international mobility. Several studies have attempted to explain what factors push people out of their country and pull them towards another (Harry, Dodd, & Chinyamurindi, 2017; Selmer & Lauring, 2011; Van Hear et al., 2017). While push factors are internal drivers within the

home country, pull factors are external within the host country. Individuals and the circumstances serving as their motivation for migration vary (Harry et al., 2017). It all depends on the type of individual, demographics, economics, political conditions, ethnicity, race and gender, among others (Pheko, 2014; Selmer & Lauring, 2011).

Studies on skilled African expatriates cite worsening economic and political conditions and stagnant career development as the main push factors and the reverse of such conditions – stability, security and better work environments – form pull factors for migrating (Harry et al., 2017; Van den Bergh & Du Plessis, 2012). Generally, motivation for migrating from less developed countries to a more highly developed one includes escape from adverse situations for employment opportunities, financial success and life change (Harry et al., 2017; Selmer & Lauring, 2011). Given the complexity surrounding push and pull drivers and growing theories, there are arguments for the need for more empirical research into modern-day African immigrants within the context of developing countries (Van Hear et al., 2017). Through this, the role played by motivational factors and their association with dirty work entrepreneurship could be established.

## Factors influencing immigrants' involvement in dirty work

Two models are considered as influencing entry into dirty work. Firstly, the model of entrepreneurial careers (MEC) of Dyer (1994) and second, the model of challenge-based entrepreneurship (MCBE) by Miller and Breton-Miller (2017). In the MEC, career socialisation and the antecedents that influence career choice address immigrants' career dynamics and dilemmas. The antecedents (individual, social and economic) are classified by Dyer (1994) as factors that influence an entrepreneur's career decision-making. Similarly, in the MCBE, four aspects play a role in immigrants' entrepreneurship journey. These are (1) the types of challenges such as socio-cultural, economic, cognitive, physical and emotional; (2) conditions and experiences; (3) adaptive requirements and (4) outcomes. Bridging these models suggests that experiences in struggling to overcome challenges in life may translate into a positive work attitude and discipline.

Dyer (1994, p. 10) notes that people from deprived homes marked with poverty and parental neglect become 'highly impulsive, reject authority figures, have persistent feelings of rejection and isolation'. This leads to inferior linguistic skills and cultural adaptation even if they migrate (Aliaga-Isla & Rialp, 2012; Ruiz, Ibarreche, Peterson, & Guerrero, 2017). On this subject, various literature links adverse economic factors to educational quality and one's ability to find acceptable employment (Bontis, Crossan, & Hulland, 2002; Dimov, 2007). Additionally, immigrants often find themselves outside the mainstream labour markets because of work restrictions, local laws and various hiring practices (Bogan & Darity, 2008; Hart & Acs, 2011). This creates unemployment, a sense of loss and leads to unusual types of

work or consideration of self-employment (Block, Kohn, Miller, & Ullrich, 2015; Masurel, Nijkamp, Tastan, & Vindigni, 2002; Minniti & Nardone, 2006).

When the challenges become conditions, socialisation forms adaptive measures to compensate and reach an outcome (Dyer, 1994; Miller & Breton-Miller, 2017). The need for engaging other individual entrepreneurs has been found as one of the means of seeking social learning in the opportunity development process (Dutta & Crossan, 2005; Kautonen & Palmroos, 2010). An immigrant may appeal to fellow immigrants for vocational aid and social support (Aliaga-Isla & Rialp, 2012; Miller & Breton-Miller, 2017). This gives an indication that life challenges and hardships may induce special entrepreneur conditions for coping with such circumstances.

# Research design

## Research approach

A qualitative research approach based on narratives and stories of individual participants was adopted. This approach brought about the deeper understanding of the immigrants' motivational factors in an expanded form. The strength of qualitative research in studies related to immigrants and entrepreneurship is the enhancement of participants' free flow and expression concerning the phenomenon under-study in their natural setting (Cohen, Manion, & Morrison, 2011; Pheko, 2014). This allowed collection of relevant information from participants because stories 'act in people's lives in ways that matter deeply' (Smith, 2016, p. 202).

## Research strategy

In-depth interviews with probing were conducted to allow individual participants to put their lived experiences in a narrative context for the attainment of the richest source of information (Smith, 2016). Interviewing helped in eliciting 'meaning-making' stories and reflections from those lived experiences and in understanding the rationale behind participants' responses (Chinyamurindi, 2016, 2017; Saldana, 2009).

## Research method

### Sampling and participants

Out of a group of African immigrant owners in dirty work careers operating in East London, 27 participants (19 males and 8 females from 7 different countries) were selected to participate in the research. A non-probability sampling method with a snowball sampling technique was employed in selecting participants (Cohen et al., 2011). The following inclusion and exclusion criteria were used to select participants: (1) a participant had to be self-expatriated, (2) a participant had to establish his or her own dirty work business from scratch and (3) a participant had to be the one responsible for managing such a business. The criteria were further used by the key informants in the recruiting process.

This ensured consistency in the information gathered from the participants' experiences in dirty work. The participants' demographic characteristics are illustrated in Table 1.

### Data collection methods

A carefully developed interview guide with open-ended questions was utilised for the interviews. Prior to every interview, the participants were briefed thoroughly and reassured of their rights and responsibilities in the participation in the research (Miles, Huberman, & Saldana, 2014). The interviews were conducted at times and in places (mostly at the business premises) identified by the participants as convenient. The interviews were conducted between April 2017 and August 2017 and lasted a maximum of 63 min.

## Recording of the data

### Data analysis

Completed transcriptions were imported to QSR NVivo Version 11 for better data management and analysis (Woods, Paulus, Atkins, & Macklin, 2016). The three levels of meaning-making adopted from previous research (Chinyamurindi, 2016, 2017; Harry et al., 2017; Richards, 2015) formed the data analysis procedure. In Level 1, an indwelling process started. Each interview was read and the audio recordings listened to multiple times to understand and connect participants' lived experiences in migration and dirty work (Smith, 2016; Toolis & Hammack, 2015). Stories and structure were identified from the data. Level 2 helped to classify responses into meaningful categories where the factors, their meanings and quotes based on their consistencies across the stories narrated by the individual participants were identified (Chinyamurindi, 2016; Saldana, 2009). Level 3 helped to analyse the content of the narrative accounts gathered as well as the factors that served as themes (Richards, 2015; Saldana, 2009).

### Strategies to ensure data quality and reporting

Strict guidelines were followed to ensure data quality and reporting. Firstly, an interview guide was designed and reviewed by experts and was piloted in the validation process. Secondly, data collection lasted for a 5-month period, which allowed a relaxed atmosphere with adequate researcher reflections and accurate transcription. Data collection stopped only when the researchers were convinced that data saturation was reached, whereby no new information was extracted from the analysis. The researchers checked and verified the factors that emerged to reduce subjectivity and optimise the validity of the analysis as well as the internal reliability of the research (Miles et al., 2014).

## Ethical considerations

This research followed the institutional ethical requirements. Participants were served with letters and consent forms detailing the objectives, confidentiality issues and their right to participation (Miles et al., 2014).

**TABLE 1:** Participant profiles.

| Participant (pseudonym) | Age | Country of origin | Years in South Africa | Highest level of education | Current career |
|---|---|---|---|---|---|
| Amon | 36 | Zimbabwe | 11 | Technical college | Tree felling |
| Seko | 45 | Ghana | 15 | Diploma in Education | Hairdressing |
| Joe | 44 | Zimbabwe | 13 | Technical college | Carpentry |
| Doe | 42 | Ghana | 13 | Highest national diploma | - |
| Diana | 38 | Zambia | 14 | Grade 12 | Hairdressing |
| Shan | 45 | Zimbabwe | 16 | Technical college | Rubble removals |
| Akosua | 36 | Ghana | 7 | Highest national diploma | Hairdressing |
| Victoria | 38 | Ghana | 8 | Grade 12 | Hairdressing |
| Bless | 44 | Nigeria | 8 | Bachelor (honours) | - |
| Isaac | 45 | Ghana | 17 | A level (matric) | Vulcanising |
| Gabriel | 49 | Ghana | 19 | A level (matric) | Hairdressing |
| Chanda | 37 | Zambia | 10 | Grade 11 | Hairdressing |
| Thomas | 38 | Ghana | 12 | Grade 11 | Hairdressing |
| Jefta | 42 | Malawi | 8 | Grade 12 | Masonry |
| Kennit | 45 | Ghana | 5 | Bachelor (honours) | Car washing |
| Prince | 33 | Ghana | 4 | Grade 9 | Carpentry |
| Joseph | 38 | Mozambique | 12 | Grade 9 | Carpentry |
| Jolyn | 36 | Zambia | 11 | Grade 12 | - |
| Patricia | 51 | Ghana | 18 | Grade 9 | Hairdressing |
| Silan | 45 | Cameroon | 15 | Grade 9 | - |
| Moh | 46 | Nigeria | 15 | Diploma in Marine Studies | - |
| Edem | 35 | Ghana | 4 | Technical school | Masonry |
| Alice | 50 | Zambia | 18 | Grade 12 | - |
| Dan | 42 | Ghana | 7 | Grade 9 | - |
| Rosey | 38 | Ghana | 8 | Grade 9 | Hairdressing |
| Alfred | 33 | Zimbabwe | 11 | Form 6 (matric) | Carpentry |
| Ketana | 40 | Mozambique | 12 | Grade 12 | Rubble removal |

# Research results and findings

Drawing from the data analysis, two main findings emerged. While the first finding was the motivating factors for leaving the home country, the second was the motivation to enter into dirty work in the host country. Tables 2 and 3 present the summary of the findings.

## Motivating factors to migrate

Table 2 presents the three considered motivational factors for migrating from the home country. The first two factors can be considered as push factors while the third one forms a pull factor.

The first factor, socio-economic issues, covers the home country's poor economy, poverty, parental and personal hardship, living and financial constraints. This factor was summed up as having influenced most of the participants' education and infringed on their competitive abilities and hence the decision for migrating (see Table 2 for illustrating quotes). The stories of two participants, Victoria and Alfred, can be cited as examples. For Victoria:

'I did finish senior secondary school (matric) and I passed very well but [had] no money to carry on, no opportunities for me. I became eager to travel; you know; my country is hard economically I needed to leave …' (Victoria, female, hairdresser, Ghana)

To Alfred, experiencing hardships because of socio-economic issues coupled with inadequate skill was difficult to manage. He explained:

'Things were bad back home for me and my family … I was facing severe challenges. There was no money, adequate food and resources and I was a bright guy but I couldn't pass form six very well. I didn't get a job back home and I knew that I can get a job when I come to South Africa …' (Alfred, male, carpenter, Zimbabwe)

A second factor motivating participants' decision to migrate was the lack of comparable opportunities especially in the area of jobs and remuneration (more quotes in Table 2). Although some of the participants cited that they were not idle in the home country, most of them perceived better achievements abroad. One participant, Chanda, despite working as a professional hairdresser, felt the limitation in such career and hence sought to relive her shattered dreams elsewhere. In her narration she mentioned:

'In my country those who have [become] established already are fine but some of us who were in the informal business like hairdressing – it's not easy, it [is] just struggling and hand to mouth affairs … so it was difficult to make it big with this hairdressing there.' (Chanda, female, hairdresser, Zambia)

In addition to the two identified factors contributing to participants' decision to migrate, the need for a new life experience outside their home country was cherished.

'I decided to travel because my petty trading business wasn't meeting my dream target. I knew there was no way to overcome all the difficulties and become somebody at home at that time … I used to see those who come from abroad and how they were progressing in life so I was motivated; that is why I'm here and still forcing [myself] to work hard to succeed.' (Kentana, male, rubble removals, Mozambique)

**TABLE 2:** Motivating factors for leaving home country.

| Factor | Meaning | Illustrating quotes |
|---|---|---|
| Socio-economic issues | Financial constraints, home country economic conditions, schooling challenges | 'I dropped out of school due to financial matters and hardship … I hustle to support my parents and siblings so I had to move to SA.' (Thomas, Ghana) |
| | | 'I had some difficulties back home as I was growing up since my parents struggled to look after us. Even school, I stopped along the way because of financial and economic problems.' (Chanda, Zambia) |
| | | 'I [travelled] because the economic situation in my country was bad. I couldn't raise money to start my own business so I always wanted to travel.' (Amon, Zimbabwe) |
| | | 'I was not educated because my father was not able to afford fees and at the same time look after us all (siblings) … and how can I compete with those who have the degrees. I had to find my way out in another country.' (Silan, Cameroon) |
| Lack of opportunities | Unemployment, difficulty in finding a job in home country, low pay | 'I was [impatient] because when I finished my degree I was not finding a job and it was about whom you know so I decided to travel.' (Bless, Nigeria) |
| | | 'I was just helping builders to park their materials and I get some tips (money). So I wasn't doing anything important back home. No job, so things were difficult for me.' (Joseph, Mozambique) |
| | | 'Since I finished my secondary schooling, I spent about 10 years just assisting in my parents' business without finding any job elsewhere. I learnt hairdressing work but I couldn't open my own shop. So I struggled all those years.' (Alice, Zambia) |
| Experience a new life abroad | Desire to turn life around | 'I wanted to travel to make my life better since [the] economic situation was tough and opportunities were not really there for some of us.' (Prince, Ghana) |
| | | 'I found out that I can do better by making more money in [a] hair salon here than in my own country. I knew the economic situation [was] better than back home so my aim was to prosper.' (Diana, Zambia) |
| | | 'I wanted to explore new ground and rebuild my future. Being a teacher in Ghana was no longer rewarding due to [the] economic situation.' (Kennit, Ghana) |
| | | 'After many years of hustling on the street with nothing much to show, I felt [like] crossing the border to turn my situation around. That was exactly what I did in [the] year 2005. At one point [a] man [needs a] bold step to save [his] future.' (Kentana, Mozambique) |

**TABLE 3:** Motivational factors for dirty work.

| Factors | Meaning | Illustrating quotes |
|---|---|---|
| Document constraints | Delays in permit issuing, not meeting requirements | 'When I came I noticed that because of documentation and its requirements I wasn't going to get a soccer team soon, so I started working in a salon.' (Seko, Ghana) |
| | | 'I can say lack of work permit was the first reason I decided to learn this mason job. When I came I needed a job badly to survive … but when they explained the permit requirements and processes, I became discouraged and I opted to learn [masonry] rather.' (Jefta, Malawi) |
| | | 'I had problems with paper [documents] so I was advised to do hair since that was immediate work I can easily do without paper.' (Victoria, Ghana) |
| Social support seeking and acceptance | Reliant on established immigrants for skills and jobs | 'I learned this job here through my [countrywoman] I approached for help and she agreed to work with me.' (Jolyn, Zambia) |
| | | 'When I came I needed [a] job to do but when I was informed about [the] challenges in obtaining [a] formal job, I considered hairdressing and I was accepted in one of the salons of my countrymen where I was taught the skills.' (Gabriel, Ghana) |
| | | 'I did not go to plumbing school to know it. I did learn the practicals by assisting and observing and being trained by my boss.' (Mohammed, Nigeria) |
| | | 'I started working at the salon; although I knew nothing about salon work, I had no paper and no money … I needed to survive … so when I went to my [countrywoman] to accept me and teach me with salon skills, she agreed …' (Prince, Ghana) |
| Enterprising spirit | Desire to earn, low level of contentment, urgency in success | 'You don't get what you want when you work for a company as a carpenter. It's better to be self-employed as it was in my case.' (Joe, Zimbabwe) |
| | | 'I was paid the same amount as starters despite being a professional so I was looking forward to [having] enough savings to quit and start my own business.' (Chanda, Zambia) |
| | | 'When I became perfect I was employed fully although I never thought I [would] be doing ladies' hair … I became the key worker doing all sort of hairstyles and managing affairs, but I was paid less, making it difficult for me to offer support to my families back home so I had to open my own salon.' (Gabriel, Ghana) |

In addition to the illustrating quotes (Table 2) and that of Kentana, the desire to make life better in the host country to compensate for the impacts of experienced socio-economic hardship became a motivational source for migrating.

The study also focused on the motivation for indulging in dirty work entrepreneurship.

## The immigrants' motivational factors in becoming dirty work entrepreneurs

The challenge of breaking into formal employment because of immigration rules became a route to dirty work entrepreneurship. Although prior to migration, some participants anticipated finding jobs in the formal sector, informal sector dirty work became a career option. This was because of lack of meeting work permit requirements or failure to attain documentation on time (illustrating quotes in Table 3). For example, Bless, with his honours degree, had the prospect of finding a befitting job affected. As stated below:

'When I came, acquiring a document became a problem as the policies were changed so often. As things were delayed, I opted to enter into the informal sector and work in the salon rather for the time being while sorting out my documentation … I was thinking I was going to get a job as a banker, teacher or manager in a company but none came my way because of documents delay …' (Bless, male, hairdresser, Nigeria)

This factor influenced the participants' plans, perceptions about careers and their stigma as well as entrepreneurship intentions and behaviours. The story of Prince appears to reveal this:

'I became stranded in a way since I needed to sort out my documentation and at the same time needed money to survive … By the look of things, I found that documentation was a problem as per requirements, a company needs to have your work permit of which at that time I was not having but I knew … I can manage my own small business in the informal sector. I will say I might have entered into the formal sector if I had the document …' (Prince, male, carpenter, Ghana)

The second motivating factor emanated from the social networks immigrants belong to (more quotes in Table 3). Newer immigrants sought support in the form of jobs and skills from the established ones. In return, the established immigrants accepted such requests. The participants (except one) attributed dirty work career involvement to this factor. For example, Joseph arrived without a certificate, skill or capital and lacked valid documents; despite this he turned into a dirty work entrepreneur through others. He explains:

> 'When I came to South Africa in 2005, I joined other foreigners who were doing these jobs already so they took me and taught me how to do [these] carpentry and tiling jobs … I spent about one year three months for carpentry and tiling took me about six months. I then worked with these artisans before I left … Besides that, there was nothing immediate for me to do since I was not having documents.' (Joseph, male, carpenter, Mozambique)

Similarly, Patience, despite being a professional hairstylist before migrating, still had to connect and depend on established immigrants for support. She narrated:

> 'I was a professional hairdresser already … It's just that nobody comes with capital to start a business. So that was why I worked with somebody to get some money to buy the needed tools to start my own salon business … So I worked for someone for a while to get a paper and also to know the market and how things work here.' (Patience, female, hairdresser, Ghana)

Finally, an enterprising spirit driven by ambition (further quotes in Table 3) was a motivating factor paving the way to dirty work entrepreneurship. In all cases, despite being accepted at a place of work at a time of need, participants were still sceptical and eager to break out and establish their own careers. Amon put it succinctly:

> 'When I came, I started working as a chef but in a small business and the salary was not good enough for me to survive. So I left and started working in a construction industry. The pay was not much … Then my Uncle employed me in his tree felling business … I started doing all the jobs but he pays me little portion, so I said to myself, why can't I do my own thing to be my own boss? So I bought one machine to start with.' (Amon, male, tree felling, Zimbabwe)

Drawing from the strong desire to succeed in the host country, in some instances, participants such as Prince relied on income analysis discourse as a measure to influence the rationale to become self-employed. He said:

> 'I started from the salon working for somebody but I felt that I was underpaid and cheated in a way. I did my own analysis from the income we were generating at the salon and how much I was paid, so this motivated me to take the necessary steps to save and leave and set up my own business and utilise my main skill …' (Prince, male, carpenter, Ghana)

Even participants such as Shan who had once had a formal job discontinued it because of the urgent zeal to succeed. He narrated:

> 'When art business was bad, I looked for employment in the formal sector as a driver, but there too the salary was not good

so after two years I decided to be self-employed so that I can make something for myself. I didn't want to be addicted to this small monthly salary and job, because there could be retrenchment, or the business can collapse, and then I can get stuck in life … So I started this rubble removals business in 2006.' (Shan, male, rubble removal, Zimbabwe)

The main motivating factor was the search for greater financial independence and individual economic stability en route to overturning past experiences of hardship. Hence, dirty work entrepreneurship forms part of their economic emancipation.

# Discussion
## Outline of the findings

This study investigated the motivating factors of African immigrants leaving their home countries for South Africa. These factors are as follows: (1) socio-economic issues, (2) lack of competitive opportunities and (3) the desire to experience a new life abroad. Their interactions, experiences and relationships with adverse circumstances in their home country called for migration in order to redefine their life. The motivating factors for being involved in dirty work career entrepreneurship are (1) problems with immigration paperwork, (2) social network involvement and (3) an enterprising spirit. Thus, the document challenges encountered forced the participants to make use of their social networks and the need to be independent dirty work entrepreneurs was drawn from ambitious enterprising spirit. Although the former factors served as push factors for leaving home countries and the later formed the pull factors for being dirty workers in the host country, great challenges formed part of the immigrants' successful stories in adaptability.

## Relating main findings to the literature

In this study, the adverse socio-economic conditions experienced by the participants influenced the decision to migrate, and this is consistent with previous studies. People, especially those from less developed countries, migrate to disassociate themselves from challenges faced in the home country (Harry et al., 2017; Van den Bergh & Du Plessis, 2012). However, political factors were not considered as a push factor by the participants, as they were by skilled immigrants (Harry et al., 2017); rather the participants emphasised the role of perceived poor economic status in their home countries coupled with socio-economic hardships. This factor also contributed to educational constraint (Bontis et al., 2002) as many participants failed to realise their educational potential. The lack of opportunities also topped up as a push factor (Van Hear et al., 2017). It reinforced participants' internal desires to self-migrate (Harry et al., 2017) and formed the roadmap for justifying the pull factors from the host country. This confirms prior findings that employment, financial and improved living prospects motivate immigrants to migrate (Harry et al., 2017; Selmer & Lauring, 2011).

As demonstrated in previous studies, the lack of work permits excluded and restricted the participants from formal jobs (Bogan & Darity, 2008; Minniti & Nardone, 2006). Perhaps this is because the sample generally was unskilled immigrants. However, in this study, permits were not a prerequisite for hiring by established immigrant managers, through whom the participants were absorbed into informal sector dirty work careers. This is well supported by studies that place unemployment and illegality among the primary factors of immigrants becoming entrepreneurs out of necessity (Block et al., 2015; Bontis et al., 2002).

In line with the literature, the social networks provided immigrants with informal training and learning (Aliaga-Isla & Rialp, 2012), skill acquisition and enhancement (Kautonen & Palmroos, 2010), employment and information sharing (Masurel et al., 2002; Ruiz et al., 2017). However, engagement with their social networks became a temporary mechanism for coping with challenges. Documentation shortfall, the inability to fit into corporate jobs because of inadequate skills and education and lack of initial capital to set up business in the informal sector influenced this association. In addition, because the social network was deemed as a last resort, the participants fully utilised the opportunities therein to develop their dirty work careers. According to theories, challenges faced in their home and host countries evoked action, shaped their attitude towards reality and forced them to meet those challenges with social networking and hard work (Dimov, 2007; Miller & Breton-Miller, 2017).

For an immigrant to become an independent entrepreneur out of necessity requires an enterprising spirit (Block et al., 2015) solely driven by strong ambition. Uniquely to this study, the participants considered this factor to breed the breakout attributes driving their self-employment prospects. These attributes included vigorous analysis of (1) income and expenditure, (2) remuneration and work effort and (3) employment and stability, as well as positive jealousy (desire to reach the employer's position), discontentment and a sense of urgency regarding success. Their considerations accelerated the participants' motives for skill, knowledge and resource acquisition while employed so that they could then take on high risk endeavours in dirty work. These attributes might explain why immigrants dominate informal sector activities in the host country over citizens (Budlender & Fauvelle-Armar, 2014). This current research adds that immigrants remain more dissatisfied as dirty work employees than by the associated distasteful nature of the employment; however, their satisfaction is restored when they become self-employed in dirty work.

## Practical implication

Many countries, including developing ones, are experiencing an influx of unskilled and undereducated international immigrants (Fatoki & Patswawairi; 2012; Vinogradov & Jorgensen, 2017). However, they should not be viewed in a negative light but as a valuable human resource with a hidden talent for vital dirty work entrepreneurship. The immigrants lacked adequate skills, advanced educational qualifications, financial capital upon arrival and battled with barriers in the host country. However, from their account, within an average of three years, they advanced in dirty work careers. This valuable ability to deal with unwelcome situations may encourage citizens or immigrants seeking access to a new life.

Inspiration could be drawn from the immigrants' utilisation of social networks to learn, perfect skills and accumulate resources (Aliaga-Isla & Rialp, 2012; Ruiz et al., 2017). In addition, the significance attached to dirty work employment irrespective of little remuneration and greater taint (Ashforth et al., 2017) with the aim of tapping it for informal learning opportunities is worth adapting. This is an essential factor for citizens without or with matric but with no skills or formal employment to consider.

The enterprising spirit as narrated could be used as an empowerment tool for breaking the circle of the 'once employed remained employed' attitude of some people. Importantly, having knowledge about the depth of constraints immigrants' experience, their resilience, strategies and motivations for overcoming such difficulties may equip people in similar circumstances. It may lead to alteration of hostile perceptions harboured against them and help to expand SMME economic activities in the informal sector (Charman et al., 2017).

As a heterogeneous group, immigrants require future research to deeply and widely look into their motivating factors for surviving in host countries without becoming homeless. With this, it could be established how this wealth of entrepreneurship characteristics became ingrained in this category of immigrants. This is essential because this research suggests that African immigrants fine-tune their innate entrepreneurship characteristics to easily adapt to dirty work careers in the host country.

## Limitations

The findings of this research should be cautiously interpreted and applied but are not generalisable based on some limitations. Firstly, the sample consisted of immigrants (who happened to be unskilled) from only seven different African countries residing in South Africa, with varying cultural situations. Secondly, the dirty work businesses from which participants were selected were SMMEs with very few (involving five or fewer) employees, and those businesses varied in nature. Thirdly, only three locations in one town, mainly composed of African immigrant businesses, made up the demographic. Furthermore, only participants known to have established businesses and managed them by themselves were involved in the study.

## Conclusion

Currently, because of advances in communication systems and human interactions, opportunities are easily spotted from abroad and this has led to migration between developed

and developing countries. Many skilled or unskilled individuals can easily self-migrate. As a result, many unskilled and undereducated migrants have joined dirty work careers. However, research about this category of immigrants in this type of career is still limited. This study contributes to the understanding of the motivating factors underlying the decision to migrate and participate in dirty work entrepreneurship as a career path in South Africa. This research finding lays the basis for future research on immigrants and dirty work.

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## Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

## Authors' contributions

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# Undergraduate students' perceptions of factors affecting job satisfaction

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**Orientation:** Globally, people engage in work and sell their services to an organisation in exchange for compensation. This compensation can have a significant effect on employees' attitude towards their work, resulting in either job satisfaction or job dissatisfaction. A high level of job satisfaction can increase organisational effectiveness and, subsequently, the organisation's performance, whereas job dissatisfaction can cause employees to be less motivated, which can in turn decrease their productivity, effectiveness and individual performance.

**Research purpose:** This study was conducted with the aim to investigate undergraduate students' perceptions of the factors affecting job satisfaction.

**Motivation for the study:** Currently, there is a paucity of published research on the views of undergraduate students on the factors affecting job satisfaction.

**Research approach/design and method:** The study took a positivistic research approach, and a quantitative design was used. A stratified quota sampling technique was employed to select the respondents for the study; a certain quota was met in terms of race, gender and faculty of study. In total, 270 undergraduate students participated in the study.

**Main findings:** The empirical results indicated no significant association between the demographic variables (previous work experience, gender, race and field of study) and almost all occupational dimensions of job satisfaction, working conditions and recognition. However, medium to large positive relations were measured between the dimensions of job satisfaction, working conditions and recognition. It was evident from the study that all the dimensions measured are considered important for obtaining job satisfaction in the workplace.

**Practical and managerial implications:** It is important for managers to get an understanding of the views of young people on work-related issues in order to create an understanding of young people's needs and aspirations, as they are the future permanent labour force, managers and leaders of a country.

**Contribution/value-add**: The study brought to light the views of undergraduate students on the factors affecting job satisfaction.

## Introduction

Globally, people engage in work to receive rewards that help satisfy their needs. Therefore, employees 'sell' their services to an organisation in exchange for compensation (Jiang, Xiao, Qi, & Xiao, 2009). Compensation includes a cash component (salary, merit increases, bonuses, stock options and other incentives) and benefits (e.g. health and unemployment insurance) (Noe, Hollenbeck, Gerhart, & Wright, 2012). This compensation can have a significant effect on employees' attitude towards their work, influencing individuals to be satisfied or dissatisfied with their jobs (Milkovich, Newman, & Gerhart, 2011).

Job satisfaction refers to employees' subjective attitude towards their job (Aziri, 2011; Gazioglu & Tansel, 2006; Nel et al., 2014). It is regarded as the emotional reaction an individual experiences through comparing the desired outcomes with the actual outcomes (Rothman, 2001). Therefore, 'job satisfaction describes a positive feeling about a job, resulting from an evaluation of its characteristics' (Robbins, Judge, Odendaal, & Roodt, 2009, p. 74).

There are certain factors that can influence individuals' behaviours and attitudes towards their job, which can subsequently result in either job satisfaction or job dissatisfaction (Malik, Nawab, Naeem, & Danish, 2010). These factors include, among others, salary, promotion, workload,

working conditions, the nature of the work and motivation (Hayes, Bonner, & Pryor, 2010; Lumley, Coetzee, Tladinyane, & Ferreira, 2011). If employees are satisfied with most of the factors they consider relevant, job satisfaction will be experienced (Werner, Bagraim, Cunningham, Potgieter, & Viedge, 2016).

Job satisfaction is important for both organisations and the individual (Moynihan & Pandey, 2007). A high level of job satisfaction can increase organisational effectiveness and, subsequently, the organisation's performance, whereas job dissatisfaction can cause employees to be less motivated, which can in turn decrease their productivity, effectiveness and individual performance (Alam & Mohammad, 2010; Aziri, 2011; Moynihan & Pandey, 2007). Meyer et al. (2012, p. 99) postulate that 'in most South African companies there is a lack of job satisfaction', resulting in 'a low level of employee commitment to performance and the achievement of organisational goals' with the following symptoms: 'low productivity, high absenteeism, labour unrest, industrial action and high labour turnover'.

The exit–voice–loyalty–neglect framework indicates the consequences of job dissatisfaction (Robbins et al., 2009). The framework indicates four ways in which an individual may react towards job dissatisfaction. Firstly, an individual might feel the need to leave the organisation, which may include looking for a new position as well as resigning (exit response). Secondly, an individual might try to actively and constructively improve conditions by engaging with the organisation (voice response). Thirdly, an individual might passively and optimistically wait for conditions to improve without seeking a new position (loyalty response). Lastly, an individual might begin to passively and destructively allow conditions to worsen, including chronic absenteeism or lateness, reduced effort and an increase in mistakes in work tasks (neglect response) (Robbins et al., 2009; Werner et al., 2016).

This study was conducted with the aim to investigate undergraduate students' perceptions of the factors affecting job satisfaction, as they will soon enter the working environment on a more permanent basis. Currently, there is a paucity of published research on the views of undergraduate students on work-related issues, such as factors affecting job satisfaction. The research study supplies managers with a perspective from students who are yet to enter a working environment. A recent research study conducted by Jiang and Alexakis (2017) comparing students' and managers' perceptions of essential entry-level management competencies revealed that managers and students have different perceptions regarding entry-level management competencies. It is subsequently important for managers to get an understanding of the views of young people on work-related issues in order to create an understanding of young people's needs and aspirations, as they will be future employees. The results of this research study provide managers with the necessary information regarding undergraduate students' expectations of the required entry-level managerial competencies.

## Purpose

The purpose of the study on which this article reports was to determine the extent to which perceptions of occupational dimensions influence undergraduate students' perceptions of job satisfaction.

## Literature review

The literature review discusses theoretical explanations of job satisfaction as well as variables (occupational dimensions) of job satisfaction.

### Theoretical explanations of job satisfaction

There are strong overlapping characteristics between theories relating to job satisfaction and theories relating to human motivation, as both focus on the movement of workers to act in a desired manner (Tietjen & Meyers, 1998, as cited in De Jager, 2015). Employee motivational factors can be divided into extrinsic and intrinsic factors. The content of an individual's job, such as the individual's responsibilities, free will or autonomy, skills and supervision, relates to the individual's intrinsic satisfaction and encompasses the qualitative attributes of an individual's job (Rose, 2001, as cited in Chatzoglou, Vraimaki, Komsiou, Polychrou, & Diamantidis, 2011). On the other hand, the individual's working environment is concomitant to extrinsic satisfaction and includes the individual's working hours, opportunities for promotion, safety, rewards and bonuses, among others (Rose, 2001, as cited in Chatzoglou et al., 2011). Goetz et al. (2012) depict job satisfaction as the extent to which individuals' intrinsic and extrinsic aspects of their job influence them to feel negative or positive towards their job, subsequently describing the attitudes that individuals have towards their jobs. The following theories attempt to explain job satisfaction: Maslow's hierarchy of needs theory, Herzberg's motivation hygiene theory, McClelland's acquired needs theory, Alderfer's existence, relatedness and growth (ERG) theory, Locke's value-percept theory and the job characteristics model. This study aimed to explore the undergraduate students' perceptions of occupational dimensions and job satisfaction, and therefore the following theories are discussed as they informed the development of the measuring instrument used: Maslow's hierarchy of needs theory, Herzberg's motivation hygiene theory and Alderfer's ERG theory.

### Maslow's hierarchy of needs theory

Theories that attempted to explain the concept of job satisfaction began with Maslow's hierarchy of needs theory in 1943 (De Jager, 2015). Abraham H. Maslow, a clinical psychologist, developed this theory after years of observing his patients (Werner et al., 2016). Maslow argued that human beings have several needs, which can be categorised in a hierarchy based on importance for survival. The author divided human needs into five main categories. The lowest level contains the most basic needs that must be met before higher order needs emerge and become important to the individual (Nel et al., 2014). Maslow's hierarchy of needs includes the following: psychological needs (lowest order needs), safety needs (second level of needs), social needs

(third level of needs), esteem needs (fourth level of needs) and self-actualisation needs (highest level of needs; the need for self-fulfilment) (Werner et al., 2016).

### Herzberg's motivation hygiene theory

Frederick Herzberg modified Maslow's hierarchy of needs theory and developed the dual-structure theory, also known as the two-factor motivation theory, in 1959 (De Jager, 2015). Herzberg identified two sets of factors that influence motivation and job satisfaction, namely hygiene factors and motivators (Nel et al., 2014). Hygiene factors are related to the working environment and include organisational policy and administration; equipment; supervision; interpersonal relationships with colleagues, superiors and subordinates; salary; status; working conditions; and work security. On the other hand, motivational factors (or motivators) include achievement, recognition, the job itself (how meaningful, interesting and challenging it is), progress or growth (learning and developing), responsibility and feedback (Nel et al., 2014).

Hygiene factors aim to prevent an individual's bad feelings, or job dissatisfaction, but do not necessarily lead to job satisfaction, whereas motivation factors aim to achieve job satisfaction (Dartey-Baah & Amoako, 2011; Tan & Waheed, 2011). Herzberg's theory argues that an individual is more likely to experience job satisfaction in a working environment with a high level of hygiene and motivational factors (Dartey-Baah & Amoako, 2011; Malik, 2011; Watson, 2012).

Herzberg's theory can be linked to Maslow's hierarchy of needs theory. Hygiene factors relate to the lower level needs in the hierarchy and motivational factors to the higher level needs (Nel et al., 2014).

### Alderfer's existence, relatedness and growth theory

Clayton Alderfer's ERG theory, developed in 1972, is closely related to Maslow's hierarchy of needs theory (Grobler, Wärnich, Carrell, Elbert, & Hatfield, 2011; Werner et al., 2016). The E, R and G refer to three basic human need categories, namely, existence needs, relatedness needs and growth needs. Existence needs refer to a person's physical and material needs and are similar to the physiological and safety needs (first and second level of needs) in Maslow's hierarchy. Relatedness needs are equivalent to Maslow's social needs (third level of needs). Growth needs refer to the individual's desire to be productive and creative and are parallel to Maslow's needs for self-esteem and self-actualisation (higher level needs) (Werner et al., 2016).

Alderfer described two forms of movement through his hierarchy: satisfaction-progression (movement up the hierarchy) and frustration-regression (movement down the hierarchy). The satisfaction-progression movement relates to Maslow's theory. The frustration-regression movement describes what happens when a person's need is frustrated at the higher level. This may lead to movement down the hierarchy as a person's satisfaction at the next level is frustrated (Werner et al., 2016).

## Variables of job satisfaction

In the past, numerous researchers examined different demographic and work-related variables in an attempt to explain levels of job satisfaction.

### Demographic variables

Demographics of employees are strong determinants of the level of job satisfaction (Al-Zoubi, 2012). For this particular study, gender, race, field of study and previous work experience were measured and are discussed.

Gender differences in job satisfaction have been reported in various studies (Gazioglu & Tansel, 2006; Hersch & Xiao, 2016; Moyes, Shao, & Newsome, 2008; Sabharwal & Corley, 2009). The literature suggests that women are more satisfied than men with their jobs (Gazioglu & Tansel, 2006; Hersch & Xiao, 2016), despite still being subjected to discriminatory practices in the workplace such as lower pay and fewer opportunities for advancement. Some possible explanations for this tendency include gender differences in values, job expectations and labour force participation rates (Hersch & Xiao, 2016). Moyes et al. (2008) emphasise the impact of gender differences on employment values and assert that women value the intrinsic attributes of the job more, including the social and emotional aspects of place of employment, positive relations with peers and job contentment. In contrast, men value the extrinsic attributes of the job more, such as high salaries, opportunities for advancement, job security and work independence (Moyes et al., 2008). This view is also confirmed by Sabharwal and Corley (2009). Abu-Saad and Isralowitz (1997) argue that women are traditionally socialised to be less occupation-orientated, but that female students who identify less with traditional gender values tend to be more orientated towards occupational environments. Abu-Saad and Isralowitz (1997) conducted research focusing on the influence of gender on work values among undergraduate students. The authors did not discover any consistent patterns regarding gender differences in terms of perceptions of job satisfaction. They did, however, discover that married male students are significantly more career-orientated than married female students (Abu-Saad & Isralowitz, 1997).

Stoermer, Hitotsuyanagi-Hansel and Froese (2017) highlight the importance of focusing on the relationship between race and job satisfaction in order to maximise the efficiency of an organisation. According to Stoermer et al. (2017), various previous studies focused on the relationship between race and job satisfaction, where these studies reported mixed, and sometimes contradictory, results. Hersch and Xiao (2016) found that black and Asian workers experience lower levels of job satisfaction than white workers; however, little inquiry has been launched into this racial differentiation. Contradictory findings were reported by Friday and Friday (2003, as cited in Stoermer et al., 2017), indicating that higher levels of job satisfaction were reported by black employees. Stoermer et al. (2017) found that black employees experience indefinite amounts of racial discrimination in the South African context,

which in turn results in the experience of job dissatisfaction. Hoppe, Fujishiro and Heaney (2014) indicate that, as minority groups, racial identities such as black and Hispanic identities experience increasing levels of job satisfaction if they have the same racial co-workers. Koh, Shen and Lee (2016) indicate the differences between white and black individual job satisfaction as higher than the difference between white and other racial experiences of job satisfaction. Josiam et al. (2009) conducted a study that focused on the work attitudes of Generation Y students, as the perceptions of students before they experience the working environment can influence how they experience the working environment. The authors found that there are no significant racial differences in the perceptions of these students, although these findings are based on the context of developed countries (Josiam et al., 2009).

Wu and Norman (2006) identified a relationship between students' field of study and job satisfaction and reported that undergraduate nursing students fear the nursing environment as a result of its high turnover rates, which can subsequently lead to job dissatisfaction. West et al. (2014) indicate that medical interns report high levels of job dissatisfaction. Liu (2017) indicates that higher levels of job satisfaction are experienced by accounting interns. A research study focusing on psychology undergraduate students and work variables conducted by Levin and Stokes (1989) indicated that negative affectivity, such as a poor self-esteem and negative emotions, can negatively influence perceptions of the working environment and overall satisfaction.

Various authors identified a relationship between previous work experience and job satisfaction (Chang, Ma, Chiu, Lin, & Lee, 2009; Kardam & Rangnekar, 2012). Literature suggests that individuals with previous work experience have higher levels of job satisfaction because they have already experienced the difficulty of shifting jobs (Kardam & Rangnekar, 2012). Elfering, Odoni and Meier (2016) indicate that the relationship between previous work experience and the level of job satisfaction experienced by employees is largely maintained by the emotional experiences attached to the previous working environment. Resick, Baltes and Shantz (2007) conducted research on work decisions and attitudes. The authors found that previous work experience influences preconceived ideas about the working environment and working expectations. These ideas or perceptions might be different from the reality of the next working environment students enter and might subsequently lead to lower levels of satisfaction (Resick et al., 2007).

### Work-related variables

Work-related variables relate to the work itself and its attributes (Chatzoglou et al., 2011) and also include the characteristics of work that result in intrinsic and/or extrinsic satisfaction.

According to Grobler et al. (2011), the most important factors (most surveyed employees reported) contributing to job satisfaction are regarded as the following:

- the job itself, including the kind of work employees perform (challenging or interesting) and the freedom allowed in terms of how the work is performed (Gazioglu & Tansel, 2006; Millán, Hessels, Thurik, & Aguado, 2013; Shin & Jung, 2014; Skaalvik & Skaalvik, 2014)
- quality co-worker relations, including the extent to which an individual is accepted as part of a work unit as well as the friendliness and support of fellow colleagues (Millán et al., 2013; Pan, 2015; Smith, 2015; Tang, Siu, & Cheung, 2014)
- good supervision, including aspects such as fairness, helpfulness, competency and effectiveness (Fu & Deshpande, 2014; Pan, 2015; Smith, 2015)
- opportunity to grow, which includes advancement opportunities (Hanna, Kee, & Robertson, 2017; Hartman, Rutherford, Feinberg, & Anderson, 2014; Proudfoot & Lind, 2015; Smith, 2015).

Grobler et al. (2011) further assert that the most frequently reported factors that diminish job satisfaction are the following:

- poor supervisory practices, such as unfair, biased treatment, failure to listen and respond to employees' concerns and problems with management's communication credibility (Fu & Deshpande, 2014; Mathieu, Neumann, Hare, & Babiak, 2014; Pan, 2015)
- interpersonal conflict, including lack of teamwork, unfriendly colleagues and rivalry among managers and supervisors (Pan, 2015; Smith, 2015; Tang et al., 2014)
- poor working environment, involving dirty, noisy, unsafe and unhealthy working conditions (Dul, Ceylan, & Jaspers, 2011; Valentine, Godkin, Fleischman, & Kidwell, 2011)
- low, uncompetitive pay (Chowdhary, 2013; Ingram, 2015; Judge, Weiss, Kammeyer-Mueller, & Hulin, 2017).

# Research methodology

## Research approach

This study took a positivistic research approach. Positivist research aims to explore, explain, evaluate, predict and develop or test theories (Sarantakos, 2013). A quantitative design was used, which supplied the study with direction as well as certain procedures (Creswell, 2009). A quantitative study applies attention to gaining knowledge objectively and systematically through deductive reasoning and generalisation (Sousa, Driessnack, & Mendes, 2007). The research aimed to retrieve information concerning undergraduate students' perceptions of occupational dimensions and job satisfaction and quantified these results through the use of numbers (see O'Leary, 2013).

## Population and sample

The population used for this study consisted of undergraduate students of one of the campuses of a South African university. The study employed a stratified quota sampling technique; respondents were randomly selected from the population. The sample consisted of 270 undergraduate students based on the campus. A certain quota was met in terms of race, gender and faculty of study. Table 1 presents the survey population frame.

**TABLE 1:** Survey population frame.

| Race | Total sample | | | | | | For which field of study are you currently registered? | | | | | | | | | | | | | | | | | | | | | | | | |
| | Total | | Male | | Female | | 1 Health: Nursing/ pharmaceutical | | | | 2 Engineering | | | | 3 B Com (all) | | | | 4 BSC (other) | | | | 5 BA (excluding Psychology/ social work) | | | | 6 Psychology/social work | | | |
| | | | | | | | 1 Male | | 2 Female | | 1 Male | | 2 Female | | 1 Male | | 2 Female | | 1 Male | | 2 Female | | 1 Male | | 2 Female | | 1 Male | | 2 Female | |
| | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % | No | % |
| Black | 64 | 24.0 | 33 | 24.0 | 31 | 23.0 | 8 | 47.1 | 9 | 52.9 | 6 | 66.7 | 3 | 33.3 | 3 | 33.3 | 6 | 66.7 | 3 | 42.9 | 4 | 57.1 | 4 | 100.0 | 0 | 0.0 | 9 | 50.0 | 9 | 50.0 |
| White | 99 | 37.0 | 48 | 35.0 | 51 | 38.0 | 10 | 45.5 | 12 | 54.5 | 4 | 33.3 | 8 | 66.7 | 8 | 66.7 | 4 | 33.3 | 5 | 35.7 | 9 | 64.3 | 10 | 55.6 | 8 | 44.4 | 11 | 52.4 | 10 | 47.6 |
| Indian | 37 | 14.0 | 19 | 14.0 | 18 | 13.0 | 2 | 25.0 | 6 | 75 | 5 | 100.0 | 0 | 0.0 | 3 | 50.0 | 3 | 50.0 | 3 | 75.0 | 1 | 25.0 | 4 | 44.4 | 5 | 55.6 | 2 | 40.0 | 3 | 60.0 |
| Coloured | 62 | 23.0 | 33 | 24.0 | 29 | 22.0 | 8 | 53.3 | 7 | 46.7 | 4 | 50.0 | 4 | 50.0 | 2 | 40.0 | 3 | 60.0 | 7 | 70.0 | 3 | 30.0 | 5 | 55.6 | 4 | 44.4 | 7 | 46.7 | 8 | 53.3 |
| Other | 8 | 3.0 | 3 | 2.0 | 5 | 4.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 0 | 0.0 | 1 | 100.0 | 0 | 0.0 | 1 | 50.0 | 1 | 50.0 | 1 | 33.3 | 2 | 66.7 | 0 | 0.0 | 1 | 100.0 |
| Total | 270 | 100.0 | 136 | 50.0 | 134 | 50.0 | 28 | 44.0 | 35 | 56.0 | 19 | 56.0 | 15 | 44.0 | 17 | 52.0 | 16 | 48.0 | 19 | 51.0 | 18 | 49.0 | 24 | 56.0 | 19 | 44.0 | 29 | 48.0 | 31 | 52.0 |

*Source*: Van der Schyff, R. (2016). *The relationship between undergraduate students' perceptions of occupational dimensions and undergraduate students' perceptions of job satisfaction*. Mini-dissertation – Honours. Potchefstroom: North-West University. p.14.

The sample was equally divided between the gender groups (50% male and 50% female respondents). Furthermore, it consisted of 23.3% nursing or pharmaceutical students, 12.6% engineering students, 12.2% economic and management sciences students, 13.7% natural sciences students, 15.9% human and social sciences students and 22.2% psychology or social work students. It was also evident from the sample that the majority of the students (57%) were exposed to working environments of some kind (permanent, full-time, casual, clerical, technical, voluntary and pharmacy assistance).

## Data collection strategy

Data were collected through face-to-face surveys, using a self-constructed coded questionnaire that consisted of a 5-point Likert-type scale, ranging from very strongly disagree (1) to very strongly agree (5). Administering a questionnaire has several advantages, including the following: higher response rates can be attained, the number of 'do not knows' and 'no answers' is generally decreased and the interviewer can clarify misunderstanding of the intent of the questions, thereby ensuring relevant responses (Babbie & Mouton, 2009).

## Analysis and reporting

The data gathered were processed with the Statistical Package for the Social Sciences (SPSS Version 24). A factor analysis was conducted to explore the underlying structure of job satisfaction, working conditions and recognition. Cronbach's alpha coefficient was used to determine internal reliability. Furthermore, descriptive statistics, correlations, *t*-tests and ANOVAs were used to analyse the data. Cohen's *d*-values were used as effect size to determine whether differences in means were important in practice, where $d = 0.2$ were considered as small, $d = 0.5$ as medium and $d = 0.8$ as large effects (Cohen, 1988). Cohen (1988) suggested that correlations of 0.1, 0.3 and 0.5 can be interpreted as small, medium and large correlations, respectively.

## Limitations of the research design

The study focused on undergraduate students studying on one campus of a South African university, excluding the other two campuses. Subsequently, the results of the study cannot be generalised to all undergraduate students of the university. Furthermore, not all students were exposed to real working environments and this may also have influenced the results.

## Ethical consideration

This research study was formally approved by the Ethics Committee of the Faculty of Arts of one of the campuses of a South African university. The researchers also adhered to the correct ethical standards. The researchers scheduled appointments with the sampled respondents in their free time. The face-to-face interviews were administered, privately, in specific offices of the university allocated to the researchers.

Each respondent signed an informed consent form permitting the researcher to include them in the research. The informed consent form clarified the purpose of the study as well as the nature of the research and ensured the privacy, anonymity and confidentiality of the respondents. No student was forced to participate in the study and they were informed that they could withdraw from the study at any time. It is of extreme importance to protect respondents from any harm, be it physical, cognitive or emotional (Ritchie, Lewis, Nicholls, & Ormston, 2013); these ethical considerations were also taken into account while conducting the research.

# Empirical results

This section provides the empirical results of the research.

## Validity and reliability

### Job satisfaction

An exploratory factor analysis was conducted on the 26 self-constructed Likert-type scale items measuring perceptions of job satisfaction. Principal component analysis and oblimin rotation were used. This was meant to determine the dimensionality of the job satisfaction instrument used. The Kaiser–Meyer–Olkin test (KMO) measured 0.93 and indicated that the sample size was adequate for factor analysis. The $p$-value of Bartlett's test of sphericity returned a value smaller than 0.05, suggesting that the correlation between statements was sufficient for factor analysis (see Field, 2005). Five factors (management and leadership needs, wellness, emotional needs, advancement and dignity) were extracted through Kaiser's criteria (see Field, 2005) that explain 60.67% of the total variance. The factor loadings of the management and leadership needs factor ranged from 0.457 to 0.903, the wellness factor from 0.531 to 0.825, the emotional needs factor from 0.401 to 0.798 and the advancement factor from 0.576 to 0.821. Only one question loaded on the dignity factor with a factor loading of 0.814.

The Cronbach's alpha coefficient for the management and leadership needs and emotional needs factors calculated 0.92 and 0.84, respectively, which is well above the required 0.70, and show high reliability and internal consistency. The wellness factor showed a Cronbach's alpha coefficient of 0.62, which could be regarded as an acceptable reliability. The advancement factor had a Cronbach's alpha coefficient of 0.51, which could be regarded as a relatively low reliability. This was caused by the low number of statements, namely two in the factor. The mean inter-item correlation was 0.382, which is sufficient according to Clark and Watson (1995). Only one item loaded on the dignity factor, therefore Cronbach's alpha was not applicable.

The means scores of all five factors were four and above, indicating that on average the respondents held the opinion that the items contained in the five factors will be regarded as factors that will contribute to students' job satisfaction in their future working environments. The following response categories were used: 1 = very strongly disagree; 2 = fairly strongly disagree; 3 = agree; 4 = fairly strongly agree and 5 = very strongly agree.

## Working conditions

A factor analysis was conducted on the nine self-constructed Likert-type scale items measuring perceptions of working conditions. Principal component analysis and oblimin rotation were used. The KMO measured 0.86, indicating that the sample size was adequate for factor analysis. The $p$-value of Bartlett's test of sphericity returned a value smaller than 0.05, suggesting that the correlation between statements was sufficient for factor analysis (see Field, 2005). Only one factor (working conditions) was extracted through Kaiser's criteria (see Field, 2005) that explains 55.86% of the total variance. The factor loading ranged from 0.671 to 0.828.

The Cronbach's alpha coefficient of the working conditions factor was 0.90, indicating high reliability and internal consistency. The factor mean was 4.55, indicating that a large majority of respondents thought that the items contained in the factor are regarded as aspects contributing to appropriate working conditions. The following response categories were used: 1 = very strongly disagree; 2 = fairly strongly disagree; 3 = agree; 4 = fairly strongly agree and 5 = very strongly agree.

## Recognition

A factor analysis was conducted on the six self-constructed Likert-type scale items measuring underlying dimensions of perceptions of appropriate working conditions. Principal component analysis and oblimin rotation were used. The KMO measured 0.80, which indicated that the sample size was adequate for factor analysis. The $p$-value of Bartlett's test of sphericity returned a value smaller than 0.05, suggesting that the correlation between statements was sufficient for factor analysis (see Field, 2005). Two factors (extrinsic rewards and intrinsic rewards) were extracted through Kaiser's criteria (see Field, 2005) that explain 73.49% of the total variance. The factor loadings of the extrinsic rewards factor ranged from 0.736 to 0.941 and the intrinsic rewards factor from 0.782 to 0.855.

The Cronbach's alpha coefficient of the extrinsic and intrinsic rewards factors were 0.86 and 0.75, respectively, indicating high reliability and internal consistency. The mean scores were 4.16 for extrinsic rewards and 3.96 for intrinsic rewards, indicating that a large majority of respondents held the opinion that the items contained in the factors are regarded as factors contributing to recognition. However, on average, the respondents were in higher agreement with extrinsic rewards than intrinsic rewards. The following response categories were used: 1 = very strongly disagree; 2 = fairly strongly disagree; 3 = agree; 4 = fairly strongly agree and 5 = very strongly agree.

## Correlations between job satisfaction, working conditions and recognition

The correlations between job satisfaction, working conditions and recognition are reflected in Table 2. Medium to large positive correlations between 0.30 and 0.77 were found between the five dimensions of job satisfaction. Working

**TABLE 2:** Correlations between job satisfaction, working conditions and recognition.

| Factors | Management and leadership needs | | | Wellness | | | Emotional | | | Advancement | | | Dignity | | | Working conditions | | | Intrinsic rewards | | | Extrinsic rewards | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N | Correlation coefficient | Sig. (2-tailed) | N |
| Management and leadership needs | 1.000 | - | 270 | [c]0.593‡ | 0 | 270 | [c]0.771‡ | 0 | 270 | [b]0.450‡ | 0 | 270 | [c]0.565‡ | 0 | 270 | [c]0.667‡ | 0 | 270 | [b]0.386‡ | 0 | 270 | [b]0.405‡ | 0 | 270 |
| Wellness | [c]0.593‡ | 0 | 270 | 1.0000 | - | 270 | [c]0.669‡ | 0 | 270 | [b]0.353‡ | 0 | 270 | [b]0.387‡ | 0 | 270 | [b]0.425‡ | 0 | 270 | [b]0.300‡ | 0 | 270 | [a]0.248‡ | 0 | 270 |
| Emotional | [c]0.771‡ | 0 | 270 | [c]0.669‡ | 0 | 270 | 1.000 | - | 270 | [b]0.390‡ | 0 | 270 | [b]0.445‡ | 0 | 270 | 0.539‡ | 0 | 270 | [b]0.308‡ | 0 | 270 | [b]0.327‡ | 0 | 270 |
| Advancement | [b]0.450‡ | 0 | 270 | [b]0.353‡ | 0 | 270 | [b]0.390‡ | 0 | 270 | 1.000 | - | 270 | [b]0.297‡ | 0 | 270 | [b]0.355‡ | 0 | 270 | [b]0.312‡ | 0 | 270 | [b]0.328‡ | 0 | 270 |
| Dignity | [c]0.565‡ | 0 | 270 | [b]0.387‡ | 0 | 270 | [b]0.445‡ | 0 | 270 | [b]0.297‡ | 0 | 270 | 1.000 | - | 270 | [c]0.749‡ | 0 | 270 | 0.318‡ | 0 | 270 | 0.247‡ | 0 | 270 |

†, Correlation is significant at the 0.05 level (2-tailed); ‡, correlation is significant at the 0.01 level (2-tailed).

[a], Small effect: $r = 0.1$.

[b], medium effect: $r = 0.3$.

[c], large effect: $r > 0.5$.

conditions had moderate to large positive correlations with all job satisfaction dimensions, varying between 0.355 (advancement factor) and 0.749 (dignity factor). Intrinsic rewards as well as the extrinsic rewards showed moderate positive correlations with all the dimensions of job satisfaction.

### Effect of previous work experience on job satisfaction, working conditions and recognition

From the results of the $t$-test, it is evident that the $p$-values for all the dimensions of job satisfaction as well as intrinsic rewards and working conditions were 0.05 or higher, indicating that there were no statistically significant differences between the means of respondents with and without previous work experience and job satisfaction, working conditions and intrinsic rewards. The effect sizes for all these dimensions indicated a small effect, varying from 0.02 to 0.22. However, the $t$-test showed significant differences for the extrinsic rewards factor ($p = 0.007$), where respondents without previous work experience placed more emphasis ($M = 4.34$) on extrinsic rewards than those with work experience ($M = 4.05$). However, the effect was small ($d = 0.31$).

### Effect of gender on job satisfaction, working conditions and recognition

The results of the $t$-test indicated no statistically significant differences between the means of men and women and job satisfaction, working conditions and recognition. The $p$-value for all the dimensions (or factors) measured above 0.2. Furthermore, the effect sizes also indicated a small effect between the dimensions (or factors), varying between 0.00 (working conditions) and 0.15 (advancement).

### Effect of race on job satisfaction, working conditions and recognition

From the results of the ANOVA, it was evident that the $p$-values for four of the dimensions of job satisfaction (management and leadership needs factor, wellness, emotional needs and dignity) as well as working conditions, intrinsic and extrinsic rewards were above 0.05, indicating no statistically significant differences between the means of different race groups. However, the means of advancement differed statistically significantly ($p = 0.006$), where white respondents ($M = 3.75$) had a lower perception of advancement than black respondents ($M = 4.2$, $d = 0.52$) as well as mixed-race and Indian ($M$ of both $= 4.08$, $d = 0.39$) respondents.

### Effect of field of study on job satisfaction, working conditions and recognition

The results of the ANOVA indicated no statistically significant differences between the means of the various dimensions for different study fields, as the $p$-values were above 0.05 in all instances. The results of the effect sizes, for all fields of studies and the dimensions of job satisfaction, working conditions and recognition indicated a small to medium effect.

## Discussion

This research aimed to determine the extent to which perceptions of occupational dimensions influence undergraduate students' perceptions of job satisfaction.

A factor analysis was conducted on the scale items measuring perceptions of job satisfaction, working conditions and recognition. Five factors (management and leadership needs, wellness, emotional needs, advancement and dignity) were extracted and used to measure dimensions of job satisfaction, one factor to measure working conditions and two factors (extrinsic and intrinsic rewards) to measure recognition. Cronbach's coefficient alpha was used to determine the internal reliability of the scales. All values were above the required 0.70, except for the wellness (0.62) and advancement (0.51) factors. This was probably caused by the low number of statements in the factors; however, the mean inter-item correlations (wellness 0.303; advancement 0.382) were sufficient (see Clark & Watson, 1995).

Regarding job satisfaction, the respondents agreed that the various items contained in the five factors (management and leadership needs: mean = 4.58, wellness: mean = 4.23, emotional needs: mean = 4.56, advancement: mean = 3.99 and dignity: mean = 4.47) were considered important for obtaining job satisfaction. The statements contained in the various dimensions (or factors) also relate to attributes of the job itself, quality co-worker relations, good supervision and the opportunity to grow, which are all considered as the most important factors contributing to job satisfaction in the workplace, as also indicated in the literature review. The advancement factor achieved the lowest mean score (3.99), although still high on the scale varying from 1 (very strongly disagree) to 5 (very strong agree), indicating that advancement opportunities are essential, but are considered less important than all the other dimensions. The management and leadership needs as well as emotional needs were perceived as the most important job satisfaction factors. The results are in line with the findings of the literature review, which indicated that quality co-worker relations (the extent to which an individual is accepted as part of a work unit and the friendliness and support of fellow colleagues) (Millán et al., 2013; Pan, 2015; Smith, 2015; Tang et al., 2014) and good supervision (including fairness, helpfulness, competency and effectiveness) (Fu & Deshpande, 2014; Pan, 2015; Smith, 2015) are considered important factors for job satisfaction. Furthermore, poor supervisory practices (unfair, biased treatment, failure to listen and respond to employees' concerns and poor communication) (Fu & Deshpande, 2014; Mathieu et al., 2014; Pan, 2015) and interpersonal conflict (lack of teamwork, unfriendly colleagues) (Pan, 2015; Smith, 2015; Tang et al., 2014) are considered as key factors that diminish job satisfaction.

From the demographic section, four items (previous work experience, gender, race and field of study) were used to measure their effect on the dimensions of job satisfaction, working conditions and recognition. These were tested using

$t$-tests, ANOVAs and effect sizes. The empirical results indicated very few significant differences between the means of the mentioned demographic groups and the dimensions of job satisfaction, working conditions and recognition. The effect sizes also indicated medium to small effects. However, the extrinsic rewards factor differed significantly for respondents with and without previous work experience ($p = 0.007$), although the effect was small ($d = 0.31$). It indicated that respondents with no work experience on average tend to seek more extrinsic rewards (mean = 4.34) than those with work experience (mean = 4.05). This finding is consistent with Maslow's theory, which argues that the most basic needs must be met before higher order needs can emerge and become important to the individual (Nel et al., 2014). Extrinsic rewards are also related to the existence needs of Alderfer's ERG theory, which refers to a person's physical and material needs (Werner et al., 2016). Students with no work experience tend to relate recognition in the workplace to extrinsic rewards more than students with work experience, which include performance-based bonuses, salary increases and promotions. Furthermore, the advancement factor differed significantly for different race groups ($p = 0.006$). The results of the effect size showed a medium effect ($d = 0.39$ to $0.52$), where on average white respondents were less positive (mean = 3.75) about advancement than other races (means larger than 4). Therefore, although promotion and advancement opportunities are considered as crucial factors to obtain job satisfaction, black, Indian and mixed-race respondents considered it more important than white respondents.

It is therefore clear from the findings of this research that most demographic variables did not have a significant effect on the dimensions of job satisfaction, working conditions and recognition. This might be because a large number of the respondents (undergraduate students) who participated in this study have not experienced a real working environment yet. Their views of what would satisfy them in their future working environments are only based on their own perceptions thereof.

With regard to the relationships between job satisfaction, working conditions and recognition, significant relationships were found between all the dimensions; the $p$-value measured < 0.001. Therefore, it can be deduced that all the dimensions were considered important by the students for obtaining job satisfaction in the workplace. This finding is consistent with Herzberg's motivation hygiene theory, which argues that in addition to hygiene factors, motivational factors should be present before satisfaction can be produced and people can be motivated to perform well (Dartey-Baah & Amoako, 2011; Malik, 2011; Watson, 2012). The items included in the management and leadership needs, advancement, working conditions and extrinsic rewards factors relate to hygiene factors. Items comprising the wellness, emotional needs, dignity and intrinsic rewards factors relate to motivational factors. Furthermore, medium to large positive correlations (between 0.297 and 0.77) were found between almost all the dimensions, except between the extrinsic rewards and the

wellness (0.248) and dignity factors (0.247), which indicated relatively small correlations. Therefore, extrinsic rewards are considered less important for wellness and dignity in the workplace.

## Limitations

The sample of the study only included undergraduate students. Therefore, not all students included in the sample were exposed to the working environment yet; 57% of the respondents indicated that they had previous work experience. Therefore, the research was generally based on the perceptions of students' future working environments (regarding the factors affecting job satisfaction) and not based on the actual experience of the working environment itself.

# Recommendations

In the light of the findings of the study, the following recommendations are made. In order to receive a more accurate and reliable response, as well as for the study to apply to a greater context, the study could subsequently be carried out with a larger population and sample, also including other universities. The results of the research study will then be based on a broader spectrum of students' perceptions regarding the factors affecting job satisfaction.

Furthermore, as a result of economic constraints, many students are obliged to undertake some kind of work, either part-time or full-time, to sustain themselves during their undergraduate and postgraduate studies. Working conditions (such as working hours, payment and access to mandatory and voluntary benefits) are often problematic. As students are the future permanent labour force, managers and leaders of a country, it is important that their engagement with the world of work be a positive experience. Therefore, it is recommended that further studies be conducted to measure students' perceptions of job satisfaction in various employment fields, such as nursing, accounting, engineering and service industries (restaurants, transport, etc.). South Africa's young people will in due course shape its future and they have the potential to accelerate growth and encourage development for the country. It is therefore of utmost importance that organisations, in general, and human resource managers, specifically, understand the factors that may have an impact on a country's human capital and may inhibit them to thrive.

## Conclusion

This researched study aimed to determine the relationship between occupational dimensions and undergraduate students' perceptions of the factors affecting job satisfaction. Although the demographic variables (previous work experience, gender, race and field of study) indicated limited significant associations with almost all dimensions of job satisfaction, working conditions and recognition, medium to large positive correlations were found between all the dimensions. Therefore, it can be deduced, on average, that all the dimensions (management and leadership needs, wellness, emotional needs, advancement, dignity, working conditions, intrinsic and extrinsic rewards) are considered important by undergraduate students for obtaining job satisfaction in the workplace.

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## Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

## Authors' contributions

R.V.D.S. conducted the literature review as well as the empirical research. D.B. acted as the supervisor of the research project, assisted with the literature review and the empirical research and wrote up the article. S.E. conducted the statistical analysis and reviewed the article.

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# Designing a coaching intervention to support leaders promoted into senior positions

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**Orientation:** Coaching is sometimes used in organisations to assist and support people when they are promoted into senior leadership positions. These coaching interventions are not optimally designed.

**Research purpose:** The objective of this research was to investigate how a transition coaching intervention should be designed to cater specifically for people promoted into senior leadership positions.

**Motivation for the study:** Leaders face daunting challenges when promoted into a senior position. Coaching could offer powerful support, but very little research exists on how to design a transition coaching intervention specifically aimed at supporting recently promoted senior leaders.

**Research design, approach and method:** A constructivist, grounded theory approach using purposeful, theoretical sampling was used to identify 16 participants (recently promoted senior leaders, coaches, Human Resource [HR] partners and a line manager) from various organisations with whom open-ended interviews were conducted on their experiences of coaching during a transition.

**Main findings:** Transition coaching is used reactively, started too late and was not continued for long enough. Transition coaching design should take cognisance of coach–coachee matching; goal setting that includes the organisation's goals; location of coaching session (away from the office); should include reflection and active experimentation; and use assessments and involving the line manager, mentors and the new leader's team in the process.

**Practical and managerial implications:** The findings of this research provide practical recommendations for applying coaching during transitions into senior leadership positions and may be useful to human resource practitioners when designing leadership support and succession planning interventions.

**Contribution and value added:** To address the serious and real possibility of failure once leaders are promoted, and to optimise the time and money spent on coaching during career transitions, this research provides insight into the design and execution of tailor-made transition coaching interventions to help recently promoted senior leaders succeed in their new role.

## Introduction

### Problem statement

#### Key focus

When leaders are promoted into senior positions[1] they face serious challenges. Many fail to meet their objectives (Martin, 2015) or underperform (Sutton, 2008). Coaching is a strategy that is sometimes used to support recently promoted leaders, but there is a lack of empirical research around how a coaching intervention should be designed specifically to support career transitions. This research presents findings relating to when and how coaching should be used during senior career transitions and makes recommendations regarding tailoring a transition coaching intervention for senior career transitions.

### Background

Building sustainable businesses is a challenge faced by many organisations today. A key element of organisational sustainability is effective leadership on all levels in the organisation and

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1.The term 'senior leaders' in the context of this research refers to C-level executives and heads of business units up to two levels below the C level.

especially at senior levels (Charan, Drotter & Noel, 2011), and yet there is a serious shortage of effective organisational leaders in the world (Freedman, 2011; Oliver & Page, 2017). The fast pace of corporate expansion requires leaders in organisations to move to new leadership levels at increasing speeds (Charan et al., 2011) and while many attempt the transition, fewer than a third fulfil their objectives (Martin, 2015) and up to 46% underperform (Sutton, 2008). A study conducted by Watkins (2009) showed that 87% of Human Resource (HR) professionals consider career transitions to be the most challenging event in a manager's career.

A career transition occurs when a leader is promoted to a more senior level in the organisation with more and different responsibilities. This occurs as a result of personal growth and ambition or structural changes in the workplace (Chinyamurindi, 2012). A senior career transition poses numerous challenges to the individual and the organisation. The incumbent is expected to 'hit the ground running' and complete the transition quickly (Sutton, 2008; Watkins, 2003); deal with higher levels of complexity and uncertainty (Dotlich, Noel & Walker, 2004); work with longer time horizons (Jaques, 1996); and step out of the comfort zone of a specialist to take on strategic challenges (Peltier, 2010). There is also pressure on organisations to develop attractive employee value propositions to retain talented leaders, especially in the South African context (Nzukuma & Bussin, 2011).

In order to support recently promoted senior leaders, organisations employ a number of support strategies including leadership development programmes, mentoring and coaching (Kombarakaran, Yang, Baker & Fernandes, 2008). Coaching has been shown to be an effective leadership development tool (Peltier, 2010; Theeboom, Beersma & Van Vianen, 2013), but the explicit use of transition coaching during promotion to a senior position has received little attention with only one empirical study found (Reynolds, 2011).

## Research objectives

The question this study asks is: 'How should a coaching intervention be designed to explicitly support leaders who are promoted into senior positions?' To answer this question, there were two research objectives: firstly, to understand how and when coaching should be initiated during a career transition and secondly, to understand what aspects must be present during the coaching processes to optimally support recently promoted senior leaders.

## Contribution to field

South Africa faces a shortage of skilled senior leaders in the corporate world (Nzukuma & Bussin, 2011). The emerging field of coaching potentially offers a way to support recently promoted leaders, but very little empirical research has been conducted to understand how transition coaching can be employed during senior career transitions. This study may

benefit designers of leadership development and support programmes, recently promoted senior leaders and coaches and coach trainers by providing specific guidelines for designing and conducting transition coaching for senior leaders.

## Literature review

Leadership development theory with a focus on career transitions and coaching theory with a focus on transition coaching form the theoretical underpinnings of this research. This section reviews recent relevant publications in these fields and shows the significance of the challenges faced by recently promoted leaders, as well as the lack of empirical research on transition coaching.

### Leadership development and transitions

Several theories of leadership career transitions, leadership levels and leadership developmental stages exist. The well-known 'Leadership Pipeline' model brought attention to the fact that there are different levels of leadership within an organisation with each level requiring different skills. Leaders transition through six levels: managing self, managing other, managing managers, functional managers, business managers, group manager and enterprise manager (Charan et al., 2011). Each stage requires leaders to let go of certain thinking and behavioural patterns and learn new ones. The focus of this research is career transitions at the higher end of this pipeline, including business, group and enterprise managers. At these levels, leaders have to learn to deal with higher levels of complexity and take a more strategic organisational view. The chances of failure at these senior levels are high and the impact of failure is significantly damaging to both the individual and the organisation (Manderscheid & Ardichvili, 2008; Martin & Gentry, 2011). Ensuring a successful transition therefore becomes an imperative and further highlights the need for support in the form of interventions such as transition coaching.

A different perspective on leadership levels is Jaques' Stratified Systems Theory that defines work in organisations in seven strata on a basis of decision-making complexity where each level of work is related to the time span required by the executor of the task to complete the task (Jaques, 1996). This theory supports the view of Charan et al. that different skills and abilities are required by leaders operating at different levels and reinforces the view that change and transformation are required to successfully execute at a new level. By implication then, if a leader is promoted to the next level, the leader needs to adapt to the new level and will face challenges.

Some of the challenges faced by newly promoted senior leaders include their need to develop new patterns of thinking and behaving (Charan et al., 2011); their need to develop advanced interpersonal and social skills (Kets de Vries, 2006; Lombardo & Eichinger, 1995); moving from operational to strategic mode (Bebb, 2009); fear, anxiety and

self-doubt (Argyris, 1991); lack of emotional intelligence (Goleman, 1996); lack of follow-through and overdependence (Denton & Van Lill, 2006); loss of identity, balancing people and tasks (Hawkins & Smith, 2013); misjudging the new situation and the leader's strengths and vulnerabilities (Watkins, 2003); and getting buy-in from their new team (Martin, 2015).

Leaders' abilities to cope at higher levels are linked to their abilities to perceive and manage complexity. Rooke and Torbert provide a framework that outlines seven levels of developmental action logics: Opportunist, Diplomat, Expert, Achiever, Individualist, Strategist and Alchemist. Each level represents a higher level of development (Rooke & Torbert, 2005). Kegan distinguishes between orders of complexity and people's ability to cope with the increased complexity with his object–subject principle. He asserts that people are capable of managing only a certain level of complexity at a given time and that they require assistance to master the next level. Lack of support during transitions to the next level of complexity may result in suffering (Kegan, 1994) as well as low morale and financial loss (Martin & Gentry, 2011). The potentially traumatic nature of transitions clearly opens the space for considered support such as transition coaching.

In summary, significant theory exists regarding leadership and job levels and the challenges faced during the transition to a higher level.

### Coaching

To support leaders-in-transition, organisations are increasingly implementing leadership development programmes (Kates & Downey, 2005). Coaching is one form of support offered (Weinstock, 2011); however, although development of leaders is often stated by organisations as one of their primary concerns, there is debate as to whether enough is done to put words into action (Avolio & Hannah, 2008).

Executive coaching is a short-term interactive process between a coach and a leader aimed at improving leadership effectiveness by enhancing self-awareness and the practice of new behaviours (Kombarakaran et al., 2008). Transition coaching is a relatively new field of coaching. It is a specialisation of executive coaching that aims to facilitate career transitions by helping leaders identify critical issues they face as a result of the transition; define the expectations of their stakeholders; gain an outside perspective on their new role; and communicate more effectively within the organisation (Witherspoon & Cannon, 2004).

Transition coaching can play an important role in accelerating job transition (Sutton, 2008). Important considerations for transition coaching include the timing of coaching, the specific role of the coach, taking into account the business realities during the personal journey, understanding what skills and behaviours are required, increasing self-awareness, establishing goals and creating an action plan (Sutton, 2008).

Research investigating the role of transition coaching is limited with only one empirical study found thus far (Reynolds, 2011) and to our knowledge no such research has been published in the South African context. Reynolds used an Interpretative Phenomenological Analysis approach with a sample of six recently promoted senior leaders, to explore the meaning that coaching had for them during their transition. The findings include evidence that coaching assists transitioning leaders in overcoming a sense of vulnerability, developing new personal, social and cognitive skills and finding new meaning and purpose in their lives. The research was limited to senior leaders and did not include the view of coaches, HR practitioners and line managers as is the case in this study. Reynold's study also did not report on the coaching process but concentrated on the outcomes of the coaching only.

It is evident from literature that transition coaching could potentially play an important role during career transitions, but limited empirical research has been conducted on how the transition coaching process should be designed.

## Research design

### Research approach

This interpretevist qualitative study employed a constructivist grounded theory approach (Charmaz, 2014). The interpretevist paradigm is purported by numerous scholars in the field of social research as an appropriate paradigm to uncover social truths as is the case in this study and therefore an appropriate research approach (Babbie & Mouton, 2001; Creswell, 2003; Dreher, 1994; Willis, 2007). Grounded theory was selected as specfic methodology because of the lack of existing theory on transition coaching (Goulding, 2002). The research followed the process suggested in grounded theory whereby a theory is developed that is grounded in data that are systematically gathered and analysed according to a specific process. The theory evolves during the research process itself and is a product of continuous interplay between analysis and data collection (Glaser & Strauss, 1967; Strauss & Corbin, 1990).

### Research method

#### Research setting

Participants were interviewed face-to-face as well as via telephone, given the remote location of some participants relative to the researcher and given the paucity of senior leaders who received coaching during their transition.

#### Sampling

Purposeful, theoretical sampling, consistent with the requirements of grounded theory research, was used to identify 16 participants from various organisations (Strauss & Corbin, 1990). Practically, this implied starting with the most likely source of data (a recently transitioned senior leader known to the researcher), leading on to coaches who practised transition coaching, followed by the custodians of coaching in organisations and concluding with line managers of

recently promoted senior leaders. The sampling strategy was informed by the outcome of the constant analysis and comparison process prescribed by grounded theory (Charmaz, 2014). In total eight senior leaders, five coaches, two HR practitioners and one line manager were interviewed in that order. The sequencing of interviews was deliberate and led to insights starting from the most direct (transitioning leader) to the least directly impacted (line manager). This sampling strategy collected data in accordance with grounded theory principles of constant data collection, analysis and comparison, giving preference to the richest source of data needed next to address the research question at hand (Charmaz, 2014). Although gender and race were not specific inclusion criteria in this study, all four SA racial groups (white, coloured, Indian and black) and equal gender grouping were represented in the sample.

### Entrée and establishing researcher roles

Access to the recently promoted senior leaders was gained either through direct connection with the researcher or via the companies' HR departments. In the case of the latter, official permission was obtained from the head of HR of the organisation. Coaches, HR practitioners and the line manager were sourced from the researcher's personal network. In all cases the participants signed informed consent forms.

## Data collection methods

Open-ended interviews, lasting approximately 1 h were conducted with each participant individually. Interview questions included high-level questions, followed by prompts around how participants experienced the coaching process and what aspects of the coaching worked or did not work for them. Interviews were digitally recorded, transcribed and analysed. Analysis and memo writing occurred after each interview to inform the interview strategy and questions for the next participant in accordance with grounded theory principles of constant comparison and theoretical sampling (Charmaz, 2014; Goulding, 2002). As an example, in the first interview the recently promoted senior leader made a distinction between being promoted internally versus externally. While this concept was not part of the original interview prompts, the coding and memo writing process following this interview revealed the potential importance of this phenomenon. This led the researcher to consciously enquire about this in subsequent interviews.

## Data analyses

Grounded theory allows for a number of different data analysis options (Goulding, 2002). In this study line-by-line coding, focussed coding and category identification through extensive memo writing were followed (Charmaz, 2014).

Throughout the research the core principles of grounded theory were employed, namely, theoretically sensitive coding, constant comparison and theoretical sampling (Glaser & Strauss, 1967). This implied going back into the field to re-interview certain participants as new themes emerged

(Strauss & Corbin, 1990). As an example, during the fifth interview a senior leader remarked how important the use of theoretical frameworks was in his coaching. During the coding of this interview (carried out straight after the interview) and the subsequent update of the memo, a new theme emerged that led the researcher to re-interview some of the participants in order to obtain their view on this aspect.

The qualitative analysis software application Atlas.TI was used for the analysis process. To ensure data quality, the transcribed interviews were sent back to the participants for member checking (Lincoln & Guba, 1985). A researcher's diary was also kept to help keep track of the research process and to apply reflexivity.

# Findings

The findings from the analysis of the 16 interviews with recently promoted senior leaders (P1 to P8), coaches (C1 to C5), HR practitioners (HR1 and HR2) and a line manager (M1) were grouped into two themes in line with the research objectives: initiating coaching and the coaching process itself.

## Initiating coaching

The phenomenon of initiating transition coaching contains five sub-themes as summarised in Table 1.

### Timing

Irrespective of whether the idea of coaching was initiated by the recently promoted senior leader (P1, P5) or their line managers (P2, P3, P4, P6, P7, P8), in all instances it was undertaken when the incumbent had already shown signs of distress in the new role. This points to the fact that transition coaching is not something that organisations take seriously and apply in a pre-emptive manner. It seems to be used for remedial effect. C1 notes that the transition coaching she has done has been almost accidental as part of a 'brushstroke' approach by organisations to coaching their leaders, not specifically aimed at transitioning leaders. This is especially true for internally promoted senior leaders. In one instance, C2 only became involved 6 years after a promotion when issues of the person not adjusting to the new role reached crisis levels: 'It is not front of mind for a company to say we are promoting you therefore we think you should get the support' (C2, female, Coach). HR1's company has no specific

**TABLE 1:** Theme 1: Initiating coaching.

| Sub-theme | Key insights |
| --- | --- |
| 1. Timing of coaching | Coaching starts too late; no explicit transition coaching; coaching used for remedial effect; coaching should start before the transition. |
| 2. Duration of coaching | Interventions are too short (< 6 months); coaching is expensive; more frequent coaching immediately after transition; less frequent sessions for up to 18 months to 3 years later on. |
| 3. Selecting a coach | Coachee should be given options; personal connection between coach and coachee is important. |
| 4. Logistics | Off-site (away from office) coaching is preferable; coach and coachee must be pragmatic and flexible. |
| 5. Contracting | Three-way contract between coachee, coach and organisation needed; Coach–coachee confidentiality is important to the exclusion of the organisation. |

process for assigning a coach to a newly promoted senior leader. Instead the business can request a coach at any time, so it is up to the line manager to decide whether the incumbent needs a coach. Alternatively, if a person is nominated for a leadership development programme they may encounter coaching as part of design, but this is not necessarily linked to a promotion.

The question of whether to initiate the coaching before or after the promotion drew varied responses. On the one hand, P4, P6, C3 and M1 felt that coaching should start before the promotion. These participants agreed that there should be between one and five sessions before the promotion, a number of sessions in short succession shortly afterwards and then fewer and more spread out sessions for ongoing support for up to 2 years (M1, P1, P5, P6). C3 warned that transition coaching must be pre-emptive: 'we tend to only look for help when there's a burning platform' (C3, male, Coach). This is echoed by M1:

> if you are going to put your feet wrong – you are going to do it right there in the early stages where you want to set the agenda. You want to set the scene. You do not want to make mistakes before you have even started. (M1, female, Manager of transitioning leaders)

Those who think that coaching should only start after the candidate enters the role (P7, C1, HR2) have different reasons for stating this. P7 feels that the candidate needs to spend a few months in the new position to understand what they are struggling with in order to optimise the coaching. C1 was concerned that transition coaching before a promotion could be confused with career coaching while HR2 was worried that transition coaching before a promotion could have legal implications should the promotion not materialise. C3 provides a pragmatic solution to this: 'coaching should start as soon as the news is broken' (C3, male, Coach).

### Duration

While all the participants interviewed were unanimous that transition coaching should continue for an extended period of time of up to 3 years (HR2), only one participant experienced such an extended intervention of 18 months which he considered to be very beneficial to his learning process.

Most of the participants reported interventions ranging between 6 and 10 sessions over a period of less than a year. It was felt that this is inadequate:

> Typically we sort of put a 12 week intervention or maybe put a 6 month intervention in but we never talk about the 2 year and 3 year period. Unfortunately, I think coaching is great and it has its place, but I think we still think too tactically about the learning journey. (HR2, female, HR practitioner)

> Behaviour doesn't change in 12 months. (M1, female, Manager of transitioning leaders)

The reasons for these limited interventions were cited as cost and a misunderstanding of the transition and transformation process. In HR2's experience there is a perception from line

managers that if the incumbent has not 'made it after six months on the job as a leader then we shouldn't have promoted him' (HR2, female, HR practitioner).

Suggested solutions include initial frequent coaching sessions (every 2 weeks) for the first 3 months to assist with immediate issues and then less frequent sessions of once a month or even 2 months for up to at least 18 months, but preferably up to 3 years.

### Coach selection

The process of selecting a coach varied between organisations. In most cases the coachee was given a choice of coaches either through an interview process or a so-called chemistry session (P3, P5), or by reviewing coaches' CVs (P8). HR2's organisation uses a panel of coaches and assigns a coach based on a specific skills-set needed in the intervention. The importance of coach selection was highlighted by P7 (an actuary) who stated that it was very important to him that his coach had the ability to think analytically and conceptually. The coach he selected was an engineer.

### Logistics

The issue of where and what time coaching should take place elicited varied responses. P1 preferred a location far away from work in a relaxed environment such as a restaurant or hotel and at a time of day that was convenient. The neutral location energised him sufficiently to allow him to engage in the coaching. P2 on the other hand was coached at her office, but she does feel that it would have been better to be coached away from the office as she would have felt more free to talk about 'what is bothering her'. P4 concurred that even though he was coached at the office he would have preferred to be out of the 'buzz' of the office. P5 and P7 experienced both in and out of the office scenarios and both preferred the off-site location.

It would appear from the responses that off-site coaching is preferable, but C1 sums it up well when she states that: '… it is up to the coachee to make the call on what suits them and for the coach to be flexible and accommodating' (C1, female, Coach).

### Contracting

All the coaches reported going through a contracting phase. In all cases there was at least one session at the start where an organisational representative provided input into the coaching process. There were some variations. C1 has two sessions with the organisation, one at the start to set goals and one at the end to provide feedback, although she has observed that for executive-level coachees the organisations seem to be less involved in the coaching process.

The importance of confidentiality during the contracting phase and throughout the intervention is stressed:

> The client might think you are in cahoots with the organisation and they might want to use you to do performance management. (C2, female, Coach)

I never meet – except for the first conversation that they ask me they want me to coach so and so. After that I never meet alone with any of the organisational representatives. Never. That creates suspicion. The minute you talk it creates suspicion. (C4, female, Coach)

## The coaching process

The coaching process theme yielded four sub-themes (Table 2).

### Managing the coaching process

Goal setting emerged as an important part of the transition coaching process. Coaching goals provided structure (P1, P4) and helped coachees stay accountable:

> … once you kind of put it down on a piece of paper, even if it was only your piece of paper, it suddenly becomes much more tangible … Just writing it down is incredibly powerful. (P5, male, Transitioning leader)

C3 uses goal setting as a standard practice to involve line managers indirectly in the coaching process:

> They (line managers) are the ones who see you dropping the ball in the areas you want to develop. So if you're lacking assertiveness and in the next Exco meeting you're not speaking up then they can hold you accountable. (C3, male, Coach)

Two coachees felt strongly about the benefits of their coaches summarising the coaching sessions and sharing this with them. P5's coach created a two- to three-page, typed summary after each coaching session. This was useful to him in that it allowed him to reflect on the coaching session between sessions, as well as serving as a reminder of coaching goals. Even after the coaching ended, P5 was using the coaching summaries (comprising some 40 pages) to remind himself of his journey and his progress to date. For P7 the summaries acted as reference to books and resources he could consult.

Active experimentation emerged as a strong sub-theme (P1, P2, P3, P6, P7, P8). P8 experimented with body and verbal language. P6 practised in a mirror to overcome her public shyness. P7 provided another example:

> Go into a meeting and try and come out of it with the other party feeling: I love this guy. Or go into a meeting and try and get the

guy at the end going you really struck me as someone with very high EQ. (P7, male, Transitioning leader)

Reflection was used in various ways including obtaining clarity of thinking (P3), identifying alternative solutions (P4), feeling unjudged (P5) and creating awareness of positive thoughts (P6). C1 distinguishes between assisted reflection, led by the coach and self-reflection, performed by the coachee outside of the coaching sessions. C4 uses reflection to close the active experimentation learning loop.

In general, there seems to be a pattern of the coaching, creating awareness in the client, of the need to change, encouraging the client to practise and experiment with different behaviours to see what works and finally to reflect back in the coaching session on what worked or did not work and the reasons for it (C1, C2, C3, C4).

### Using theory

A number of participants valued the inclusion of theoretical models and frameworks in the coaching process by their coaches. Coaches shared cognitive behavioural theory (P1), leadership theory (P4), video clips (P5) and the Leadership Pipeline model (C1). For P7 as a technically minded individual it was crucial that his coach provided him with theoretical frameworks to allow him to understand what process he was undergoing. Socratic questioning helped him to listen to people instead of telling them what to do.

A number of participants reported using psychometric assessments as input into the coaching process. This include 360-degree review, Enneagram, Myers-Briggs, Insights, Organic scorecard and repertoire grid to name a few. The benefits of these assessments range from comfort that my coach knows me (P7), increased self-awareness (P8, C3, C5) and getting the coaching 'unstuck' (C4).

### Consulting external parties

The classical three-way meeting between the coach, coachee and line manager at the start of the coaching process to align on goals and at the end to provide feedback were present in a number of instances (P1, P3, P5, C1, C3). For C3: 'If the line manager does not enforce the shift to the desired behaviour it probably won't happen' (C3, male, Coach). HR1 feels it is sufficient to receive occasional feedback from the coach while HR2 feels that the organisation should take a backseat as the results of the coaching should be visible. If not she will intervene:

> I am not seeing the behaviour. I am not seeing the values demonstration. I am not seeing the strategic thinking. I am not seeing the connectedness with people, whatever the case may be. Those tell-tale signs should then say – okay coach I need to check in. (HR2, female, HR practitioner)

While being coached, some coachees found it useful to have a mentor. For some this was a formal process (P2) where their line manager appointed an internal mentor to support their transition, while for others it was an informal process. It

**TABLE 2:** Theme 2: The coaching process.

| Sub-theme | Key insights |
|---|---|
| 1. Managing the coaching process | Setting goals are important to keep coachees accountable; goal setting focusses the intervention; coaches should summarise coaching sessions to allow reflection and referencing; coaches should encourage coachees to reflect and experiment with different thinking and behaving in between sessions; coachee must reflect on experiments in sessions. |
| 2. Using theory | Frameworks, theory and models shared by coaches helped coachees understand their new roles and themselves; psychometric assessments help create self-awareness. |
| 3. Consulting external parties | Support from line manager helps support the coachee; HR should keep an arms-length distance but may intervene if coaching results not evident; involving a mentor is beneficial; involving the coachee's team helps the team understand the coachee change process. |
| 4. Networking | Map the coachee's network; identify network improvements; expand coachee's network via formal and informal ways. |

would appear that using a mentor at the same time as being coached is not a standard practice, but for those who did have a mentor the effect was positive.

An interesting phenomenon that emerged from this research is where coaches C2 and C3 involved the newly promoted leader's team in the coaching process. For C2 this was almost out of frustration because the transformation that her client underwent was met with suspicion by her team. It was only after three facilitated sessions with the leader and her team that trust was restored to some extent. For C2 'there is no other way of coaching people who are being groomed for leadership' (C2, female, Coach) than to involve their teams at some point while for C3 involving the team was a way to bring in the systemic aspect of a senior corporate position.

### Networking

P1 and his coach spent some time analysing his network:

> we spent quite a bit of time to draw a picture of the people in my work life: who are the people that stress me out, who are the players, the actors in this great play at work. (P1, male, Transitioning leader)

C1 and C4 reported using a similar approach with their clients to help them build new relationships.

P3 expanded her network on a senior level, P5 spent time on his international network and P6 focussed on building networks outside of her regional office. All three participants found this exercise helpful in their new role. C1 advises her clients to build networks by meeting face-to-face either formally (using work as an excuse to introduce yourself) or informally (dropping in and introducing yourself as the new person).

### Ethical considerations

This research was approved by the ethics committee of the University of Stellenbosch. All participants signed informed consent forms where their confidentiality, anonymity and rights were explained.

## Discussion

The main aim of this research was to investigate how a coaching intervention should be designed to explicitly support leaders who are promoted into senior leadership positions. Two main themes emerged from the empirical data: aspects to take into account when initiating the coaching process and considerations when facilitating the coaching process itself. These findings provide practical suggestions for designing transition coaching interventions aimed at supporting leaders when they are appointed into senior leadership positions.

### Initiating the coaching process

The most prominent finding of this research is that transition coaching is not yet seen as a distinct coaching sub-discipline by organisations, despite the fact that the coaching fraternity considers transition coaching to be a specialisation of executive coaching (Witherspoon & Cannon, 2004). As a result coaching is not used explicitly and pre-emptively to assist leaders during their promotion into senior leadership positions. For the participants in this research, transition coaching was not part of the default leadership development tools used by their organisations. Organisations use a number of methods to train new leaders such as mentoring and coaching, 360-degree feedback, leadership training, job assignments, self–other agreement, use of self-narrative and life stories and action learning among others (Day, Fleenor, Atwater, Sturm & McKee, 2014; Fleenor, Smither, Atwater, Braddy & Sturm, 2010; Ligon, Hunter & Mumford, 2008). Some of these coaching is unique in that it is tailored to the individual and concentrates on behavioural change. Coaching puts into action the suggestion of change that other leadership development programmes profess (Kombarakaran et al., 2008).

There is a clear need for a more systematic approach to supporting new leaders that include both traditional leadership development programmes and personal coaching (Martin, 2015). This research confirms the notion that coaching at key career transition points, such as a promotion into a senior position, is a powerful mechanism to help ensure the incumbent's success (Simpson, 2010).

The findings of this research suggest that to avoid getting off to a wrong start, coaching should commence before the promotion (as soon as the announcement is official) to help the new senior leader design an action plan. There should then be regular (every 2–4 weeks) coaching sessions for the first 6 months, after which less frequent (every 2–3 months) sessions should occur for up to 3 years. These results differ from the notion that coaching for senior leaders should only start after the first 90 days (Sutton, 2008) and concurs that the results of the first 90 days in a senior position often set the tone for failure or success (Watkins, 2009).

The reason that transition coaching is not used more pervasively can to some extent be attributed to the high cost associated with the process. This was certainly the case for a number of participants in this research and is in line with other research findings that suggest that coaching is often lumped together with expensive interventions such as training programmes without considering the unique individual benefits that coaching brings (Simpson, 2010). On the other hand, if the high cost associated with an unsuccessful promotion to both the individual and the organisation is considered (Martin, 2015; Watkins, 2009), and the high likelihood of failure (Witherspoon & Cannon, 2004) perhaps the cost of a 3-year long coaching intervention as suggested above, is not as significant as is currently perceived.

An important part of initiating the coaching process is matching the coach and coachee. Both the new leader and the organisation's fit to the coach must be considered (Weinstock, 2011). The findings from this research suggest that the new leader must be given a choice of coaches to consider. This is

particularly important because not all coaches may be skilled in the specialisation of transition coaching and transition coaching is considered challenging for the coaching profession. New senior leaders are typically ambitious, intelligent, energetic and restless individuals, which implies that the coach must be able to cope with a wide range of issues and be able to move at a fast pace (Reynolds, 2011). A strong case can therefore be made to include a specific focus on transition coaching when training new coaches.

These research findings suggest that coaching sessions should ideally be conducted away from the office environment to create a space free from mental clutter. It is important however that pragmatism and flexibility be applied to customise the coaching progress to suit both coach and coachee. This is echoed by other research (Kaufman, 2006; Sammut, 2014).

## Managing the coaching process

Once the coaching process is underway, a number of key elements must be present to help guide the transition coaching process to success. The first such element as revealed by the findings, is the importance of managing the coaching process by setting goals, encouraging active experimentation in between coaching sessions and constant reflection.

Because of the inherently complex and unstructured nature of the new role and the challenges that senior leaders face (Peltier, 2010), it is crucial that goals are set to enable the incumbent to focus and to develop their current capacity (Grant, Passmore, Cavanagh & Parker, 2010). These goals enable the newly promoted leader, their team and line manager to identify critical issues that need addressing and to find alignment (Freeman, 2011, Witherspoon & Cannon, 2004). This research shows that goal setting during transition coaching is a crucial step and that these coaching goals must take into account the organisational needs (Gray, 2006; Kahn, 2014). This research also shows that setting transition coaching goals and sharing this with a wider audience help to keep coachees accountable not only to themselves, but to their team and line managers.

Reflection during and between coaching sessions and active experimentation between coaching sessions by the new leader appear to be important elements of a successful transition coaching intervention. New leaders often have incomplete, biased and irrelevant mental models when they take up the new position. They also often underestimate the complexity of the new role they take on, and this causes them to focus selectively on problems they feel comfortable to tackle (Freeman, 2011; Hill, 1992). The role of the transition coach is to help create awareness of these limiting assumptions through reflection (Reynolds, 2011) and encouraging active experimentation to refute strongly held notions of what is possible (Schön, 1991). The importance of reflection and active experimentation is echoed by the findings of this research whereby all the coaches interviewed

profess to use reflection and active experimentation in their transition coaching practice.

The findings suggest that the use of assessments and other theoretical frameworks were utilised frequently to provide a baseline and scaffolding within which the transition coaching was executed. Literature also suggests the use of assessments in transition coaching to determine coaching needs (Grant et al., 2010; Kaufman, 2006; Witherspoon & Cannon, 2004).

Involving third parties such as line managers and mentors emerged as an important contributing factor to transition coaching success. One use of this technique is for the coach to obtain feedback from others to help the new leader understand their limiting assumptions (Freeman, 2011). Mentors and line managers can also support the coaching agenda by being made aware of the coaching goals and to provide support and guidance during the coaching intervention. Findings from this research even suggest that the new leader's team should be involved in the process to enable an understanding of the change process and to provide a systemic angle to the coaching.

Finally, this research shows that the transition coach should help the new leader identify and build a strong network of people relevant to the new role. This finding is in line with other research that shows the importance of building a strong network (Clutterbuck & Megginson, 1999; Terblanche, 2014).

## Practical implications

A senior career transition is a uniquely challenging point in a leader's career with specific and well-known obstacles to overcome. The findings of this research suggest that the process of initiating and managing the transition coaching intervention could be specifically designed to address these known challenges. This gives impetus to the idea of recognising 'transition coaching' as a distinct coaching sub-discipline and for HR practitioners to take note of the potential benefit of such a tailor-made intervention.

HR practitioners should take note of the timing of initiating coaching (as soon as possible after the appointment is official), the frequency of coaching (one or two sessions before the role take-up, 6–10 during the first 6 months and thereafter one session every 2–3 months for up to 3 years). HR practitioners must also ensure that coach–coachee matching provides a number of options to the coachee, that clear coaching goals are set that consider the organisational goals and that transition coaches employ reflection and active experimentation in their coaching model. Line managers, peers and team members of the new leaders must also be involved in the coaching process through input (e.g. 360 assessments), mentoring and goal sharing.

## Limitations of the study

Although the participant selection included a diversity of perspectives which included new leaders who were coached,

transition coaches, HR practitioners and a line manager, diversity could have been increased by including the perspectives of the new leader's peers and subordinates.

## Conclusion

Literature indicates that there are significant challenges faced by newly promoted senior leaders. The cost of failure is high to both the individual and the organisation. Transition coaching has been shown to be a valuable support for leaders-in-transition. This research provides empirical evidence of the need for transition coaching and the lack of its use at present. Practical suggestions are made to assist HR practitioners and coaches to design coaching interventions specifically aimed at assisting transitioning leaders. These include:

- starting transition coaching as soon as the appointment is official
- continuing for at least 3 years with a session every 2–3 weeks for the first 6 months and a session every 2–3 months thereafter
- providing the coachee with a number of coach options
- allowing coaching to happen outside the office environment.

As part of the coaching process, the following aspects must be present:

- Clear coaching goals must be set which take into account the organisational needs.
- The coach's model must include reflection and active experimentation.
- Assessments and theoretical frameworks must be used during the coaching intervention to help create self-awareness.
- Mentors, line managers and the new leader's team must be involved in the coaching process.
- Building a new network must be an explicit part of the coaching process.

Coaching can provide effective support for leaders. If customised for career transition as suggested in this research, transition coaching may be able to provide a humane way to support ambitious, talented individuals with the significant challenges they face during promotions into senior leadership positions.

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### Competing interests

### Authors' contributions

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# Factors influencing managers' attitudes towards performance appraisal

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**Orientation:** Managers often have negative attitudes towards performance appraisal because of its problematic nature, which is influenced by political and social contextual factors. These negative attitudes lead to reduced employee support, inaccurate performance appraisal ratings and, consequently, negative employee perceptions of the performance appraisal process. This state of affairs necessitates a deeper understanding of the factors influencing managers' attitudes towards performance appraisal.

**Research purpose:** The purpose of this research was to gain a deeper understanding of the factors that influence managers' attitudes towards performance appraisal.

**Motivation for the study:** Previous research has confirmed the importance of performance appraisals in organisations. However, managers' dislike of and aversion to performance appraisal impact negatively on the effectiveness of performance appraisal systems and ultimately the development and performance of employees.

**Research design, approach and method:** An interpretivist qualitative study was adopted, utilising naïve sketches and in-depth interviews to collect data from eight managers, purposively selected. The data were analysed by using Tesch's descriptive data analysis technique.

**Main findings:** This study revealed that performance appraisal is fundamentally an uncomfortable and emotional process for managers, which results in their adopting defensive attitudes. Because of many uncertainties, managers do not always display the ability or readiness to conduct performance appraisals. The organisational context might place the individual manager in a position to distort employee ratings, which in turn negatively influences that manager's attitude.

**Practical and managerial implications:** This study provides insight into the present-day experience of managers in respect of performance appraisal and highlights the factors that influence their attitudes.

**Contribution:** The insight gained from this research into the factors impacting on the attitude of managers towards performance appraisals can assist organisations to better support and empower such managers to be more effective in their approach when conducting performance appraisals.

## Introduction

Performance appraisal has, for many years, been regarded as a critical process aimed at improving employee performance and, ultimately, organisational effectiveness (Cascio & Aguinis, 2011; Swanepoel, Botha & Mangonyane, 2014). Frustration with performance appraisal is more evident than ever, and voices opposing the use thereof are increasing and growing louder (Adler et al., 2016; Kondrasuk, 2012; MacDonald & Sulsky, 2009).

Performance appraisal is known to be a critical but complex component within performance management, and it holds many advantages (Cascio & Aguinis, 2011; Grote, 2011). Performance appraisal has been utilised by organisations as a tool through which strengths and developmental areas of employees can be described and to facilitate the relationship between the employee and the manager (Pichler, 2012). Performance appraisal is also used as a mechanism through which decisions relating to salary increases and succession planning are informed (Grote, 2011). However, performance appraisal is also associated with negativity and dissatisfaction among managers

(Cascio & Aguinis, 2011; Gordon & Stewart, 2009). Different views exist on this issue, but it seems that the challenges with performance appraisal emanate from the accuracy of employee performance ratings (Botha & Bussin, 2010; Shore & Strauss, 2008). Reasons for inaccurate performance ratings include among others:

- Distorted performance ratings as a result of managers' personal motives (Longenecker & Gioia, 2003).
- Managers' lack of commitment to performance appraisals (Tziner, Murphy & Cleveland, 2002).
- Managers fear performance appraisal as they experience it to be a challenge (Torrington, Hall, Taylor & Atkinson, 2009).
- Managers dread the possibility of damaging relationships with employees (Pulakos, 2011).
- Political motives embedded in longstanding relationships with employees (Shore & Strauss, 2008; Swanepoel et al., 2014).
- The organisational culture, norms, goals and manager attitude (Botha & Bussin, 2010).
- The presence of emotional uneasiness, conflict and failure to provide constructive feedback (Marreli, 2011).
- The fact that some managers perceive inaccuracies in performance ratings not as errors, but as enablers, which motivate and retain staff (Cascio & Aguinis, 2011).

It is therefore proposed that, by gaining a better understanding of the factors that influence the managers' experiences and attitudes – both positively and negatively – towards performance appraisal, organisations and managers may be enabled to conduct more effective and accurate performance appraisals and thereby enhance employee performance and development.

## Research purpose

Several studies previously explored factors that influence the attitude of managers towards performance appraisal (Botha & Bussin, 2010; Cascio & Aguinis, 2011). However, the work environment and context continuously change – as do the factors influencing managers' attitudes – resulting in managers approaching performance appraisal with a certain level of trepidation. Most recent studies have focused on employees' perceptions of the fairness of performance appraisal, consequently leaving a knowledge gap as to the factors impacting on managers' attitudes towards performance appraisal (Dusterhoff, Cunningham & MacGregor, 2014; Jacobs, Belschak & Den Hartog, 2014).

The prevailing attitudes of managers have a severe impact on the entire performance appraisal, including the accuracy of performance appraisal ratings (Botha & Bussin, 2010; Marmet, 2015). Managers viewing performance appraisal as positive tend to give more accurate ratings (Jawahar, 2001). Regrettably, there seems to be no consensus on an effective working solution to address manager attitudes and their impact of accurate performance appraisal ratings; consequently, displeasure with performance appraisal

persists (Gordon & Stewart, 2009; Swanepoel et al., 2014). In order to influence managers' attitudes towards performance appraisal more positively, this study was aimed at gaining a deeper understanding of the factors that influence managers' existing attitudes towards performance appraisal. The study proposes that by gaining a better understanding of the present-day factors that influence manager attitudes towards performance appraisal, more effective interventions can be developed that will result in not only a more positive experience on the part of managers, but that will also enhance employee development and performance.

# Literature review
## Performance appraisal

Performance management is an ongoing process where the performance of individuals and teams is identified, measured and developed through the process of performance appraisal (Aguinis, 2009; Cascio & Aguinis, 2011; Shore & Strauss, 2008). Performance appraisal can be defined as the collection of employee performance information based on observation and the evaluation of the employee's performance through an act of judgement (Cascio & Aguinis, 2011). Once an employee's current performance is measured, performance developmental areas are identified, strengths are reinforced and overall feedback is given to the employee (Aguinis, 2009; Swanepoel et al., 2014). As a manager's attitude can negatively or positively influence a performance appraisal, many researchers have, over the years, found this to be an interesting topic to study (Curtis, Harvey & Ravden, 2005; Jawahar, 2001; Longenecker, Sims & Gioia, 1987; Shore & Strauss, 2008; Thomas & Bretz, 1994). However, because of the attitude of the manager who conducts them, performance appraisals seem to remain a challenge to organisations.

## Attitude

What, then, is an attitude? Thurstone (1931) proposed that an attitude was something that relates to an individual's preferences towards an object. According to Allport (1935), an attitude points to a psychological type of readiness that is formed by applying a judgement towards an object through experience. Taking it one step further, Eagly and Chaiken (1993) define an attitude as a psychological tendency (an internal state) that is expressed by evaluating a particular entity with some degree of favour or disfavour. Attitudes therefore serve as functions to evaluate objects of thought, to process information, to adjust behaviour accordingly, to use as a protection mechanism and with which to display individual values (Fazio & Petty, 2008; Katz, 1960; Pratkanis, 2014).

Attitudes can form in various ways (Luthans, 2008; Miserandino, 2007; Vogel & Wänke, 2016; Zhang, Xie, Wee, Thumboo & Li, 2008). Firstly, through situations where a person's behaviour is not consistent with his or her attitudes towards the specific object. A negative attitude towards an object then forms to balance such inconsistency. Secondly, attitudes can form through learning, for example with

reinforcements such as positive encouragement. Another method requires the pairing of two stimuli until a situation is reached where the first stimulus transforms into a signal for the second stimulus. An attitude can be created where a neutral target stimulus (conditioned stimulus) is repeatedly paired with another stimulus (unconditioned stimulus) with either a positive or negative valence which can then, in turn, change the person's attitude in line with the direction of the unconditioned stimulus. Lastly, attitudes can form through the expectancy-value framework, a theory that assumes that the attitude towards the object is based on the sum of the values of all of the attributes that the attitude object is thought to have, and which is based on the mental formation of attitudes. This framework is a useful and popular model to explain how a collection of beliefs about objects forms attitudes. The expectancy-value framework attitude formation theory was adopted for this study (Zhang et al., 2008).

## Attitude and performance appraisal

In a study conducted by Longenecker et al. (1987), political motivation, the degree of trust in the relationship between employees and managers, and the need to avoid confrontation with difficult employees are proposed as elements, which impact on how a manager approaches and performs an appraisal and which subsequently influence the performance ratings that such a manager allocates to employees.

A few years later, Bretz and Milkovich (1992) conducted a study which aimed to investigate how performance appraisal was practised in the workplace. Their study reported a lack of manager ownership with managers feeling that they were excluded during the decision-making process and implementation of performance appraisal systems.

Similar studies exploring the factors impacting on managers' attitudes towards performance appraisals have examined the following:

- Managers' dislike towards the idea of influencing an employee's career (Thomas & Bretz, 1994).
- The manager's own level of motivation (Harris, 1994).
- The manager's view of the purpose of performance appraisal (Tziner, Lathan, Price & Haccoun, 1996).
- The manager's attitude towards the organisation (Tziner & Murphy, 1999).
- The manager's own personality preference as well as confidence in the performance appraisal system (Tziner et al., 2002).
- The employees' expectations (Curtis et al., 2005; Yun, Donahue, Dudley & McFarland, 2005).
- The manager's perception of the organisational context as well as affection towards the employee (Shore & Strauss, 2008).
- Performance appraisal skills and managers' motives (MacDonald & Sulsky, 2009).
- Conflicting roles, such as playing both a judge and a coach during performance appraisal (Aguinis, 2009).
- Terminology in performance appraisal that is confusing (Van De Mieroop & Vrolix, 2014).

Performance appraisal is a critical process and is viewed as one of the processes that have the greatest effect on the employee's career and development (Aguinis, 2009; Bayo-Moriones, Galdon-Sanchez & Martinez-de-Morentin, 2016; Grote, 2011). Therefore, in order to stay current and influence managers' attitudes positively towards performance appraisal, this study sought to gain a deeper understanding of the contemporary factors that influence managers' attitudes towards performance appraisal.

# Research design
## Research approach

This study adopted a qualitative research approach as it aimed at producing rich, nuanced and detailed data (Mason, 2012). Participants could share their personal performance appraisal experiences and, consequently, a complex and detailed understanding of the factors influencing these experiences was gained (Creswell, 2014; De Vos, Strydom, Schulze & Patel, 2012; Henning, Van Rensburg & Smit, 2012).

## Research strategy

In line with the interpretive paradigm, in-depth interviews were used to generate rich data as to participants' experiences, perceptions and feelings (Mason, 2012; Pietkiewicz & Smith, 2014). The in-depth interviews moved from being general in nature to being specific and were conducted in four phases, namely opening, questioning, probing and closing (Kolb, 2008). Two non-leading questions laid the foundation for the in-depth interview and were followed by follow-up questions and probes intended to build better, unrestricted understanding (Pietkiewicz & Smith, 2014). The two non-leading questions also provided direction for the naïve sketches. The managers responsible for performance appraisals in an organisation in the financial services sector were selected as the unit of analysis in this study.

# Research method
## Research setting

This research was conducted in the private sector at a medium-sized financial services organisation. The in-depth interviews were conducted with eight managers responsible for conducting performance appraisals on their subordinates and at a venue that was comfortable and private so as to prevent disturbances.

## Entrée and establishing researcher roles

Consent was obtained from the organisation's Executive Director of Human Capital to conduct the study. Background information and the aims of the study were discussed with potential candidates. Once the candidates agreed to participate, they completed an informed consent form outlining the scope of the study and how ethical and confidentiality issues would be attended to.

## Sampling

A purposive sample of eight participants was selected based on availability (De Vos et al., 2012; Durrheim & Painter, 2006) and aimed to represent managers from different ethnic groups (African, Indian and white), ages (30–70 years), genders (five female and three male) and the number of years' experience (from 1 to 35 years) in performance appraisal.

## Data collection methods

In-depth interviews were conducted with the eight managers in order to gain a deeper understanding of their experiences, interpretations and perceptions of performance appraisals (Mason, 2012). Two questions were asked of the participants: 'Tell me about your overall experience with performance appraisal' and 'What are the positive and negative factors that influenced your attitude towards performance appraisal?'

The secondary method of data collection was naïve sketches, which refer to a description of certain phenomena in the form of a short story (Giorgi, 1985). The naïve sketches were obtained through requesting each manager to draw a picture or write a narrative about their experiences with performance appraisal, highlighting the positive and negative factors that they believe have influenced their attitudes towards performance appraisal.

## Recording of data

Eight naïve sketches were collected. The in-depth interviews were recorded using an audio recorder and were transcribed verbatim. Field notes were taken during the interviews to capture the context as well as the researcher's observations, perceptions and experiences during these interviews (Greef, 2012). The data were stored securely and protected with passwords with only the researcher having access to them.

## Data analysis

The verbatim transcriptions of the recorded in-depth interviews and the naïve sketches were analysed in accordance with Tesch's descriptive analysis technique (Creswell, 2014). All transcriptions and narratives were read once to get a holistic sense of their content, after which ideas that came to mind were documented. Sub-themes were identified and grouped into major sub-themes, unique sub-themes and leftovers. This list of sub-themes was used to code the data. The most descriptive wording for each sub-theme was taken, converted into main themes and the data organised so that similar sub-themes were grouped. Interrelationships between the sub-themes were found and codes were generated. All of the data that were related to one main theme were highlighted in a certain colour and assembled together. Afterwards, the data were recorded to ensure that no sub-themes had been ignored.

## Strategies ensuring quality data and ethics

As required by an interpretative study, it was ensured that the researcher was skilled in using the self as an instrument to collect and analyse the data (Terre Blanche et al., 2006). The researcher kept field notes of her own personal experiences, biases, prejudices and orientations, which might have influenced the recording and interpretation of the information and regularly referred to and reflected on these notes to reduce possible bias (Creswell, 2014).

The researcher assessed the quality of the data and the rigour of the process to ensure that the generated findings would be credible, transferable, dependable and conformable (Schurink, Fouche & De Vos, 2012). Credibility was ensured through member checking (Creswell, 2014; Rossmann & Rallis, 2011). Triangulation was applied in utilising two data collection methods, namely in-depth interviews and naïve sketches, in order to enhance the credibility and trustworthiness of the study (Shah & Corley, 2006).

The transferability of the study was ensured through providing detailed descriptions of both the research methodology followed as well as the findings obtained (Babbie, 2010; Shah & Corley, 2006). Transferability was further enhanced by ensuring that all of the in-depth interviews were conducted and naïve sketches were collected within the same period so as to eliminate possible influences (Babbie, 2010). Dependability was ensured through being consistent in employing purposive sampling and applying the data collection and data analysis techniques (Shah & Corley, 2006). Confirmability was obtained through rigorous data management of the verbatim transcriptions, collected naïve sketches, field notes taken of observations during the in-depth interviews and accurate record-keeping (Rossman & Rallis, 2011; Shah & Corley, 2006).

## Reporting

The findings of the study were reported by utilising a qualitative, narrative reporting style (Visagie & Maritz, 2009). Themes and sub-themes are discussed and supported with evidence from the most descriptive verbatim quotations and findings are integrated with literature to explain the data and to indicate the relevance of the findings in relation to the current body of literature (Henning et al., 2012).

# Findings

This section portrays the overall findings obtained from the eight in-depth interviews and naïve sketches and presents the main themes and sub-themes as depicted in Table 1.

## Theme 1: The employee

The theme of employee-related factors yielded two sub-themes, namely employee behaviour and attitudes; and the role of employees in performance appraisal.

### Employee behaviour and attitudes

The participants all agree that performance appraisals are an emotionally loaded experience. Participant 3 particularly points to the unpredictable and varying nature of emotions a

**TABLE 1:** Grouping findings into main themes and sub-themes.

| Theme | Sub-themes | Properties |
|-------|-----------|-----------|
| Theme 1: The employee | Employee behaviour and attitudes | • Emotional employees<br>• Defensive employees<br>• Performance of employees |
|  | Role of the employee | • Employee ownership<br>• Inflated performance ratings<br>• Employee–manager relationship |
| Theme 2: The manager | Experience as a ratee and rater | • Limited experience and lack of exposure and guidance |
| Theme 3: Senior management | Senior managements role and directive | • Strategic<br>• Unethical frameworks |
| Theme 4: The performance appraisal | Uncertain purpose of performance appraisal | • Varying views |
|  | What is measured and how? | • What employee information?<br>• Objective vs. subjective |
|  | Frequency of performance appraisal | • Quarterly vs. annual |
|  | Type of feedback | • Positive vs. negative feedback<br>• Personality preferences |

manager is sometimes confronted with and 'as a manager, it is not a moment that you can enjoy … and it becomes very difficult' (Participant 3, male, African, 1 year of experience with performance appraisal).

The defensive attitude of employees certainly seems to be a factor impacting on the attitudes of managers towards performance appraisal. Participants 4 and 5 are of the opinion that employees acquire defensive attitudes prior to or during the performance appraisal feedback meeting and that managers dislike handling such defensive employees. Participant 6 agrees but had also experienced an employee who adopted such a defensive attitude as enjoying it: 'The particular person who was being appraised thoroughly enjoyed it. He enjoyed that sort of thing, but it wasn't a pleasant experience for the manager' (Participant 6, male, white, 35 years of experience with performance appraisal).

Most participants agree that conducting performance appraisals with employees who meet the required performance expectations is much less challenging than those with employees not meeting expectations. However, conducting a performance appraisal with an employee who did not meet the set performance expectations requires more effort and even an attitude adjustment on behalf of the manager. As Participant 4 explains: '… that difficult guy who is not a top performer is walking in there, you have to on a personal level set your attitude …' (Participant 4, female, white, 5 years of experience with performance appraisal).

**The role of employees**

The role employees fulfil during a performance appraisal and the manner in which they execute it seem to influence the attitude the manager concerned adopts during a performance appraisal. The first factor points to the ownership employees take with regard to their performance and the appraisal thereof. Both Participants 1 and 3 highlighted the importance of employees taking ownership of the performance appraisal process. Employees should be well informed as regards the performance appraisal process and be made aware that they are valued. When the employee feels valued and experiences a sense of

belonging, managers experience the performance appraisal process as more comfortable and less threatening.

The second factor relates to employees inflating their performance ratings. When managers have to rate employees lower on their actual performance in comparison with a higher employee self-rating, it becomes an unpleasant experience. Participants 4, 5 and 7 state that this is even more so the case when employees are unable to substantiate their own inflated self-ratings with sufficient evidence. Participant 6 agrees, personally experiencing such employees as being dishonest. Participant 4 further highlights how '… staff lives with the idyllic idea that they are much better performers than what they actually are … even constant feedback and critic are disregarded and set aside' (Participant 4, female, white, 11 years of experience with performance appraisal), and this disregard for feedback from the managers further impacts negatively on the attitude of the manager.

The third factor relates to the strength of the employee–manager relationship and its foundational characteristics such as open communication and trust. Participant 2 highlights the importance of continuous, open communication as 'communication is very important and with the workload we're sitting with it is not always possible to communicate with your staff all the time and that is an influence …'; however, regular communication seems to be important so as 'to ensure that there is a good understanding of what is expected' (Participant 2, female, white, 5 years of experience with performance appraisal). Participant 6 points to the importance of a relationship of trust between the employee and manager and to how this simplifies the performance appraisal. In order to establish this trust relationship, Participant 3 feels it is important to strike a balance between being the manager and getting the task done against building a relationship with the employee.

## Theme 2: The manager

Another prominent theme emerging from the data relates specifically to the manager. The sub-theme which emerged is concerned with the manager's previous experience gained in both the role of ratee (the employee whose performance is appraised) and rater (the manager who conducts a performance appraisal with an employee).

**Experience as ratee and rater**

As ratees, managers highlight how they mostly received positive performance feedback from their managers and therefore have gained limited experience and exposure as to how a performance appraisal containing negative feedback should be handled. Like most other participants, Participant 2 voices this as follows: 'I've never been in a situation where I could see how the other person handles a negative appraisal' (Participant 2, female, white, 5 years of experience with performance appraisal).

This lack of exposure seems to impact negatively on a manager's own readiness and ability to deal with negative

performance appraisals in his or her role as rater. According to Participants 2 and 5, having had limited previous experience, exposure or guidelines on how to conduct a performance appraisal as a rater meant that a performance appraisal that contained negative performance feedback was an unpleasant experience for them. Participant 2, however, points to how 'you get used to it and get to learn it. Obviously as you get to learn to deal with people, it becomes easier' (Participant 2, Female, white, 5 years of experience with performance appraisal). Participant 1, a more experienced manager, seems to sympathise with new managers who have to deal with this uncertainty and points to the importance and value of guidance and mentoring.

## Theme 3: Senior management

The influence of senior management emerged as a third theme from the data. This theme incorporates the sub-themes of the role of senior management and their subsequent directives as contained through frameworks in accordance with which performance appraisals are managed.

### Senior management's role and directive

Participants are of the opinion that senior managers play a strategic role in ensuring the effectiveness of performance appraisal and that it should be implemented following a top-down approach. Participant 1 believes that 'when performance appraisal is driven and led by senior management, it works for the company' (Participant 1, Male, Indian, 15 years of experience with performance appraisal).

In this role, senior management also directs managers through frameworks on how they should conduct the performance appraisal. A substantial number of the managers were of the opinion that these frameworks have a significant influence on the attitudes of managers towards performance appraisals.

These frameworks might require the manager to inflate or deflate the employees' performance ratings. Participant 2 shares an experience where 'you are told that you have to make sure that your appraisal falls within the scale, which then makes it difficult for me to manage' (Participant 2, female, white, 5 years of experience with performance appraisal). Participant 4 had a similar experience and elaborates:

> it is difficult because that influence your attitude towards the process. Is it really fair? And you are the one who has to sit with that employee and there is nothing worst. And I mean you don't want to lie to that staff member who sits in front of you, because that is not your purpose that's not what you are there for. That makes it a yucky process and a difficult process and it starts making it in an emotional process. (Participant 4, female, white, 11 years of experience with performance appraisal)

Subsequently, managers seem to struggle with the execution of frameworks they believe to be unethical, and this affects them emotionally, resulting in negative attitudes towards performance appraisals.

## Theme 4: The performance appraisal

Theme four is the most prominent theme that emerged from the data and relates more specifically to the performance appraisal itself. Four sub-themes emerged and these incorporate the clear purpose of the performance appraisal; problems relating to what is measured and how it is measured; the frequency of the performance appraisal; and the type of performance feedback.

### Uncertain purpose of performance appraisal

Participants highlight the importance of a performance appraisal having a clear purpose. Even though they are all employed in the same organisation, they all seem to have different views on exactly what the purpose of performance appraisal in their organisation is. Participant 1 views a performance appraisal as 'a tool to get to a result in a very objective way' and emphasises the importance of reinforcing the objectives 'as often as performance appraisals are conducted' (Participant 1, male, Indian, 15 years of experience with performance appraisal).

According to Participant 6, performance appraisal is merely an administrative tool used by organisations to calculate salary increases. Participant 8, on the other hand, views the purpose of performance appraisal differently and believes it has a positive element to it and can be used:

> as a management tool … to see where your staff is currently, what factors can help them to do their job better, faster more accurate and to get them there. (Participant 8, female, white, 4 years of experience with performance appraisal)

### What is measured and how?

The second sub-theme that emerged from the data pertains to what a performance appraisal should measure and how. Most participants revealed their uncertainty as to what employee information they should use during a performance appraisal and how they should utilise this information in allocating ratings. According to Participant 1 there are:

> two parts to the appraisal. One is factual … how you deliver, are you punctual on delivery times. Then there is the second part which is airy fairy … and you know when something is not clear and to the point it leads to a lot of debate unnecessary. (Participant 1, male, Indian, 15 years of experience with performance appraisal)

Participant 4 agrees, stating:

> I believe in factual and statistical information and as long as you have that, it cannot be left questioned, open for interpretation and it cannot be left open for a personal attack. (Participant 4, female, white, 11 years of experience with performance appraisal)

Participants indicate a clear preference to use objective or factual information and state clearly how they find it challenging to rate employees on subjective data because such ratings are open to interpretation and may create conflict situations between the manager and employee.

**Frequency of performance appraisals**

The frequency with which performance appraisals are conducted is another factor that impacts on the attitude of managers. Performance appraisals conducted only annually seem to be experienced by Participant 8 as excessively time consuming because of the large amount of information that has to be dealt with. All participants agree with Participant 8 and expressed a strong preference for rather conducting performance appraisals more frequently as they believe that this would enhance objectivity and fairness, assist employees to achieve their goals more successfully and also make the process less emotional.

**Type of feedback**

Participants shared their preference for performance appraisals in which they give positive feedback and where their final rating is equal or higher than that of the employees' self-rating, as this results in performance appraisal being a rewarding experience. On the other hand, having to give employees feedback that is regarded as negative because of the manager's score being lower than the employees' self-rating is experienced by the participants as unpleasant and quite emotional. Participants 6 and 7 clearly indicated their preference for shying away from giving negative feedback. Participant 6 prefers to rather 'grade people up' as it is less unpleasant (Participant 6, male, white, 35 years of experience with performance appraisal). Contrary to the above participants, Participant 8 feels that negative feedback is expected and mostly required as 'you don't have time to give positive feedback. You always have time to give negative feedback because you have to' (Participant 8, female, white, 4 years of experience with performance appraisal).

Participant 2 points to the influence of the manager's personality and how it impacts on his or her attitude towards performance appraisals. According to Participant 2, handling performance appraisals effectively is a skill and ability that needs to be developed 'where you need to learn to cut off and handle it professionally' (Participant 2, female, white, 5 years of experience with performance appraisal). Participant 2 further proposes:

> negative feedback must be given through as positive criticism … my personal challenge with this is that we have varied types of personalities and different personalities accept positive criticism in different ways. (Participant 2, Female, white, 5 years of experience with performance appraisal)

# Discussion

## Outline of the findings

The aim of this research was to gain a deeper understanding of the factors that influence managers' attitudes towards performance appraisal. Performance appraisal is generally experienced as a negative process (Cascio & Aguinis, 2011; Gordon & Stewart, 2009). As managers are fundamental to the process of performance appraisal it is important to explore and better understand the factors that impact negatively on their attitudes towards performance appraisal.

Being able to positively influence managers' experience of and subsequent attitudes towards performance appraisal should result in more accurate performance ratings as well as in improving the support provided to employees by managers (Botha & Bussin, 2010).

The findings of this study re-emphasised the influence emotional and defensive employees have on the attitude of managers towards performance appraisals (Aguinis, 2009; Thomas & Bretz, 1994). Employees who become emotional when they receive negative performance feedback and subsequently behave in a hostile and/or defensive manner impact negatively on the attitudes of managers towards performance appraisals.

The findings further point to the importance of managers and employees taking ownership of the performance appraisal process. Lack of ownership is a result of managers and employees feeling that they have not been consulted during the design phase of the performance appraisal process and thus do not own it. Based on the above findings it can be concluded that managers should be well trained on both the process to be followed and that they should receive coaching and guidance on how to conduct feedback (positive and negative) as this will empower them and improve the experience and quality of performance appraisal (Hii & Ahmad, 2015).

From the findings it is evident that managers have favourable attitudes towards performance appraisal when the performance of the ratee complies with the expected performance and when the employee's self-appraisal ratings are similar to the ratings assigned by the managers. Botha and Bussin (2010) agree as ratings are based on an employee's or manager's subjective view of the performance and, consequently, such ratings might be inflated, thus resulting in the appraisal being experienced as uncomfortable. The findings furthermore indicate that the relationship between the manager and the employee influences the manager's attitude. The importance of a healthy relationship built on continuous communication between employee and manager is acknowledged (Pulakos & O'Leary, 2011). However, during a performance appraisal the value of such a relationship is often not visible, especially when the relationship has been long standing. Studies indicate that managers often choose to inflate or deflate performance ratings as they are fearful of harming the employee–manager relationship (Aguinis, 2009; Shore & Strauss, 2008).

The findings furthermore show that a manager's previous experience, in both the capacity of ratee and rater, influences his or her attitude towards future performance appraisals. As ratees, managers' attitudes towards performance appraisal are influenced by their past experiences. These past experiences make them more familiar with the organisational processes and procedure and remind them of how they experienced receiving feedback, both positive and negative (Aguinis, 2009; Greguras, 2005). Consequently, managers

who had favourable performance appraisal experiences in the past hold favourable attitudes towards this process, and managers who had unpleasant previous performance appraisals dislike giving negative feedback to their employees (Aguinis, 2009).

From the findings it is evident that the role senior management plays in performance appraisal influences managers' attitudes towards performance appraisal. The participants expressed their view that senior managers should be the drivers of the performance appraisal system and that it should be executed from the top downwards, emphasising the importance and value of the process to the organisation as a whole (Kondrasuk, 2012).

The findings furthermore stressed the ability of the performance appraisal framework to pose an ethical dilemma to managers. In a study conducted by Tziner et al. (2002), it is proposed that managers who perceive it to be acceptable to distort performance ratings would shy away from making conscious decisions to misrepresent performance ratings either in order to reach their own personal goals or to achieve the goals of the organisation. Shore and Strauss (2008) agree proclaiming that such frameworks originate from the organisational context and can instigate unethical behaviour on the part of the manager.

Evidence suggests an uncertainty between some managers as to the purpose of performance appraisal. This assertion is warranted as managers are not always clear on whether the performance appraisal is being used for administrative purposes (such as reward-related) or for the development of employees. Not being clear on the purpose of performance appraisal seems to be a prevalent complication within the sphere of performance appraisal and most certainly impacts negatively on attitudes, employee development and both employee and organisational performance as not everyone is steering in the same direction (Curtis et al., 2005; Kondrasuk, 2012; Marmet, 2015).

Similar to the challenges experienced pertaining to the purpose of the performance appraisal are challenges around uncertainty as to what should be measured. Managers are often challenged with measuring employees' tasks that are not properly defined, and this state of affairs results in uncertainty (Kondrasuk, 2012). In some positions it is straightforward and trouble-free to determine whether the person is performing, but other positions might be complex and time and effort might be required to assess whether the person is delivering according to expectations (Lawler, Benson & McDermott, 2012). Jawahar (2001) claims that managers with positive attitudes towards performance appraisal will ensure that employees receive accurate performance appraisal ratings.

The findings indicate that the frequency of performance appraisal will affect managers' attitudes towards performance appraisal. It is also confirmed that the frequency or timing of performance appraisal is a problematic area for managers

and this is one of the reasons why performance appraisal is viewed negatively (Kondrasuk, 2012).

According to the findings, managers seem to agree on the impact the type of feedback they need to give – in conjunction with their personalities – has on their overall attitude to performance appraisal. According to Marmet (2015), the rater's personality interacts with the context in which the appraisal occurs. Therefore, the type of feedback that needs to be given affects the manager's attitude and emotions and subsequently influences the rating (Belschak & Den Hartog, 2009). Furthermore, managers dislike giving negative feedback to employees as such negative feedback affects the employee's career, causes defensive reactions and even promotes employee hostility (Thomas & Bretz, 1994).

## Practical implications

Although this research was conducted at a medium-sized financial services organisation in the private sector, the factors identified as influencing managers' attitudes towards performance appraisal have practical implications for any organisation that implements performance appraisals as part of its human resource management practices. The insight gained from this research can assist organisations to better support and empower managers to be more effective in their approach when conducting performance appraisals.

Performance appraisal appears to be a process during which both the manager and the employee feel uncomfortable, defensive and sometimes even emotional. Managers therefore tend to avoid employees with defensive and hostile attitudes and behaviour. It is recommended that organisations make use of multi-source appraisals to minimise emotional behaviour during performance appraisal. Organisations should however ensure that all raters have been sufficiently trained and that just in case an employee wishes to appeal against a rating, which process the raters should now follow.

However, if attention is not given to this state of affairs, the situation is exacerbated when managers experience uncertainties regarding the technical aspects of performance appraisal, such as the purpose of performance appraisal, timing and frequency of performance appraisal and what should be measured. It is recommended that managers should receive training regarding the technical aspects of performance appraisal.

Because of a lack of training, managers do not always have the ability and readiness to conduct performance appraisals, specifically when such performance appraisals will contain negative performance feedback. Managers draw from their experiences with performance appraisal as both ratee and rater and they need to be facilitated and trained in conducting performance appraisals, specifically performance appraisals containing negative feedback.

Furthermore, the organisational context might place managers in an undesirable position that leads them to

distort employee performance ratings – unintentionally or deliberately. Senior management needs to drive performance appraisal and ensure that employees and management understand the purpose of performance appraisal and that they all work with the same goals in mind. Senior management also needs to cultivate a culture of ethical performance appraisal in which managers are held accountable for the performance ratings they assign to employees.

## Limitations and recommendations

Although this study was successful in identifying the factors that influence manager attitudes towards performance appraisal, it had some limitations. Firstly, the findings of this study are representative participants employed in a medium-sized financial services organisation in the private sector and thus not representative of organisational contexts within other sectors. Secondly, a deeper understanding of the participants' previous employers and the performance appraisal systems they had been subject to could have provided a more in-depth view of their attitudes towards performance appraisal as well as the factors that influence these attitudes.

The findings of this study revealed the opinions and views of this sample of managers only. Therefore, in future research, the sample could include participants from different organisations and business sectors to ensure better representation. It is furthermore recommended for future research to also include the views of employees and senior management as to the factors that influence managers' attitudes towards performance appraisal.

## Conclusion

It is crucial for organisations to be aware of factors that influence managers' attitudes towards performance appraisal. By taking cognisance of this fact, organisations might be better positioned to change managers' attitudes towards performance appraisal positively. From the findings of this study as well as from the literature it seems that an interrelationship exists between the defensive and emotional nature of performance appraisal, the technical uncertainties among managers, the readiness of managers to conduct performance appraisals and the organisational context and framework in which performance appraisal is conducted.

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## Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

## Authors' contributions

T.d.P. was the project leader. T.d.P. and A.v.N. were co-responsible for the experimental and project design. T.d.P. collected and analysed the data. A.v.N. performed the quality assuring of the data collection and data analysis process. T.d.P. and A.v.N. co-wrote the manuscript.

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# Expatriate mentoring: The case of a multinational corporation in Abu Dhabi

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**Orientation:** Despite numerous studies on the adjustment challenges faced by expatriates, not much emphasis has been placed on mentoring and what mentoring plans should entail. This also pertains to research on expatriate mentoring in the United Arab Emirates (UAE), which has experienced massive economic growth and an influx of expatriates from across the globe.

**Research purpose:** The main purpose of the study was to propose guidelines to a multinational corporation in Abu Dhabi on compiling an expatriate mentoring plan.

**Motivation for the study:** The prevalence of expatriate assignments to the UAE and the fact that multinational companies report high failure rates served as the motivation for the study.

**Research approach/design and method:** A mixed-method approach was followed, and a case study design was applied. A structured questionnaire was administered to 391 expatriate employees, after which principles for expatriate mentoring were formulated and presented to a focus group for discussion.

**Main findings:** The findings show that expatriates faced challenges regarding work-related and personal-level adaptations, which emphasise the need for an expatriate mentoring plan.

**Practical/managerial implications:** Principles for expatriate mentoring emanated from this study, namely structured interaction, clear objectives, target dates, regular reflection on challenges, formal evaluation and remedial action. These principles informed a proposed expatriate mentoring plan.

**Contribution/value-add:** The study contributes both theoretically and empirically to the compilation of an expatriate mentoring plan.

## Introduction

Owing to the pervasive impact of globalisation, the contemporary business environment is highly competitive, and organisations need to employ the best talent to outperform the competition. In this regard, the United Arab Emirates (UAE) has, because of enormous economic growth in the last decade and a deficit in local talent, embarked on the recruitment of large numbers of expatriate employees (AlMazrouei & Pech, 2015). According to Bashir (2012), more than 91% of the UAE's workforce consists of expatriates. Because of the influx of expatriates into the UAE, a hybrid-type culture has developed: On the one hand, Islamic traditional values prevail; on the other hand, expatriates with their cultural diversity from many different nationalities are tolerated. Moreover, the UAE has successfully combined Western management principles with traditional values and practices, for example, paternalistic leadership and customs regarding female dress code and time management, which is unique to the Arab world.

Companies that operate within this sphere are likely to experience an array of cross-cultural and other challenges such as work performance and retention (AlMazrouei & Pech, 2015; Bock & Schulze, 2016). In addition, multinational corporations (MNCs) are confronted with high failure rates of expatriate assignments, which include poor performance, premature termination and expatriates who are unprepared or ill-adjusted to the new setting. These challenges are not restricted to the UAE. It is estimated that there are around 889 146 MNCs worldwide that employ large numbers of expatriates (UNCTAD, 2017). According to Hansen and Rasmussen (2016), about 40% of expatriates are not adequately prepared for international assignments. In a 2013 survey, Maurer found that 42% of expatriate assignments were unsuccessful, while Purgal-Popiela (2011) states that one out of three expatriates performs below expectation. Pokharel (2016) reports that 7% of MNCs in the United States experience a 40% expatriate failure rate; 69% a 20% failure rate; and the remaining 24% a 10% failure rate.

Despite numerous studies on the adjustment challenges faced by expatriates (see Caligiuri & Bonache, 2016; Haslberger, Brewster, & Hippler, 2013; Lee & Kartika, 2014; Okpara, 2016; Sonesh & DeNisi, 2016), there is a dearth of research on expatriate mentoring plans and the issues mentoring plans should address. Although formal training (e.g. pre-departure, post-arrival or cross-cultural training) has been a dominant strategy in preparing expatriates, expatriate mentoring per se has received little attention (Abdullah & Jin, 2015), and very few MNCs have expatriate mentoring plans in place (Cullen & Parboteeah, 2010; Sullivan, 2015). This is also the case with the corporation selected for this study: a large MNC in the oil and gas industry in Abu Dhabi that employs around 7150 expatriates.

## Purpose

The main purpose of the study was to propose guidelines for the compilation of an expatriate mentoring plan to assist expatriates and their families with adjusting to living and working in the UAE.

## Literature review

### The globalised world of work

Globalisation is not a new phenomenon; what is unprecedented is the accelerated speed at which information and knowledge are shared, mainly because of the Internet and information communication technology, as well as the proliferation of international trade and investment (Austin, Chapman, Farah, Wilson, & Ridge, 2014). Globalisation has its roots in history, and humans have travelled and traded since early times. From the 16th to the 19th century, European powers expanded aggressively and colonised many parts of the world, notably Africa and Asia (Luthans & Farner, 2002). The Dutch East India Company (known in the Netherlands as the *Vereenigde Oost-Indische Compagnie* or *VOC*) was established in 1602 and is considered to be the world's first international company.

This, together with the Industrial Revolution (which commenced from about 1760 in Great Britain), has paved the way for the globalised world of the 21st century. The Industrial Revolution, gave rise to machines being used in production, chemical manufacturing, iron production and the like. The revolution soon spread to all major European and North American centres, essentially conquering international markets. Between the 18th and 19th century, the need for raw material, and the subsequent Second Industrial Revolution, led many industrialised countries to colonise less developed regions and countries. These developments initiated the rise of MNCs (Arezki, Rota-Graziosi, & Senbet 2013).

The two World Wars of the 20th century and the opposing ideologies of socialism (advocated by the USSR) and capitalism (advocated by the United States and Europe) brought about a great deal of contention on how economic activities should be structured. After the Second World War,

the global market experienced accelerated growth and development as Europe recovered from the ravages of war. This also involved the liberalisation of international trade, which had been gaining momentum since 1989 following the collapse of socialism (Arezki et al., 2013). Since then, MNCs have become gigantic in scale, influencing political, economic and social development throughout the world (Okpara, 2016).

In the context of increased globalisation, organisations face distinct challenges. The most prominent of these challenges occur on a technological level, where increased digitalisation and virtualisation of the workplace are evident. Further challenges pertain to the increase in diversity and the continuous attempt to attract and retain the right calibre of talent (Deloitte, 2017).

### Expatriates and the complexity of adjustment

In 2010 Noe already noted that the exodus of highly skilled individuals was becoming a dominant part of international migration. This tendency has persisted unabated, hence the prevalence of expatriate assignments worldwide. An 'expatriate' could be described as an individual working and residing in a country other than their native country. There are many terms referring to the types of migration occurring across international borders. 'Immigrants', for example, include individuals who live permanently in a foreign country; 'short- and long-term expatriate assignees' are nominated employees deployed internationally; 'international commuters' are employees who work in a foreign country, but return home regularly; 'self-initiated foreign workers' are individuals who undertake international work with no, or very little, organisational sponsorship; and employees undertaking extensive business trips (Point & Dickmann, 2012).

Numerous studies have focused on the adjustment issues of expatriates. According to Haslberger et al. (2013), adjustment should be viewed in terms of obtaining person–environment fit, and cognition, emotion and behaviour should be considered as part of the process. Ren, Yunlu, Shaffer, and Fodchuk (2015) found that expatriates who are not adequately instructed about cultural issues could develop feelings of job deprivation. This critical finding supports the importance of cross-cultural adjustment mentioned by Okpara (2016). Cross-cultural adjustment is the key element of expatriate success, as individuals need to feel secure and comfortable in their new environment. Another important element is the level of adjustment of family members to the new setting (Lee & Kartika, 2014).

In their study on the work–family interfaces of expatriation, Schütter and Boerner (2013) found four potential antecedents for the success of expatriate assignments: social support at work, developmental opportunities at work, family social support and family adjustment. Thus, it is clear that host nationals should support newcomers with regard to both work-related and personal-level adjustment.

Unfortunately, as Sonesh and DeNisi (2016) note that the relationship between host nationals and expatriates is often problematic, this is a big obstacle to adjustment progress. A study by Bock and Schulze (2016) on cross-cultural mentoring in UAE schools found that cultural, religious and language barriers posed significant challenges in the mentoring process, especially for the Arab world.

The adjustment challenges of expatriates could be explained by the Identity Development Theory of Chickering and Reisser (1993). Although it initially focused on the psychological development and adaptation of college students, this theory can also be applied to the adjustment of expatriates. The theory proposes seven stages that individuals go through in order to adapt to a new environment:

- *Developing competence* involves the development of intellectual, physical and interpersonal relations which enable an individual to function in a new environment. This stage also relates to attaining cultural intelligence and the ability to work with individuals from diverse cultural groups.
- *Emotion management* relates to dealing constructively with emotions such as anxiety, anger, depression, shame, guilt, etc. Knowing and becoming aware of these emotions are essential, as well as constructing ways in which they can be managed.
- *Moving through autonomy towards independence* pertains to the development of independence in the new environment by being able to function autonomously. This also involves attaining emotional independence and the ability to live according to own convictions.
- *Developing mature interpersonal relationships* relates to the development of awareness and understanding of different ideas, backgrounds and values. Mature interpersonal relationships imply that individuals have tolerance and appreciation (both interculturally and interpersonally) for innate human differences, as well as a capacity for intimacy.
- *Establishing identity* refers to the maturity of individuals. This implies that they know themselves and accept themselves as unique individuals. This notion is supported by the concept of 'emotional intelligence', which means that individuals know and understand themselves and are able to manage their emotions and interactions with others.
- *Developing purpose* is attained once individuals have a reliable sense of self and are able and willing to reach their full potential. This notion also relates to the concept of 'self-actualisation' promoted by Abraham Maslow.
- *Developing integrity* refers to individuals' rebalancing their personal values to create a match between their own value system and expectations from the new environment. This involves self-respect and respecting others.

**Supporting expatriate adjustment through mentoring**

From an MNC's perspective, the degree of adjustment of the expatriate is an important predictor of employee performance. From an expatriate's perspective, adjustment is a determining factor of job satisfaction and psychological well-being. The following individual and organisational elements were found to be crucial in expatriates' ability to adjust to their new environment:

- Individual elements that influence an expatriate's ability to adjust involve mostly personal characteristics such as flexibility, a desire to adjust, interpersonal skills, self-confidence, cultural understanding, emotional stability, previous overseas experience, ability to speak the local language and the ability of family members to adjust to the new environment (Awais Bhatti, Mohamed Battour, Rageh Ismail, & Pandiyan Sundram, 2014; Caligiuri & Bonache, 2016).
- Organisational elements that influence an expatriate's ability to adjust include pre-departure preparation, the recruitment and selection practices used by the company, and organisational support (AlMazrouei & Pech, 2015).

Relocation and working in a new environment are multifaceted and complex processes, and expatriates and their families require the assistance of host organisations to succeed. The importance of assisting family members is emphasised by Zhu, Luthans, Chew and Li (2006), who found that up to 85% of expatriate assignments fail because of family dissatisfaction in the new environment.

Mentoring, and specifically having a mentoring plan in place, can be a strategy to provide the necessary support to expatriates and their families. The notion of a mentoring relationship originates from Homer's epic poem, *The Odyssey*. The story tells of Odysseus, the king of Ithaca, who, while taking part in the Trojan War, entrusted his son to his friend, Mentor, who was to educate the young prince. The term 'mentor' has since been used to refer to a person with broad and profound knowledge who is able to teach and guide the inexperienced (Zhuanga, Wu, & Wen, 2013).

For the purposes of the study, a 'mentor' is a competent individual who provides guidance, advice and continuous support to assist the mentee (the expatriate) in making the necessary adaptations to the new environment (Armstrong, 2010). The mentor needs to guide and support the mentee on a personal-level (i.e. living in a new environment, finding a place to stay, settling in of family members, etc.) and an organisational level (i.e. doing the job and adapting to a foreign work environment) (Werner & DeSimone, 2012). In their study, Zhuanga et al. (2013) found that the psychological support, role modelling and career development functions provided by mentors were positively related to the general adjustment of mentees, including better interaction with co-workers and job-related aspects. Although authors such as Cullen and Parboteeah (2010) and Zhuanga et al. (2013) propose mentoring as a strategy, there is a dearth of research on the issues to be addressed in expatriate mentoring plans.

As alluded to above, the UAE is a country deeply rooted in traditional Islamic practices. However, for continued economic growth, they have made trade-offs and allowed

expatriates from different nationalities and religions to join their labour force. This has led to the development of a hybrid-type culture in which Western values and beliefs are accommodated. This is especially pertinent in larger centres and cities such as Abu Dhabi and Dubai. The company investigated in this study operates in the oil and gas sector in Abu Dhabi – a sector which has been instrumental in ensuring the rapid growth of the UAE economy.

Around 10% of the world's total oil and gas reserves are situated in the UAE, and it is projected that this sector will continue to grow in the coming decades. To date, the biggest deposits of oil have been found in Abu Dhabi compared with other UAE regions. More than 85% of the total UAE oil capacity and 90% of total UAE reserves are controlled by the company in this study. The company employs around 7150 expatriates from over 70 different nationalities.

# Research design

## Method

### Research approach

A mixed-method approach was followed in the study, which involved both a quantitative and qualitative phase. In the quantitative phase a structured questionnaire was administered, and in the qualitative phase one focus group discussion was held. The mixed-method approach was deemed applicable, as the adjustment levels of a large population of expatriate employees had to be established. The focus group discussion on the principles of expatriate mentoring provided additional insight into the complexities of expatriate adjustment and informed the proposed expatriate mentoring plan.

### Measures

For the quantitative part of the study, the following measures applied: Owing to the complex adjustments expatriates need to make, only individuals with tenure of two or more years were included in the data gathering process. Expatriates with longer tenure were deemed better able to reflect on their experiences. The human resource department of the company provided information pertaining to the departments and positions of expatriate employees. This enabled the researchers to send all respondents a link to the questionnaire via Survey Monkey. Participation was voluntary, and respondents were ensured that responses would be treated confidentially.

For the qualitative phase, the following measures applied: Participants had to have tenure of more than 2 years; they must not have participated in the quantitative part of the study; they were selected from all six departments of the company (administration, safety, operations, maintenance, projects and human resource management); and they were from different nationalities.

### Participants

For the quantitative part of the study, a structured questionnaire was administered to 391 expatriate employees.

According to Israel (2003), for any population between 7000 and 8000, a sample size of 378 is sufficient. The sample of 391 could thus be regarded as sufficient. Simple random sampling was applied to select participants. Simple random sampling, also known as chance sampling, means that all items in the population have an equal chance of inclusion in the sample. The sample included employees from all six departments in the company.

For the qualitative part of the study, nine expatriate employees were initially invited to participate in one focus group discussion, but only six were available on the day of the discussion. These individuals were from different nationalities (United Kingdom, India, Philippines, New Zealand, Romania and South Africa), they had not participated in the quantitative study and they represented the six departments of the company. As qualitative research is less structured and formal, participants were selected based on their availability and willingness to participate in the focus group.

### Measuring instrument

As indicated above, the Identity Development Theory of Chickering and Reisser (1993) served as a conceptual guide for the development of the structured questionnaire. This theory provides a valuable basis from which to study adjustment challenges as illustrated by previous research (see Coe-Meade, 2015; Moreau, 2017). The questionnaire was further informed by the research of Awais Bhatti et al. (2014) and Caligiuri and Bonache (2016) on the individual elements of expatriate adjustment and that of AlMazrouei and Pech (2015) on the organisational elements.

The questionnaire consisted of three sections: Section A captured demographics (nationality, gender, age, employment level and tenure), Section B captured work-related adjustment challenges, and Section C captured personal-level adjustment challenges. The questionnaire was piloted on 26 January 2017 using five expatriate employees from the human resource management, safety and operations departments. All the respondents included in the pilot study had more than 2 years of service and were from different nationalities (Arabic, British, Jordanian, South African and Indian). The respondents indicated that they understood the questionnaire and that the questionnaire was neither ambiguous nor difficult to understand.

Once the data were analysed using both descriptive and inferential statistics, the researchers were able to ascertain the challenges expatriates and their families were facing. The results from the quantitative study supported the need for an expatriate mentoring plan. Subsequently, principles were formulated and presented to the focus group for in-depth discussion and feedback. The focus group discussion was conducted for 2 hours on 17 June 2017. As the participants did not want their responses to be electronically recorded, a research assistant took detailed notes while the main researcher facilitated the discussion. The research assistant
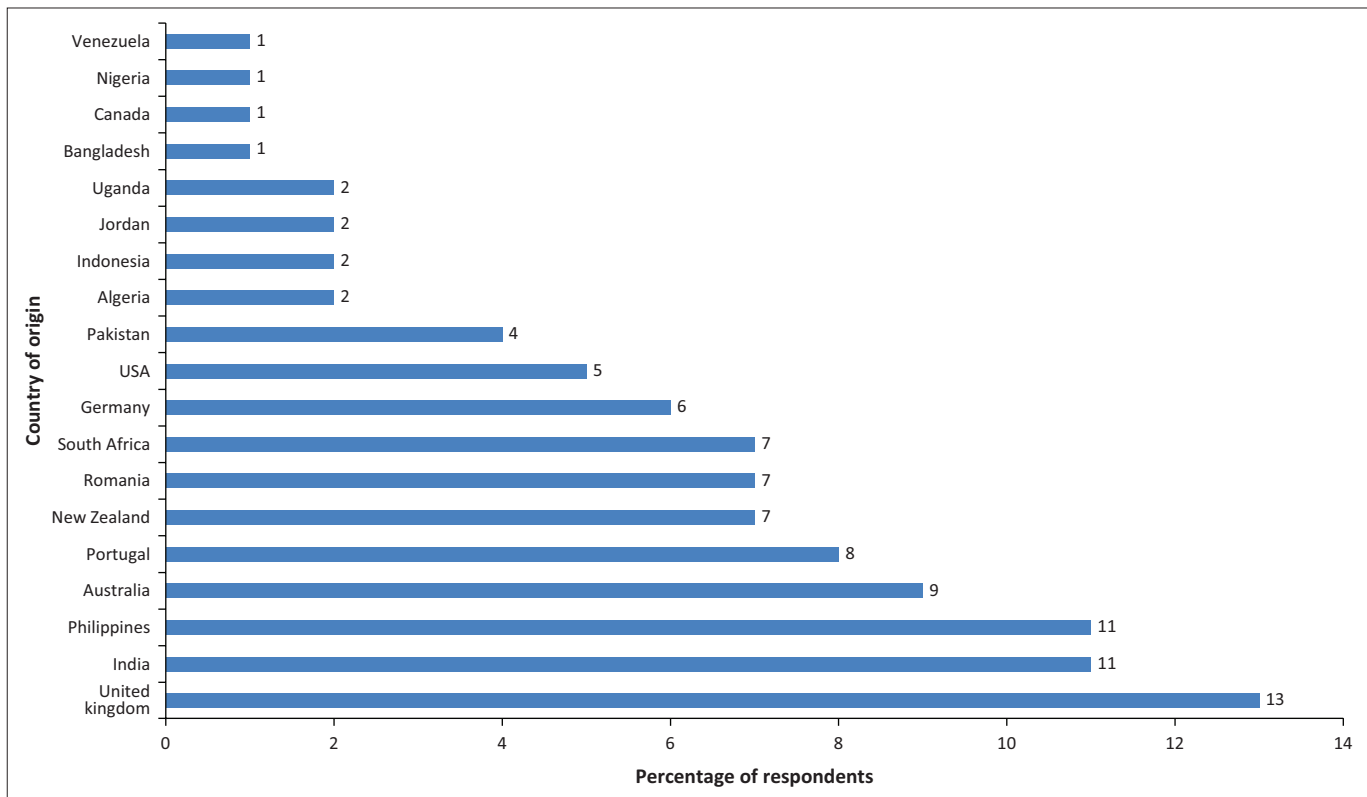
**FIGURE 1:** Expatriates' country of origin.

was briefed prior to the focus group discussion, and participants were informed that their responses would be treated as confidential and anonymous.

### Design

A research design involves the framework or plan that is used in a study to guide data collection and analysis (Pandey & Pandey, 2015). According to Leedy and Ormrod (2015), a research design is a systematic process of collecting, analysing and interpreting information to increase the understanding of a particular phenomenon. The research design applicable to this study was a case study, as the focus was on a single MNC.

### Analysis

The results from the quantitative study were captured in Microsoft Excel and both descriptive and inferential statistics were performed on the data. Statistica 13.2 was used for inferential data analysis. As indicated above, the quantitative data analysis enabled the researchers to formulate expatriate mentoring principles which were discussed in the focus group.

The responses from the focus group were transcribed by the research assistant. As qualitative data analysis is often inductive in nature, the researcher aimed to elicit reflections from the participants. The data analysis was thus not very structured and procedural (Saunders, Lewis, & Thornhill, 2016). The reflections from the participants served as valuable inputs in refining the final proposal of the expatriate mentoring plan.

**TABLE 1:** Demographic profile of respondents.

| Variable | % |
| --- | --- |
| Gender | |
| Male | 77 |
| Female | 23 |
| Age | |
| Between 23 and 30 | 25 |
| Between 31 and 40 | 43 |
| Between 41 and 50 | 21 |
| Between 51 and 60 | 11 |
| Employment level | |
| Entry | 5 |
| Artisan | 8 |
| Supervisory | 32 |
| Specialist or junior management | 29 |
| Middle management | 15 |
| Senior management | 11 |
| Tenure | |
| Between 2 and 5 years | 41 |
| Between 6 and 10 years | 32 |
| More than 10 years | 27 |

## Results

Figure 1 shows the country of origin of the respondents and that the majority of respondents were from the United Kingdom (13%). Other countries included Venezuela, Nigeria, Ghana, Bangladesh, Uganda, Jordan, Indonesia, Algeria, Pakistan, United States, Germany, South Africa, Romania, New Zealand, Portugal, Australia, the Philippines and India.

Table 1 displays the demographic profile of the respondents with regard to gender, age, employment levels and tenure.

Table 1 shows that most of the respondents were men, from the age group between 31 and 40 years. The majority of respondents were employed on supervisory level and most had been employed for 2–5 years.

The next section presents the responses pertaining to work-related adjustments (Section B of the questionnaire). The Pearson chi-square test was applied, using a significance level of 0.05. The equality of proportions was tested at 1 degree of freedom. The Disagree and Agree columns were combined to enable the analysis.

According to Table 2, a significant proportion of respondents indicated in question 2.1 that they had not been well prepared on what to expect prior to arriving at their new work environment. This applies to most of the findings

(e.g. question 2.2 on being well informed, question 2.4 on getting adequate training, question 2.5 on being equipped with the necessary tools, question 6.6 on the line manager being helpful, etc.). This shows that respondents were not adequately prepared for their new work environment. The exceptions, where there were no significant differences between the proportions of respondents who disagreed and those who agreed, occurred at questions 2.3, 2.8, 2.9 and 2.13 (respectively referring to whether the selection process had been fair; good work was recognised by the organisation; job satisfaction was experienced; and whether respondents felt overloaded).

The responses pertaining to personal-level adjustments (Section C of the questionnaire) are presented in Table 3. The Pearson chi-square test was applied, using a significance

**TABLE 2:** Pearson chi-square test results for work-related adjustment.

| Work-related adjustments | Disagree | Agree | Total | df | p |
|---|---|---|---|---|---|
| 2.1 I was well prepared on what to expect prior to arriving in my new work environment. | 225 | 166 | 391 | 1 | 0.003* |
| 2.2 I was well informed of my employer's expectations before I departed from my home country. | 239 | 152 | 391 | 1 | 0.000* |
| 2.3 The selection process was fair. | 188 | 203 | 391 | 1 | **0.448** |
| 2.4 I was provided with adequate training to fulfil my new employment roles and responsibilities. | 292 | 99 | 391 | 1 | 0.000* |
| 2.5 I was equipped with the necessary tools to enable me to perform my job. | 248 | 143 | 391 | 1 | 0.000* |
| 2.6 My line manager was very helpful in assisting me to adjust to the new environment. | 291 | 100 | 391 | 1 | 0.000* |
| 2.7 I received sufficient performance feedback from my line manager. | 303 | 88 | 391 | 1 | 0.000* |
| 2.8 Good work is recognised in my organisation. | 203 | 188 | 391 | 1 | **0.448** |
| 2.9 I am experiencing job satisfaction in my new role. | 205 | 186 | 391 | 1 | **0.337** |
| 2.10 Workforce diversity is well managed within my organisation. | 107 | 284 | 391 | 1 | 0.000* |
| 2.11 My new colleagues were welcoming and helpful. | 129 | 262 | 391 | 1 | 0.000* |
| 2.12 Company information (like policies and procedures) are easily accessible. | 70 | 321 | 391 | 1 | 0.000* |
| 2.13 I often feel overloaded with a heavy workload. | 195 | 196 | 391 | 1 | **0.960** |
| 2.14 I have received continuous social support from my supervisor. | 329 | 62 | 391 | 1 | 0.000* |
| 2.15 I have received continuous social support from my colleagues. | 140 | 251 | 391 | 1 | 0.000* |
| 2.16 I feel secure in my position at the current organisation. | 251 | 140 | 391 | 1 | 0.000* |
| 2.17 I have often considered resigning from my current employer. | 286 | 105 | 391 | 1 | 0.000* |
| 2.18 My organisation has repatriation support functions in place. | 292 | 99 | 391 | 1 | 0.000* |
| 2.19 Overall, I feel satisfied with the level of support my organisation provided me in adjusting to my new working environment. | 303 | 88 | 391 | 1 | 0.000* |

Note: Numbers in bold indicate significant values.

df, degrees of freedom.

*, Indicates a significance level of 0.05.

**TABLE 3:** Pearson chi-square test results for personal-level adjustment.

| Personal-level adjustments | Disagree | Agree | Total | df | p |
|---|---|---|---|---|---|
| 3.1 My family and I received cultural training pertaining to the new environment before leaving our home country. | 348 | 43 | 391 | 1 | 0.000* |
| 3.2 The selection processes used by my organisation ensured a suitable match. | 114 | 277 | 391 | 1 | 0.000* |
| 3.3 My employer managed all logistical arrangements (e.g. flights and transportation) effectively. | 70 | 321 | 391 | 1 | 0.000* |
| 3.4 I was provided intermediate accommodation when we arrived in the UAE. | 63 | 328 | 391 | 1 | 0.000* |
| 3.5 I received assistance with securing a permanent residence. | 212 | 179 | 391 | 1 | **0.095** |
| 3.6 I received assistance with furniture shipment from our home country. | 331 | 60 | 391 | 1 | 0.000* |
| 3.7 My employer provided Arabic language tuition for my family. | 368 | 23 | 391 | 1 | 0.000* |
| 3.8 My employer assisted with schooling arrangements for my children. | 346 | 45 | 391 | 1 | 0.000* |
| 3.9 My employer assisted with obtaining work permits. | 65 | 326 | 391 | 1 | 0.000* |
| 3.10 My employer provided assistance with employment opportunities for my spouse or partner. | 361 | 30 | 391 | 1 | 0.000* |
| 3.11 I was supplied with tax advice and guidance. | 297 | 94 | 391 | 1 | 0.000* |
| 3.12 My family was supported with a social welfare programme. | 352 | 39 | 391 | 1 | 0.000* |
| 3.13 My employer supplied me with a social buddy to assist with the adaptation. | 352 | 39 | 391 | 1 | 0.000* |
| 3.14 I am experiencing a good work–life balance within my current organisation. | 128 | 263 | 391 | 1 | 0.000* |
| 3.15 Overall, I am satisfied with the assistance my employer provided my family. | 262 | 129 | 391 | 1 | 0.000* |

Note: Numbers in bold indicate significant values.

df, degrees of freedom.

*, Indicates a significance level of 0.05.

level of 0.05. The equality of proportions was tested at 1 degree of freedom. The Disagree and Agree columns were combined to enable the analysis.

Table 3 indicates significant differences in proportions of agreement for all the findings, except question 3.5 on securing a permanent residence. Most of the respondents agreed that the selection process had produced a suitable match (question 3.2). The findings further confirm that the organisation had assisted respondents with logistical aspects such as finding accommodation (question 3.4), obtaining work permits (question 3.9) and finding work–life balance (question 3.14).

The organisation had not, however, adequately assisted with aspects such as cultural training prior to leaving the home country (question 3.1), appointing a social buddy (question 3.13, where the disagreed responses were overwhelming), providing language tuition (question 3.7), assisting with the schooling needs of children (question 3.8), finding employment for spouses (question 3.10) and providing support with accessing the social welfare programme of the country (question 3.12).

# Discussion

## Outline of the results

### Quantitative study

The respondents from the quantitative part of the study represented 19 countries were mostly between 31 and 40 years of age, and mostly (77%) men. This shows that the company seems to employ individuals from a variety of countries, mostly younger men. The majority of respondents were employed at supervisory level and had tenure between 2 and 5 years.

Regarding the work-related challenges, some aspects emerged as prominent. Respondents indicated that they had not been adequately informed of the expectations of the employer before departing their home country. According to Kawai and Mohr (2015), proper preparation of individuals is essential prior to departure, as this can reduce confusion and frustration. Only 25% of respondents agreed that they had been provided with adequate training to fulfil their new roles and responsibilities. Training of newly joined expatriate employees is key to the success of an expatriate assignment (Abdullah & Jin, 2015). It can thus be concluded that respondents in general had not been well prepared prior to their arrival in their host country.

Seventy-four per cent of respondents disagreed that their new line managers assisted them in adjusting to their new work environment, and 77% disagreed that they received sufficient performance feedback from their line managers. Furthermore, 84% of respondents disagreed about having received social support from their supervisors. These findings indicate a lack of proper assistance from line managers.

Regarding social support from work colleagues, 64% of respondents agreed that they did, in fact, receive social

support from colleagues, and 64% of respondents felt secure in their current position. According to Imran, Majeed, and Ayub (2015), job security is an important variable that directly affects employees' organisational satisfaction and their level of commitment. However, 77% of respondents disagreed with feeling satisfied with the overall support received from the company. Because perceived organisational support is crucial for effective expatriate adjustment (Cole & Nesbeth, 2014), this is a significant finding that needs to receive attention from management.

Regarding personal-level adjustments, the findings reveal that 89% of respondents disagreed that their family members had received cultural training pertaining to their new environment. Forty-six per cent also disagreed to having received assistance from their organisation to ship their furniture from their home country. Only 6% of respondents agreed that they received Arabic language tuition for themselves and their family members. According to Bock and Schulze (2016), the ability to speak Arabic in the UAE is important in order for expatriates and their families to adjust successfully. Ninety-two per cent disagreed that their employer provided assistance with employment opportunities for their spouses or partners. Moreover, 90% of respondents disagreed that their families received support with accessing the social welfare programme of the country, and a further 93% indicated that the organisation did not support them with a social buddy.

Thus, the findings show that personal challenges were not sufficiently attended to, which could contribute to failed expatriate assignments within the company. In this regard, the literature (see Cole & Nesbeth, 2014; Lee & Kartika, 2014; McNulty, 2012; Sarkiunaite & Rocke, 2015) highlights expatriate family adjustment and family satisfaction as key elements in preventing failed expatriate assignments.

### Qualitative study

Based on the literature review and quantitative analysis, the following six principles of expatriate mentoring were formulated:

- Structured interaction: Expatriate mentoring should take place in a structured environment with coordinated interaction between mentors and mentees. Line managers should also be part of the process, as it is imperative that they be aware of the challenges expatriate employees are experiencing.
- Clear objectives: Mentees need to set specific objectives on what they aim to achieve with mentoring. These objectives should be informed by their own work and personal goals.
- Target dates: Target dates should be articulated clearly in order for expatriates to achieve specific objectives by specific dates.
- Regular reflection on challenges: Expatriates need to reflect regularly on their work-related and personal challenges. Areas of immediate concern also need to be stipulated regularly.

- Formal evaluation: Parties involved should evaluate each other formally and on a regular basis. This includes the evaluation of mentees by their mentors and line managers, and mentees evaluating their mentors and line managers.
- Remedial action: All parties should be open to remedial action. This applies to mentees, mentors and line managers. Remedial action should be committed to in writing.

As indicated previously, these principles were discussed during the focus group session and the following inputs were captured:

- Structured interaction: Because the primary mentor is often not available, the mentee needs an alternative person who could assist with immediate challenges, hence, the rationale for having a secondary mentor. There was consensus that the secondary mentor be appointed and available (with no official responsibility) as a stand-in for the primary mentor. The important role of the line manager in assisting with expatriate adjustment was discussed as well, and the group agreed that the line manager needs to form part of the mentoring committee, together with the primary and secondary mentor. The group also proposed that the second-line manager forms part of the mentoring committee, if applicable.
- Clear objectives: The need to set clear objectives were reiterated as well as aligning these objectives with the Personal Development Plan (PDP) for each individual – as this does not always happen. Concerns were also expressed with regard to the commencement of the mentoring process: It was suggested that mentoring start prior to the employment process and not form part of the induction process. Mentoring should be a separate structured process, according to the group.
- Target dates: Although expatriate employees should set realistic targets for themselves, the group felt that the frequency of mentoring meetings should be stipulated. It was suggested that specific target dates be mutually agreed upon in writing. The group agreed that expatriate mentoring should apply not only to newly appointed expatriates but also to those who move to other positions.
- Regular reflection on challenges: The principle of regular reflection also relates to the frequency of mentoring. In this regard, some focus group members reiterated that the frequency of mentoring be based on individual needs and challenges. Some individuals might require more frequent interaction with the mentor or mentoring committee than others.
- Formal evaluation: In keeping with the advantages of having a constructive relationship, some members of the focus group expressed the need for parties to formally evaluate each other. This would imply the formal evaluation of not only the mentee but also the primary and secondary mentors, as well as the line manage and second-line manager, if applicable. Thus, the mentoring plan should include formal evaluation guidelines and an evaluation rubric for this purpose.

- Remedial action: The focus group expressed concerns related to remedial action and commented that line managers also be subjected to remedial action, not only mentees. It was proposed that remedial action for mentees, mentors and line managers be formulated regularly, in writing. The assumption is that this process would enhance the reciprocity of the mentoring relationship, emphasising that both parties need to contribute to forming a constructive relationship.

Based on these principles, the following outline for an expatriate mentoring plan was proposed: (1) details of the mentee; (2) the mentoring objectives; (3) details of the primary and secondary mentor; (4) details of the mentoring committee which includes the line manager and second-line manager, if applicable; (5) an analysis of the mentee's short-, medium- and long-term career goals; (6) work-related adjustment challenges of the mentee; (7) personal-level adjustment challenges of the mentee; and (8) target dates for meeting specific objectives; followed by (9) a formal evaluation of the mentor by the mentee, according to an evaluation rubric; (10) a formal evaluation of the mentee by the mentor, according to an evaluation rubric; (11) a formal evaluation of the line manager by the mentee according to an evaluation rubric; and, finally, (12) remedial action for the mentee; (13) remedial action for the mentors; (14) remedial action for the line manager; and (15) signatures of all relevant parties.

## Practical implications

Based on the findings of the study, the following principles should be applied to expatriate mentoring and incorporated into expatriate mentoring plans: structured interaction, clear objectives, target dates, regular reflection on challenges, formal evaluation and remedial action.

## Limitations and recommendations

One limitation of the study is that only one MNC in the context of the UAE was investigated. However, the study provides specific principles that can inform the compilation of expatriate mentoring plans, which might be useful to other MNCs.

Based on the literature, quantitative analysis and reflections from the focus group discussion, the following guidelines are proposed for compiling expatriate mentoring plans:

- Expatriate mentoring should ideally involve a primary and secondary mentor.
- An expatriate's line manager should be part of the mentoring process, as it is necessary for the line manager to understand the work-related and personal challenges expatriates are facing.
- A mentoring committee should be appointed for each expatriate employee, consisting of a primary and secondary mentor, the line manager and possibly a second-line manager.

- The mentoring committee members should evaluate each other regularly. Evaluation intervals should be mutually decided upon in writing.
- An expatriate mentoring plan should contain clear mentoring objectives, as well as an analysis of the mentee's short-, medium- and long-term goals.
- The mentoring objectives should be aligned with the employee's PDP and job-specific roles and responsibilities.
- Target dates and actions should be decided upon and articulated clearly.
- Expatriate mentoring should stimulate regular reflection on the part of the mentee pertaining to work-related and personal-level challenges. This aspect is highly personalised, as mentees will have different needs and challenges.
- Expatriate mentoring should not only apply to newly appointed expatriate employees but also to all expatriate employees changing roles within the organisation.
- Expatriate mentoring should be implemented during the initial stages of employment and not as part of the formal induction programme.
- Remedial action should apply to mentees, mentors and line managers alike.

These proposed guidelines for expatriate mentoring involve an intense process in which mentees, mentors and line managers are in constant interaction and the challenges expatriates face can be dealt with in a structured and coordinated way. Although it is likely to be time consuming, this approach is aimed at showing the commitment of the company towards the successful adjustment of expatriate employees. This concurs with Kawai and Strange (2014) who found that perceived organisational support has a positive impact on expatriate adjustment.

## Conclusion

Owing to the complexity of working and living in a foreign country, MNCs must support expatriates in adjusting to their new environment. One way of doing this is having a formal mentoring plan in place. This paper proposed specific principles that can guide the formulation of an expatriate mentoring plan. The principles include structured interaction, clear objectives, target dates, regular reflection on challenges, formal evaluation and remedial action.

# Acknowledgements

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# Total rewards that retain: A study of demographic preferences

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**Orientation:** Changing workplace demographics and a dearth of employees with scarce skills have forced employers to better understand the various factors that retain talented employees.

**Research purpose:** In this empirical study, the reward preferences and ideal combination of total reward elements (based on an estimation of their relative importance) that retain employees from various demographic groups, including employees of different race, gender and age groups, were investigated.

**Motivation for study:** Organisations are competing for talented employees and to benefit from the value these individuals add, it is required of them to stay at the respective businesses. Previous studies have indicated that employees who are offered a reward package that is aligned to their personal preferences are prone to stay longer at the organisation and to be more engaged at work. However, new and novel ways need to be found to identify the reward preferences of employees.

**Research design, approach and method:** A quantitative approach and descriptive research design was employed to estimate the individual reward preferences and identify an ideal mix of total reward elements that retain different cohorts of employees. Three questionnaires were distributed, including a Remuneration Managers Questionnaire ($n = 7$), a Remuneration Preference Questionnaire ($n = 368$) and a Choice-based Conjoint Task Questionnaire ($n = 368$). The latter two questionnaires were distributed as an online questionnaire to South African businesses and consisted of eight choice-based conjoint tasks, as well as a field survey.

**Main findings:** The results of the choice-based conjoint analysis revealed that all respondents considered financial rewards (Benefits, Performance and Recognition, Remuneration, Career, in that order) as relatively speaking, the most important components in their total rewards package that would lead to their retention. For most demographic groups, the remaining three places (i.e. ranked) were Career Advancement, Learning and Work–life balance. Work–life balance was found to be relatively more important for Generation Y than career advancement. For those employees with only a matric qualification and those in non-managerial positions, access to learning opportunities were the least important in their retention.

**Practical/managerial implications:** Human Resource managers and line managers should note that reward elements should be chosen and offered as total reward packages in such a way as to best be able to attract, engage and retain talented employees.

**Contribution/value-add:** The findings of the present study adds value in a sense that it assists organisations in creating customised reward packages that best suit the needs of both employees and them as employers. Providing a more ideal or preferential combination of reward elements can, by increasing retention and engagement, provide a competitive advantage for organisations.

## Introduction

### Key focus of the study

Employee engagement and retention are overwhelmingly cited by the Chief Executive Officers of some of the largest and fastest growing companies, as the number one priority on the Human Resource or Human Capital agenda (Frank, Finnegan & Taylor, 2004; Schlechter, Faught & Bussin, 2014). Business strategies, products and services can often be replicated, but it is nearly impossible to replicate a company's talent pool, a fundamental aspect whereby a business distinguishes itself from its competitors (Jensen, McMullen & Stark, 2007).

### Background of the study

The turnover of critical or key staff members, often referred to as talent, is associated with significant direct and indirect costs to an organisation. These costs include, for example, the costs associated

with recruitment and selection, as well as intangible costs such as the loss of productivity, quality shortfalls, poor morale among the remaining employees, negative impact on customers/clients and loss of organisational knowledge when employees leave (Krishnan, 2009). The tangible and intangible costs to the company are estimated to be higher than the annual salary of a departing employee (Corporate Leadership Council, 2004). For such reasons, the retention of human capital or human resources has become a business imperative, in terms of running a successful and sustainable business.

To succeed in the so-called war for talent, employers need to have a clear understanding of how various reward factors influence whether talented employees choose to stay or leave an organisation (Dibble as cited in Kotze & Roodt, 2005). Cohorts of employees, such as those coming from diverse demographic groups, have different expectations and demands of their work environment. As a result, a one-size-fits-all retention strategy has proven not to be effective (Bussin, 2012). The primary research question in the present study was 'What is the ideal total reward mix of reward elements that will retain skilled employees from specific demographic groups?'

## Trends from the research literature

The successful retention of human capital in the global workplace has been affected by extensive changes in workforce demographics, as organisations are required to manage more diverse groups of talent pools (Snelgar, Renard & Venter, 2013). In the United States, growing numbers of ethnic minorities are entering the labour market. In the South African context, the *Employment Equity Act* (No. 55 of 1998) has been instrumental in changing the demographic profile of the local labour market. South African businesses act, or should act, as catalysts for developing equity employees who were under-developed during the apartheid era (Maisela, 2001; Nzukuma & Bussin, 2011; Tucker, Kao & Verma, 2005). The transformation of the workforce is therefore high on the agenda in South African organisations. The dearth of black talent and the resulting competition between companies to attract such individuals as necessitated by redress legislation, adds a further dimension to the retention challenge within the South African context.

The notion that organisations should develop relevant and targeted reward packages and retention strategies to best suit multiple needs, across different demographic cohorts (e.g. generations, genders or race groups), has been the focus of research over the last few years (Codrington, 2008; Schlechter et al., 2014; Snelgar et al., 2013; Sutherland, 2004). Within the South African context, it has been found that specific reward strategies are related to the retention of Generation X, female employees and black professionals (Bussin & Toerien, 2015; Kotze & Roodt's, 2005; Krishnan, 2009; Masibigiri & Nienaber, 2011; Schlechter et al., 2014).

## Research objectives

The present study had two main research objectives: (1) to develop a better understanding of the total reward preferences within a South African business context; and (2) to identify the ideal or most desirable mix of total reward elements or total reward packages that would specifically retain employees from various demographic groupings.

## The potential value-add of study

The findings of the present study contribute to the literature on reward preference. The findings have relevance and are important for workplaces, given the scarcity of skills and high competitiveness among companies in needing to retain such employees. Organisations will hopefully benefit from the findings of this study by using the results to customise reward packages in such a manner that they are based on demographic preferences and so allow them to more effectively retain key employees.

## What will follow

The following literature review indicates different reward types from which the framework of the study was developed. Furthermore, the reward preferences for different race, age and gender groups are described. After this, the research method is explained and the results illustrated. The article concludes with a discussion of these results and the practical suggestions/recommendations that follow from these.

# Literature review

A total rewards model that involves the integration of five key elements that attract, motivate and retain the talent required to achieve desired business results and lead to employee job satisfaction and engagement namely was developed by WorldatWork (2007) and comprises the following elements:

- Remuneration: cash provided by an employer to an employee for services rendered.
- Benefits remuneration: programmes that an employer uses to supplement the cash remuneration an employee receives. These satisfy protection needs.
- Work-life balance: organisational practices, policies and programmes as well as a philosophy that actively supports an employee's efforts to be successful within and outside the workplace.
- Performance and recognition: involves the alignment and subsequent assessment of organisational, team and individual efforts towards the achievement of business goals and organisational success. Recognition gives special attention to employee action, efforts, behaviour and performance.
- Development and career opportunities: comprises learning experiences designed to enhance employee skills and competencies. Career opportunities involve plans to help employees pursue their career goals. These are relational needs that bind workers more effectively to an organisation as they satisfy individual's needs such as personal development and fulfilment.

Pay (compensation or remuneration) is the most commonly cited reward element used in retention strategies

(Bussin, Nicholls & Nienaber, 2016). In reality though, pay has been found to be the fifth most common reason for leaving an organisation (Bussin, 2012). The most important rewards that retained talented workers from the fields of science, technology, financial services and information technology were financial rewards, recognition and developmental opportunities (Bussin & Toerien, 2015; Kinnear & Sutherland, 2000). These findings were corroborated by De Vos and Meganck (2008); Horwitz, Heng and Quazi (2003); Horwitz et al. (2006) as well Sutherland and Jordaan (2004). In a study of employees in South Africa and Singapore, it was found that employees were retained most effectively when provided with challenging assignments and fulfilling work, as well as incentive and performance bonuses (Horwitz et al., 2006). Others found that reward elements relating to personal comfort including medical aid benefits, social relations at work, pension and contractual obligations did not retain employees (Sutherland & Jordaan, 2004; Van Rooy & Bussin, 2014). The lack of value placed on traditional retention strategies such as work–life balance practices, for example, extra vacation time, childcare facilities or teambuilding exercises was reported by Birt, Wallis and Wintermitz (2004).

## Rewards that retain employees of different races

Limited social science and business literature exists in South Africa to indicate the mix of total rewards that retain previously disadvantaged individuals (PDIs), as described in the *Employment Equity Act* (No. 55 of 1998). Black professionals considered work environments with strong Employment Equity (EE) initiatives and diverse work groups as key retention factors (Maisela, 2001). In a study of demographic differences in retention factors affecting managerial and specialist bank staff indicated that PDIs rated performance standards, diversity, competitive remuneration and employer of choice perception as rewards that were less likely to retain them, than non-PDIs (Kotze & Roodt, 2005). In a study of black professionals, it was noted that this group was more likely to remain in their current job because they valued the work they were engaged in rather than the company they worked for (Booysen, 2007; Khanyile & Mapongo, 2007; Mmolaeng & Bussin, 2012).

## Rewards that retain different genders

In South Africa, women are classified as equity candidates under the *Employment Equity Act* (No. 55 of 1998). Limited literature exists both in South Africa and internationally to indicate the reward elements that specifically retain female employees. A study that investigated the career paths of women who had left organisations discovered that in 51% of the cases women joined rival organisations in more prestigious positions (Krishnan, 2009).

## Rewards that retain employees of different age groups

Generation is a term used to refer to people born in the same general time span and who share historical or social life experiences. Because of similar life experiences, each generation develops a unique personality that determines their feelings towards authority and organisation. This generational personality also is thought to influence what individuals expect from their employer and how they intend to satisfy such needs (Bussin, 2012; Gursoy, Maier & Chi, 2008; Snelgar et al., 2013; Towers Perrin, 2003).

In South Africa, experienced non-PDI employees aged 50+ will be exiting the labour market over the next 10 years, leaving a large skills gap, which the current education system is failing to address (D'Amato & Herzfeldt, 2008). This has created a situation where employers need to ensure that they can grow and retain their young talent, even though this is becoming an increasingly difficult task with skilled professionals of all races increasingly choosing to frequently change jobs in an effort to satisfy their need for quick career development and progression (Nzukuma & Bussin, 2011; Temkin, 2008; Van Rooy & Bussin, 2014).

According to a study conducted by Towers Perrin (2003), employees aged between 18 and 29 typically value base salary, variable pay and company shares the most, while employees aged between 30 and 44 typically value medical aid, base salary and deferred remuneration. Employees aged between 45 and 54 are thought to view base salary, deferred remuneration and retirement funding as important while employees of 55 years or older value retirement funding and base salary equally together with medical aid.

Baby Boomers (those born between 1946 and 1964) make up a sizeable portion of the current workforce and have extensive knowledge and business experience. Literature indicates that this generation is retained by benefits programmes such as medical aid and retirement benefits and initiatives to assist in preparing for their retirement (Tiku, 2007). These findings are supported by Wallace (2006) in a study of generational differences across the legal profession where pay was deemed to be more important to Baby Boomers than to Generation X'ers (those born between 1965 and 1980). Instead, Generation X and Generation Y (those born between 1981 and 2000) employees are believed to be more independent and self-reliant than Baby Boomers; they are likely to have multiple careers; are prepared to make rapid career transitions and leave an organisation when their needs are not being met; and emphasise work–life balance (D'Amato & Herzfeldt, 2008).

The most successful reward elements to retain Generation X employees include the offer of career development opportunities, including jobs that aid this generation in advancing to the next job, career ladders and providing challenging assignments (D'Amato & Herzfeldt, 2008; Smit, Stanz & Bussin, 2015). These rewards are in alignment with this generation's need to be loyal to their own skills as opposed to a particular company. A focus group study of Generation X'ers highlighted their need to leave work at work, as well as trying to strike a balance in their lives (Gursoy et al., 2008). These findings were supported in a study where work–life programmes such as sabbaticals and flexitime were popular

among Generation X'ers (Gabriel, 1999). Work–life balance and flexibility options such as flexitime, encouraging the use of online social networks like Facebook and Twitter or flexi office are seen as ways to satisfy the Generation Y's need for loyalty to their lifestyle rather than their job (Roy, 2008).

Therefore, the current study has two main research questions that it aims to address: what is the mix and the desired amount of total rewards that retain employees from various demographic groups, which – in the context of the current study – refers to knowledge workers and employees from different race, gender and age groups. The second question is what elements of total rewards do employees deem important in their retention.

# Research design

## Research approach

A descriptive research design, following a quantitative approach was employed to address the research objectives.

## Research method

Six total reward elements were identified using the WorldatWork Total Rewards model (2007). Even though the model suggests five reward elements, it was decided to split training and development (learning) opportunities from career advancement. These reward elements were identified as commonly applicable in many large organisations according to a Remchannel South African Benefits Guide survey (2007). A field survey and choice-based conjoint analysis, also referred to as choice-based modelling, was used to investigate the relative importance of the reward elements in retaining employees of different demographic groups.

Rather than asking survey respondents directly what attributes they find most important (as is done in the field survey), conjoint analysis utilises a more realistic context of respondents evaluating potential profiles. Conjoint analysis is based on the assumption that individuals perceive products, reward packages in this instance, as consisting of a number of attributes (each with levels) that each offer a measure of worth or value or utility. Conjoint analysis identifies the relative worth of each of the attributes making up a product or service or concept in order to find the offering or combination that contains the most desirable constellation of attributes. This method replicates real-life decision making in that individuals cannot obtain everything that they desire and have to psychologically make trade-offs between various combinations, unlike typical survey approaches were items are considered one at a time (i.e. can obtain everything that they desire).

## Measuring instruments

### Questionnaire 1: Remuneration Managers Questionnaire

The purpose of the first questionnaire was to receive expert input from remuneration managers as to the reward package they would construct to retain three hypothetical employees, namely Employee A – someone with critical skills, Employee

B – someone with technical skills and Employee C – someone who is not considered key talent and readily replaceable. Employee A was classified as scarce talent and thought to pose a high retention risk to the company were they to resign. Employee B was considered to pose a moderate retention risk. Employee C was not considered key talent.

Employee C was considered to be the recipient of the lowest level of rewards and would equate to level 3 (low) in the choice-based conjoint task. Employee A, the recipient of the highest level of rewards, would equate to level 1 (high) and Employee B to the intermediate level or level 2 (medium) in setting up the choice-based conjoint tasks.

### Questionnaire 2: Total Rewards Preference Questionnaire

A second questionnaire was developed and was based on the WorldatWork Total Rewards model (2007). This scale was designed to measure which total rewards respondents deemed most important in deciding whether to stay or leave their current organisation. Responses were recorded on a 5-point Likert-type scale where 1 represented 'Not at all important' and 5 indicated 'Very Important'. The scale comprised 20 questions covering 6 total rewards namely: (1) Performance and recognition, (2) Work-life balance, (3) Learning, (4) Career advancement, (5) Remuneration and (6) Benefits.

### Questionnaire 3: Choice-Based Conjoint Task Questionnaire

The third questionnaire comprised computer-generated conjoint tasks. Each conjoint task is a random combination of the various levels of the reward elements (attributes). This was used to assess employee preferences by determining the relative importance of reward elements (by calculating part-worths).

## Research procedure

Before administration, ethics clearance was obtained and the online questionnaire piloted on a small group of employees who are members of South African Reward Association (SARA). The survey was amended using the results from the pilot group. The survey was completed online and respondents were given 3 weeks to do so. An email reminding the employees of the closing date was sent after the first week to encourage participation.

## Research participants

A non-probability sampling method, namely convenience sampling, was employed throughout.

### Descriptive statistics for demographic characteristics of the respondents

**Questionnaire 1:** The first questionnaire was circulated to 15 remuneration managers across a variety of industries in South Africa and seven usable responses were received (47% response rate). The majority (86%) of the companies represented by them were from the private sector, while the remaining 14% were from the Government or Quasi Government Sectors.

**Questionnaires 2 and 3:** The second and third questionnaires were distributed within a multinational oil company based in Cape Town, as well as companies who are Corporate Members of the SARA. Approximately 600 of the second and third questionnaires were distributed and 361 usable responses were received, representing a 60% response rate. A description of the demographic composition of the realised sample for the second and third questionnaires is provided in Table 1.

The majority of respondents (56%) were women, and these results are considered typical of the gender demographics of the South African workplace. The sample consisted of predominantly white respondents (54.3%) with African and mixed race groups, collectively, having nearly equal representation. The majority of the sample (79%) were 31 years and older. Eighty-six percent of the sample had obtained a post matric qualification. The single largest groupings of respondents (36.6%) were in non-managerial roles with the majority operating in individual contributor or specialist roles. For the purposes of analysis, the following groups were combined to ensure a more balanced sample: Mixed race and Indians were combined into African under the race group sample (i.e. creating more balanced black and white respondent groups). Education level was revised to reflect the education classifications of Degree (3 years) and Diploma as Undergraduate-level qualification, while Honour's, Master's and Doctorates were reclassified as Postgraduate-level

qualification. Job-level categorisation was altered to combine the categories of Middle Management with Supervisor or Team Leader to form one category labelled Middle Management, while Senior Management and Executive categories were collapsed into one job level.

## Statistical analysis

The data obtained with Questionnaire 1 were analysed using descriptive statistics, while the data obtained from Questionnaire 2 were analysed using descriptive and inferential statistics, including $t$-tests and Analysis of Variance. The unidimensionality of the scale was also assessed. The data obtained from Questionnaire 3 were analysed using choice-based conjoint analysis. Individual part-worths were calculated based on Hierarchical Bayes modelling.

## Results
### Questionnaire 2: Total Rewards Preference Questionnaire

Principle Component Analysis (PCA) using Varimax, with Kaiser Normalisation rotation was used to establish the underlying factor structure of the scale, which was based on the WorldatWork Total Rewards model (2007). PCA is indicative of the construct validity of the measure (Hair, Babin, Money & Samouel, 2003). Reliability was assessed using Cronbach's alpha and following the SPSS item analysis technique. The results obtained from the PCA suggested that the questionnaire was valid (factor loadings ranged from 0.669 to 0.872) and reliable (Cronbach's alphas ranged from 0.68 to 0.73).

Descriptive statistics were calculated based on the composite scores for the factors, based on the PCA-derived scale's measurement model. Figure 1 provides a graphical representation of the Means of the total reward elements for the various demographic groups. The results indicate that overall, Remuneration and Benefits were rated as the most important total reward elements in retention. Performance and recognition was rated second most important, although Baby Boomers rated this factor lower than other respondents. Work–life balance practices, Learning and Career advancement were rated similarly in overall preference while work–life balance climate was rated lowest overall in terms of its importance in retention.

**TABLE 1:** Demographic Characteristics Sample for Questionnaires 2 and 3.

| Demographic characteristic | Frequency | Percentage |
|---|---|---|
| **Gender** | | |
| Female | 202 | 56.0 |
| Male | 159 | 44.0 |
| **Racial classification** | | |
| African | 60 | 16.6 |
| Mixed race | 62 | 17.2 |
| Indian | 35 | 9.7 |
| White | 196 | 54.3 |
| Prefer not to disclose | 8 | 2.2 |
| **Age groups** | | |
| 21–30 | 74 | 20.5 |
| 31–40 | 132 | 36.6 |
| 41–50 | 107 | 29.6 |
| 51–60 | 45 | 12.5 |
| 61–65 | 3 | 0.8 |
| **Education level** | | |
| Matric | 51 | 14.1 |
| Diploma | 55 | 15.2 |
| Degree (3 years) | 97 | 26.9 |
| Honours (4th year first Postgraduate qualification) | 108 | 29.9 |
| Masters | 47 | 13.0 |
| Doctorate | 1 | 0.3 |
| Not applicable | 2 | 0.6 |
| **Job level** | | |
| Non-managerial | 132 | 36.6 |
| Supervisor or team leader | 46 | 12.7 |
| Middle management | 95 | 26.3 |
| Senior management | 50 | 13.9 |
| Executive | 15 | 4.2 |
| Not applicable | 23 | 6.4 |

$N$ = 361.

### Differences between genders

An independent-samples $t$-test revealed there was a statistically significant difference between men ($M$ = 4.19, SD = 0.64) and women [$M$ = 4.33, SD = 0.61; $t$ (359) = 2.18, $p$ = 0.02, two tailed] for the measure of Learning and Career Advancement ($p$ < 0.05), with women seemingly placing greater importance on this factor in their retention than men.

### Differences between race groups

There was a statistically significant difference between white people ($M$ = 4.13, SD = 0.64) and black people [$M$ = 4.43, SD = 0.58; $t$ (351) = 4.55, $p$ = 0.00, two tailed]
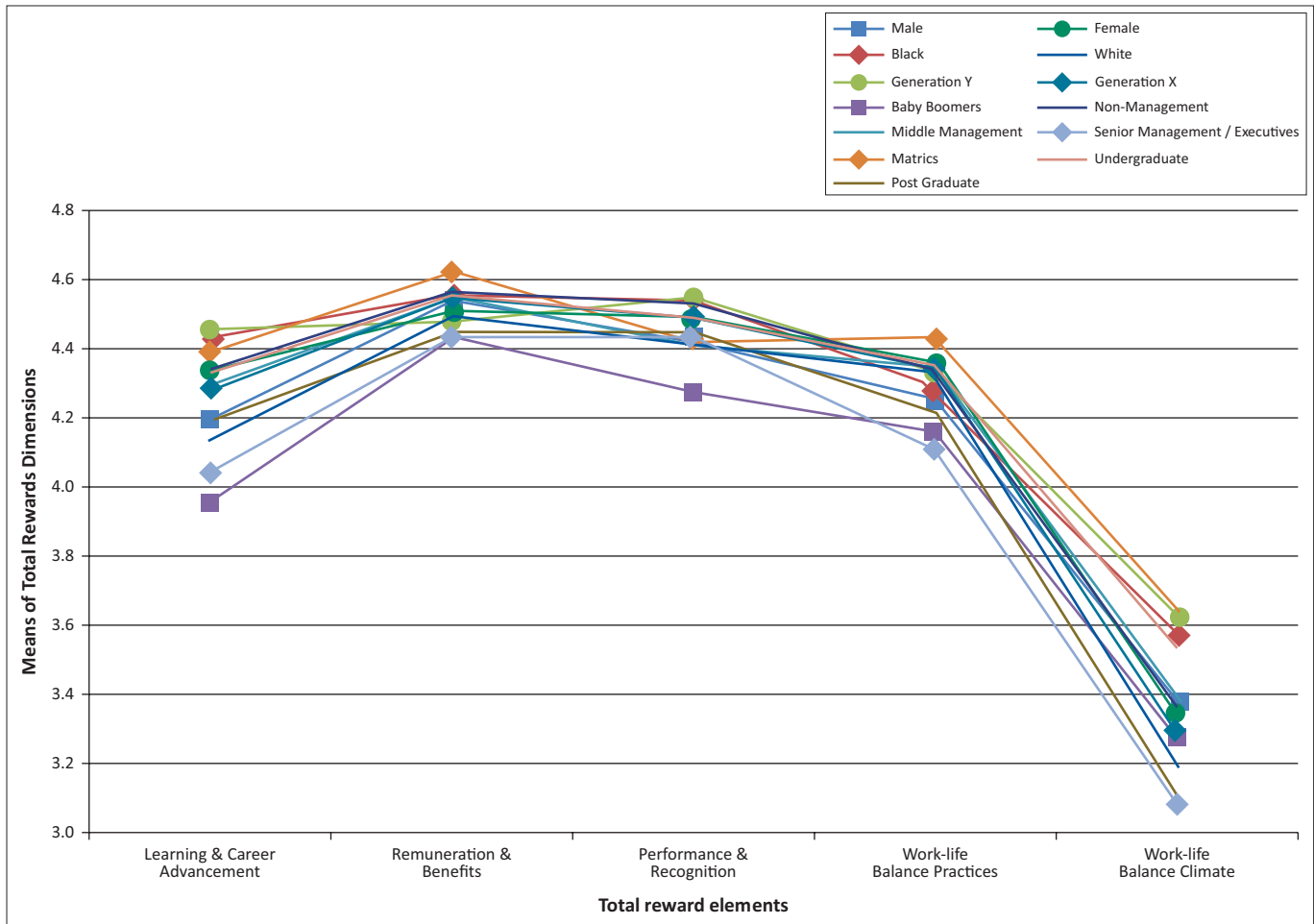
**FIGURE 1:** Comparison of the means of total rewards across demographic groups based on survey data.

for the Learning and Career advancement measure ($p < 0.05$) where black people considered this factor to be more important in their retention than white people. The second statistically significant difference that was noted between white people ($M = 4.41$, SD = 0.48) and black people [$M = 4.54$, SD = 0.46; $t$ (351) = 2.64, $p = 0.00$] pertained to the measure of Performance and recognition ($p < 0.05$), where black employees considered this factor key in their retention. The third statistically significant difference was noted between white people ($M = 3.19$, SD = 0.94) and black people [$M = 3.57$, SD = 0.85; $t$ (351) = 3.94, $p = 0.00$, two tailed] for the measure of work–life balance climate ($p < 0.05$), where black people considered this factor to be more relevant in their retention than white people.

## Questionnaire 1: Remuneration Manager Questionnaire

The results of Questionnaire 1 were used to design the conjoint tasks used in Questionnaire 3. The data were analysed by first focusing on the question with the highest percentage of responses under the category of Employee C and was eliminated and classified as level 3 in the conjoint task. The question with the highest percentage of responses for Employee B was then used to establish level 2 of the conjoint task, before being removed for further analysis.

The remaining questions with the highest percentage for Employee A were then translated into level 1 of the conjoint task. Where the results were equal across employees, a judgement was made as to whether the item should be classified as level 1, 2 or 3. The final set of attributes and levels are indicated in Table 2.

## Questionnaire 3: Choice-Based Conjoint Task Questionnaire

A method of assessing the reliability of a conjoint model is to determine the goodness-of-fit of the estimation model and is done by using the MultiNomial Logit model. For each iteration, the log-likelihood is reported together with a value of RLH (Root LikeliHood). This is a measure of how well the model fits the choice data, which means a respondent who answered inconsistently would have a low RLH value of 0.25 and the best possible value is 1.0 (Eggers, Farsky & Gerber, 2009; Sawtooth Software, 2008). An RLH below 0.25 was reported for one respondent. All other respondents scored above this value, with 0.93 being the highest RLH value. This indicates that there was a high level of reliability for this model. The ratio of correctly predicted choices is called the hit rate, which is a common validity measure (Eggers et al., 2009; Schlechter et al., 2014). The hit rate for the conjoint model in this study

**TABLE 2:** Relative importance of the attributes.

| Attribute | Level | Level description | Utility | Relative importance of attribute (%) | Ranking |
|---|---|---|---|---|---|
| Learning | 3 | On-the-job training | -153.17 | 9.1 | 5 |
| | 2 | Tertiary Education Tuition Assistance | 9.76 | | |
| | 1 | Leadership or management development programmes | 143.41 | | |
| Career advancement | 3 | Promotion within current business unit or function | -132.94 | 10.3 | 4 |
| | 2 | Exposure to opportunities or projects outside of your current department or business unit – may include overseas assignments | 203.03 | | |
| | 1 | Fast tracking career progression to executive or senior management levels | -70.08 | | |
| Remuneration | 3 | Base salary targeting the middle of the market | -349.94 | 17.0 | 3 |
| | 2 | Base salary targeting the upper end of the market | 147.46 | | |
| | 1 | Base salary targeting the top end of the market and retention bonus | 202.48 | | |
| Benefits | 3 | 0% Employer contribution to retirement fund plus basic medical cover | -679.13 | 35.2 | 1 |
| | 2 | Employer contributes 50% of total retirement fund contribution plus moderate level of medical cover | 210.18 | | |
| | 1 | Employer contributes 100% of total retirement fund contribution plus highest level of medical cover | 468.94 | | |
| Work-life balance | 3 | Flexible work hours | 171.32 | 8.4 | 6 |
| | 2 | Work from home | -101.70 | | |
| | 1 | Reduced work schedule or work load | -69.61 | | |
| Performance and recognition | 3 | On-the-spot awards, for example, gift vouchers, verbal recognition | -355.00 | 20.0 | 2 |
| | 2 | Short-term incentive linked to your performance | 58.28 | | |
| | 1 | Short-term incentives linked to your performance plus stock options or shares | 296.71 | | |

$n$ = 368.

was 38.5%, which means that the model was able to produce 38.5% correct predictions from the holdout set. With four alternatives in the holdout set, a chance model would have resulted in 25% of predictions being correct (Schlechter et al., 2014). The hit rate for this study needs to be interpreted in the context of the holdout stimuli being developed on the basis of chance given that no previous research existed to guide the design of the stimuli. As such, a 38.5% hit rate is considered reasonable. As a second measure of validity, the absolute sum of differences between actual choice shares and predicted choice shares on an aggregated level were calculated, resulting in a Mean Absolute Error of prediction of 3.2%. This indicates that deviation in the share prediction per alternative is very low and is considered satisfactory (Eggers et al., 2009). Based on this basket of evidence, it was concluded that the conjoint study was valid and reliable.

Derived utilities are used to calculate the relative importance of individual attributes. The range of utilities within each attribute was calculated using the difference between the highest and lowest utilities per attribute, divided by the sum of the ranges across all attributes. Each attribute's utility range is expressed as a percentage of the sum of the utility ranges across all attributes. These percentages provide an indication of the importance employees attach to the various total reward attributes in their ability to retain employees (Schlechter et al., 2014). Attributes with a larger range have a greater impact on the calculated utility values and are therefore deemed to be of greater importance. The part-worths and relative importance of the attributes that are based on these for the total sample ($n$ = 368) are summarised in Table 2. Separate relative importance tables were then calculated for each of the demographic groups of employees. The results indicated a relatively consistent preference across all groups with respect to the ideal total rewards mix. Table 3 provides a summary of the ranked attributes per demographic group.

The conjoint task produced an ideal mix of total rewards, of which three reward elements were consistently classified as highly valued and important in the retention of employees. These were: Benefits, Performance and recognition, and Remuneration, respectively. Benefits were considered twice as important as Remuneration in deriving utility scores and preferences within the overall sample, as well as in all the demographic groups (Benefits = 35%, Remuneration = 17%). The highest level of Benefits, namely a 100% employer contribution towards retirement funding, and the highest level of medical cover, were deemed most important in the retention of employees. These findings are consistent with the results of the WorldatWork Attraction and Retention survey (2007), whereby 90% of participants rated medical aid as having a moderate to high impact on retention.

Variations of the relative importance of attributes can be noted across demographic groups. Results for gender indicate that Benefits were considered to be important in retention for both men and women; however, the relative importance was greater for men (37.1%) than for women (33.7%), while Performance and recognition was deemed slightly more important for women (21.0%) than for men (18.6%).

Few differences were noted across different generation and race groups with all three groups indicating a preference for benefits, while Generation Y assigned a slightly lower level of importance to Remuneration (15%) versus Generation X (17%) and Baby Boomers (18%). Generation Y also specified Work–life balance as being slightly more important (12%) in their retention compared to Generation X (8%) and Baby Boomers (7%).

TABLE 3: Ranked attributes per demographic group based on choice-based conjoint tasks.

| Ranking | Overall | Male | Female | Black | White | Gen Y | Gen X | Baby Boomers | Non-management | Middle management | Senior management/ executives | Matric | Under graduate | Post-grad |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits | Benefits |
| 2 | Perf & Recog† | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog | Perf & Recog |
| 3 | Rem‡ | Rem | Rem | Rem | Rem | Rem | Rem | Rem | Rem | Rem | Rem | Rem | Rem | Rem |
| 4 | Career advance§ | Career advance | Career advance | Career advance | Career advance | Work–life balance | Career advance | Career advance | Career advance | Career advance | Learning | Work–life balance | Learning | Learning |
| 5 | Learning | Learning | Learning | Learning | Learning | Learning | Learning | Learning | Work–life balance | Work–life balance | Career advance | Career advance | Career advance | Career advance |
| 6 | Work–life balance | Work–life balance | Work–life balance | Work–life balance | Work–life balance | Career advance | Work–life balance | Work–life balance | Learning | Work–life balance | Work–life balance | Learning | Work–life balance | Work–life balance |

†, Performance and Recognition; ‡, Remuneration; §, Career Advancement.

# Discussion

The two main research objectives, firstly to develop a better understanding of the total reward preferences within a South African business context and secondly to identify the ideal or most desirable mix of total reward elements or total reward packages that would specifically retain employees from various demographic groupings, were investigated using both the conventional method of using a reward preference survey responded to on a Likert-type response scale as well as choice-based conjoint analysis (choice-based modelling). The latter method, which is novel in this field of the study more closely replicates real-life decision making in that individuals cannot obtain everything that they desire and have to psychologically make trade-offs between various combinations, unlike typical survey approaches where items are considered one at a time.

The results of the choice-based conjoint analysis revealed that all respondents considered financial rewards (Benefits, Performance and recognition, Remuneration, Career, respectively) as the most important component in their total rewards package that would lead to their retention. For most demographic groups, the remaining three places (ranked) were Career Advancement, Learning and Work–life balance. Work–life balance was found to be more important for Generation Y than career advancement. For those employees with only a matric qualification and those in non-managerial positions, access to learning opportunities were the least important in their retention.

Previous studies of total rewards that retain black employees in South Africa are limited. Benefits were consistently found to be the most important reward element in retention. Given the high cost of benefits such as medical aid, these are very important factors in retention, especially in South Africa, where a large portion of the population does not have access to benefits and public healthcare and social welfare pensions are inadequate. This sentiment was noted in a study carried out by Kochanski and Ledford (2001).

Baby Boomers, as the oldest generation and nearing retirement, valued retirement benefits, medical aid and base pay (Bussin, 2012; Tiku, 2007; Wallace, 2006). The current study corroborated these findings, as the highest level of benefits were the most valued reward element in the total rewards mix, followed by performance and recognition and remuneration. In South Africa, employees aged 50 and above are also likely to be the first generation who will be retiring out of a defined contribution plan as opposed to previous generations who received a pension from a defined benefit plan. Such arrangements have shifted the responsibility of retirement funding to the employee and subsequently heightened the awareness that employees have around the adequacy of their retirement funding.

Generation X is retained by financial rewards such as base salary, medical aid and deferred compensation (Bussin, 2012). The current study supports these findings, as the highest level of benefits, performance, recognition and remuneration were

deemed to be the most attractive elements in the reward mix and the most effective in the retention of these employees. Possible reasons for Generation X favouring these rewards could be attributed to this group's family focus, as they are likely to have young dependants for whom provision must be made in respect of medical aid. The current study further corroborates the findings of the Towers Perrin (2003) survey where base salary and variable pay were identified as factors that retained Generation Y employees (Bussin, 2012). Within the current study, performance and recognition (i.e. short-term incentives linked to your performance plus stock options or shares) and remuneration (i.e. base salary targeting the upper end of the market) were deemed important in Generation Y's retention. Unlike Baby Boomers and Generation X however, Generation Y selected the second level of the remuneration reward element which was comparatively lower than the first level selected by Baby Boomers and Generation X.

Benefits seem to retain Generation Y employees in the United States (Willmer, 2008). The current study supports these findings. The reason for this preference may be similar to that of the Generation Y employees in the United States who grew up in an environment where the U.S. healthcare system delivered fewer services at higher costs (Willmer, 2008). In South Africa, Generation Y employees are also likely to have been exposed to an inadequate public healthcare system and ever increasing health costs. Furthermore, the parents of Generation Y employees may have made inadequate provision for their retirement and not received a reasonable pension or, in some cases, received no pension and were dependent on social welfare. Such experiences may have heightened Generation Y employees' awareness of the need to make adequate provision for their retirement, and for this reason, they may have an appreciation for the value of a company's contribution to benefits such as retirement funding and medical care.

For most demographic groups, the remaining three places (ranked) were Career advancement, Learning and Work–life balance. Work–life balance was found to be more important for Generation Y than career advancement. For those employees with only a matric qualification and those in non-managerial positions, access to learning opportunities was the least important in their retention. Other studies indicated that career advancement and opportunities formed a strong retention factor for all employee categories (Booysen, 2007; Khanyile & Mapongo, 2007). Career advancement opportunities as well as work–life balance practices were noted in the literature as significant factors in the retention of female employees. Turnover among women was often related to salary inequities (Krishnan, 2009; McMullen, 2010; Sicherman, 1996; Stroh, Brett & Reilley, 1996). Another study indicated that talent development and the prospects of better pay served as retention factors for women (Kotze & Roodt, 2005). Findings from the current study partially support those of Sicherman (1996) and Kotze and Roodt (2005), as the highest levels of financial rewards, that is, Benefits, Remuneration, and Performance and recognition were all valued by women as part of their total rewards mix.

The findings of the current study did not support previous research, which indicated that Generation X employees value work–life balances as a retention tool (Gabriel, 1999; Gursoy et al., 2008). The lowest level of work–life balance was selected by Generation X employees, while a greater level of importance was placed on career advancement and learning in determining the ideal total rewards mix. This could be because of the different method employed here, one where reward elements needed to be traded-off with one another. Generation Y employees on the other hand assigned more importance to non-financial factors such as Work–life balance in their total rewards mix. Work–life balance was deemed more attractive than career advancement in Generation Y's total rewards mix. This finding is supported by that of the 2005 South African Graduate Recruitment Association survey, which indicated that the youngest generation, namely Generation Y, was retained by career advancement opportunities, challenging assignments and work–life balance. Generation Y employees were retained by organisations that allowed them to be loyal to their lifestyle rather than their jobs (Roy, 2008; Ruch, 2000).

## Limitations and directions for future research

The main limitation of this study is the issue of confounding variables. In particular, this refers to the current economic environment and associated factors, such as job stability. These factors are likely to have had a moderating effect on the results, as employees will elect rewards that meet basic physical and safety needs above esteem needs or self-actualisation needs (Robbins, Odendaal & Roodt, 2001). The results may have been further influenced by the effects of the economic recession, as one of the organisations from which the largest proportion of the sample was drawn was undergoing an extensive retrenchment exercise at the time.

It is recommended that further research be conducted during a period of greater economic stability, as it is likely to produce different responses. Additional relevant factors were not taken into account. Future research might thus want to examine whether personality variables affect the relationship between rewards and employees' decisions to stay at the organisation.

## Conclusion

The research confirms that rewards are important in every employment relationship. Offering customised reward packages that are fair, reasonable and regular can be an aid in the retention of talented employees. The overall ideal total reward mix includes financial and non-financial rewards when offered to employees in a manner that is reliable with preferences to gender, race and age cohorts. The results from the study can be used to guide the employer's reward strategy in their approaches of engaging or retaining their key employees.

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## Competing interests

## Authors' contributions

The study was conducted by M.P. as part of her Masters in Organisational Psychology research project at the University of Cape Town. A.F.S. was supervisor for M.P. and M.H.R.B edited the work for publication.

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# The relationship between readiness to change and work engagement: A case study in an accounting firm undergoing change

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**Orientation:** Readiness to change is a critical element for the successful implementation of organisational change. Work engagement ensures that employees are committed to the organisations' goals and is an important driver for organisational success. It is important that organisations sustain work engagement during organisational changes.

**Research purpose:** To investigate the relationship between readiness to change and work engagement within an accounting firm.

**Motivation for the study:** A change process can only be implemented successfully if there is a level of readiness to change. When readiness exists, resistance to change is reduced. Engaged employees remain enthusiastic about their organisation and choose to remain with the organisation. Change agents need to consider work engagement as an integral part of the change process, that is, before, during and after change has taken place. Work engagement and readiness to change are important elements for successful organisational change.

**Research design, approach and method:** A cross-sectional survey design was utilised to collect the data. A convenience sample of employees and top management from the accounting firm ($n$ = 340) were included. Cronbach's alpha coefficients, Pearson's product-moment correlations, analysis of variance (ANOVA), Scheffé tests, confirmatory factor analysis and structural equation modelling were used to analyse the data.

**Main findings:** Results indicated a practical and statistically significant relationship between readiness to change and work engagement. High levels of work engagement will generate high levels of readiness to change. Further to this, readiness to change is influenced by employees' work engagement and an organisation's change processes.

**Practical or managerial implications:** An employee's work engagement and an organisation's processes of change influence an employee's readiness to change. Therefore, organisations need to sustain work engagement and improve change processes.

**Contribution:** The contribution of this study is that it has provided new insights into the relationships between readiness to change and work engagement in a South African context.

## Introduction

### Purpose

In times when change is the rule rather than the exception, the ability of organisations to be flexible has become paramount (Bouckenooghe, De Vos & Van den Broeck, 2009). Readiness to change is essential for a change to be implemented successfully (Bouckenooghe et al., 2009). When readiness exists, the organisation is primed to embrace change and resistance could be reduced. When the converse is true, the change may be rejected. Work engagement is viewed as a workplace approach designed to ensure that employees are committed to the organisation's goals and values, motivated to contribute to organisational success and simultaneously to enhance their own sense of well-being (McLeod & Clark, 2009). Mangundjaya (2012) believes that high work engagement encourages readiness to change. With this in mind, the purpose of this study is to determine the relationship between readiness to change and work engagement.

### Literature review

Readiness to change is a critical element for the successful implementation of organisational change (Weiner, 2009), and work engagement is an important driver for organisational success (Lockwood, 2007). It is important that organisations sustain work engagement during

organisational changes. Both readiness to change and work engagement are important aspects of a successful organisation. An introduction to the literature review will be discussed in the following section and should provide a better understanding regarding the concepts under scrutiny.

## Conceptual literature

### Readiness to change

Readiness to change takes its roots in early research on organisational change (Walinga, 2008). The greatest challenge lies with the common assumption in organisational change literature that employees need to 'be made ready' for organisational change (Armenakis & Harris, 2002). Walinga (2008) explains that facilitating employee readiness to change entails exploring how leaders can 'get ready' to 'get employees ready' for change. Readiness to change emerged as one of the core attitudes affecting success and failure of change interventions (Zayim, 2010). According to Weiner (2009), it involves employees' beliefs in their potential and efficacy for the change efforts.

Readiness to change is conceived as a multifaceted concept that comprises an emotional dimension, a cognitive dimension and an intentional dimension of change (Bouckenooghe et al., 2009). Intentional readiness to change refers to the extent to which employees are willing to put their energy into the change process (Oreg, 2003). Cognitive readiness to change refers to the beliefs and thoughts that people hold about change (Oreg, 2003). According to Bouckenooghe and De Vos (2007), the cognitive component refers to what people think about change. Emotional readiness to change refers to the affective reactions towards change (Oreg, 2003). Resistance is associated with fear of the unknown. Therefore, emotional readiness is fuelled by cognitive readiness. It is believed that intentional, cognitive and emotional reactions towards change transpire at different stages in the change process and do not necessarily coincide (Bouckenooghe et al., 2009). Although this three-dimensional framework is useful in handling different aspects of change-related attitudes of individuals, they are also dependent on each other in the way that feelings regarding change are generally associated with the thoughts and behavioural intentions about the change (Oreg, 2003). As a result, in this study, this three-dimensional framework was adopted and investigated to better comprehend readiness to change.

### Work engagement

Work engagement is defined as 'a positive, fulfilling, work-related state of mind that is characterised by vigour, dedication and absorption' (Schaufeli, Salanova, Gonzalez-Romá & Bakker, 2002, p. 74). Vigour is portrayed by high levels of energy, mental resilience, willingness to invest effort, as well as persistence (Schaufeli et al., 2002). Vigour helps individuals to be more sensitive to opportunities at work and fosters a more proactive work style (Brummelhuis & Bakker, 2012). Dedication is characterised by 'a sense of significance, enthusiasm, inspiration, pride, and challenge'

(Schaufeli et al., 2002, p. 74). Dedication is specified by enthusiasm, inspiration and pride (Bakker, 2011; Kassing, Piemonte, Goman & Mitchell, 2012). Absorption is depicted as being engrossed in one's work, to the extent that time passes quickly and it is difficult to detach oneself from work (Schaufeli et al., 2002). Absorption entails full concentration and being highly and happily engrossed in one's work (Bakker, 2011; Kassing et al., 2012). Work engagement is a key business driver for organisational success where high levels of engagement promote retention of talent, foster customer loyalty and improve organisational performance and stakeholder value (Lockwood, 2007). Engaged employees typically remain enthusiastic about their organisation and choose to remain with the organisation (Lockwood, 2007). Further to this, employee engagement continues to be an important predictor of organisational performance even in a challenging economy (Gallup, 2013). Work engagement is influenced by many factors ranging from workplace culture, organisational communication and managerial styles to trust, respect, leadership and company reputation (Lockwood, 2007). Organisational changes that result from mergers, acquisitions, downsizing and restructuring lead to increased pressure on employees to work longer hours, take on greater responsibility and become more resistant towards continuous change and ambiguity (Burnes, 2005). The problem is exaggerated when change agents, usually management, do not include employees in the adaptation process and fail to manage the change process adequately. This mismanagement impacts negatively on organisational effectiveness and employee well-being, resulting in the employee becoming disengaged in their work and the organisation (Marks, 2007).

According to Bhola (2010), sustaining engagement throughout organisational change can make a significant difference in retaining employees and increasing performance. Change agents must consider work engagement as an integral part of the change process, that is, before, during and after change has taken place (Bhola, 2010) to ensure that the change process is successful. Further to this, the state of the global workplace report presented by Gallup indicated that employees who are engaged in their work are less likely to be thrown off course by organisational changes (Gallup, 2013). Increasing the number of engaged employees and managers driving organisational change initiatives will boost their likelihood of success (Gallup, 2013).

### Trust in leadership

Because change involves deviation and a certain amount of risk-taking, employees would most likely avoid change behaviours unless they operated in a situation in which they felt secure (Tierney, 1999). Therefore, the presence of a high level of trust amongst employees represents another necessary condition for change attempts and acceptance. In organisations where trust in top management exists, and where change projects have been implemented successfully in the past, organisational members are more likely to develop positive attitudes towards new changes (Bouckenooghe et al., 2009).

Gallup's assessment of many South African workplaces found that trust and transparent communication for organisational leaders are essential for talent management, which includes effective management of change initiatives amongst other talent management practices; therefore, organisational leaders should not overlook their impact (Gallup, 2013).

Trust in the organisation, colleagues and the leader is an antecedent of work engagement, indicating how important it is to foster an open, dependable relationship in the workplace (Bargagliotti, 2011). Further to this, when leaders display transformational leadership behaviours, it leads to higher levels of work engagement (Salanova, Lorente, Chambel & Martinez, 2011). The relationship between trust and work engagement is mutually reinforcing and leads to an upward spiral effect (Hassan & Ahamed, 2011). Further to this, results from a study conducted by Zayim (2010) indicated that perceived trust in colleagues, leadership and clients is correlated with perceived organisational trust and contributed significantly in readiness to change.

## Process of change

The process dimensions of organisational change should involve change models, proposed for effective change implementation, and elements that contribute to the positive outcomes of the change efforts (Bouckenooghe et al., 2009). Process factors of change, specifically within this study, have a temporary nature and refer to the actual approach of implementing the change (Bouckenooghe et al., 2009). Open communication, knowledge sharing and participation are some factors that could facilitate successful change practices (Marks, 2007). Failure to do so can result in employees becoming disengaged at work (Marks, 2007). Readiness to change is also affected by the track record of an organisation in dealing effectively with change, which highlights the importance of such agents managing the change process effectively (Bouckenooghe et al., 2009).

## Relationships between the constructs in the study

The motivation for this study was based on the notion that organisations need to determine the employee readiness for change before embarking on change processes, as this could possibly lead to the success or failure of planned change. A further motivation was to explore the relationship between readiness to change, work engagement, process of change and trust in leadership during a change process within an accounting firm.

A study conducted by Mangundjaya (2012) in four financial companies that consist of three private-owned banks and one government-owned financial company ($N = 502$) indicated that both organisational commitment and work engagement have a positive correlation with individual readiness to change. Mangundjaya (2012) believes that the higher the work engagement, the higher the readiness to change will be. Hung, Wong, Anderson and Hereford (2013) conducted a study amongst 706 physicians and staff in 19 primary health care

departments to measure readiness to change and to determine the role of work engagement, ownership and participation in managing change. This study identified that non-physicians who reported high levels of work engagement and ownership also appeared to be ready for change (Hung et al., 2013). Further studies highlight that there is a relationship between readiness and processes of change (Jimmieson, Peach & White, 2008; McKay, Kuntz & Näswall, 2013; Ranta, 2011).

In a study conducted by Zayim (2010), in the education sector involving 603 teachers working at primary and secondary level public schools, identified that readiness to change and perceived organisational trust were significantly correlated with each other in a way that intentional-, emotional- and cognitive readiness were all associated and contributed significantly to perceived organisational trust. The results showed that perceived trust in colleagues, leadership and clients is correlated with perceived organisational trust and contributed significantly to readiness to change (Zayim, 2010). Myungweon (2011) also suggested certain aspects of leadership are shown to influence readiness to change. These include employees' trust in executive management, effective leadership practices and the quality of employee–manager relationships.

According to Bargagliotti (2011), trust in leadership is an antecedent of work engagement. When leaders display transformational leadership behaviours, it leads to higher levels of work engagement (Salanova et al., 2011). In a study conducted by Mahembe and Engelbrecht (2014), within the South African school system ($N = 288$), it was suggested that there is a positive relationship between trust in the leader and work engagement. Bargagliotti (2011) concluded that trust in the leader is an antecedent of work engagement. Organisational climate, such as trust in leadership, is important for establishing a positive attitude towards change. There is a limitation of available data from South Africa; therefore, this study will provide new insights into the relationships between the constructs measured in this study from a South African context. The next section will discuss the proposed model and hypotheses for this study.

## Proposed model

A model for this study was constructed based on the questionnaires utilised, as well as the literature review. This model is illustrated in Figure 1.

As identified by Bouckenooghe et al. (2009), climate of change and process of change were uncovered as antecedents of readiness to change. Figure 1 illustrates that the arrows are flowing from process of change to the sub-constructs which implies that process of change will be measured by (1) participation, (2) support by supervisors, (3) attitude of top management and (4) quality of change communication. Climate of change is measured by trust in leadership, cohesion and politicking. However, this study will only focus on the trust in leadership component for which the reasons will be discussed in the research method section. Figure 1 shows that the arrows are flowing from process of change
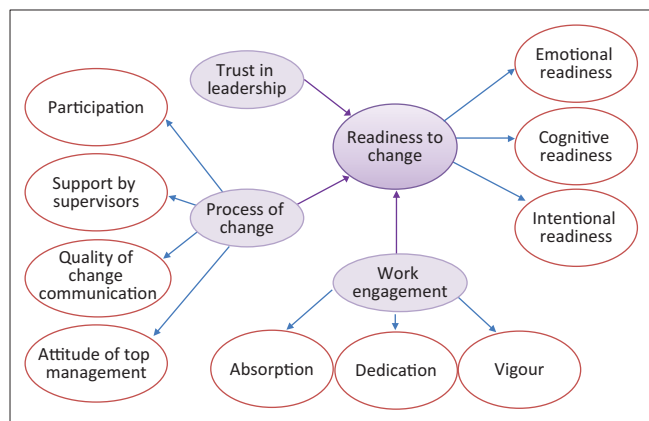
**FIGURE 1:** Proposed model of the relationships between work engagement, readiness to change, process of change and trust in leadership.

**TABLE 1:** Demographic variables of the sample.

| Demographic variables | Frequency | Percentage |
|---|---|---|
| **Gender** | | |
| Male | 144 | 42 |
| Female | 196 | 58 |
| **Language** | | |
| English | 189 | 56 |
| Afrikaans | 116 | 34 |
| Xhosa | 15 | 4 |
| Other African | 20 | 6 |
| **Job category** | | |
| Top management | 51 | 15 |
| Middle management | 120 | 35 |
| Trainee accountant | 88 | 26 |
| Administration | 76 | 22 |
| Other | 5 | 1 |
| **Race** | | |
| White | 204 | 60 |
| African | 42 | 12 |
| Mixed race | 57 | 17 |
| Indian | 37 | 11 |
| **Office** | | |
| Kimberley | 7 | 2 |
| Pretoria | 42 | 12 |
| Kathu | 3 | 1 |
| Paarl | 6 | 2 |
| Plettenberg Bay | 3 | 1 |
| George | 17 | 5 |
| East London | 18 | 5 |
| Bloemfontein | 14 | 4 |
| Port Elizabeth | 60 | 18 |
| Johannesburg | 53 | 16 |
| Durban | 21 | 6 |
| Cape Town | 95 | 28 |
| **Age** | | |
| 20–29 | 165 | 49 |
| 30–39 | 92 | 27 |
| 40–49 | 43 | 13 |
| 50–59 | 39 | 11 |

$n = 340$.

and trust in leadership towards readiness to change. The researcher anticipates that the outcome of this study will possibly reveal a relationship between process of change and readiness to change, as well as a relationship between trust in leadership and readiness to change.

As work engagement is an important part in the change process, it could possibly have an influence on readiness to change, and for this reason, it was included in the proposed model. This is indicated in Figure 1 and is illustrated by the arrows flowing from work engagement towards the readiness to change construct. Work engagement is measured in the model by vigour, dedication and absorption. Therefore, the arrows are flowing from work engagement to the three sub-constructs as can be seen in Figure 1.

The level of readiness to change is measured through the respondents' emotional-, cognitive- and intentional readiness to change. Therefore, the arrows are flowing from readiness to change towards the sub-constructs. The relationships anticipated within the proposed model will be tested and discussed in the 'Results' section.

From the literature and the proposed model, the following hypotheses were set:

- **H1-1:** There is a significant relationship between readiness to change and work engagement.
- **H1-2:** There is a significant relationship between readiness to change and process of change.
- **H1-3:** There is a significant relationship between readiness to change and trust in leadership.
- **H1-4:** There is a significant relationship between work engagement and process of change.
- **H1-5:** There is a significant relationship between work engagement and trust in leadership.
- **H1-6:** There is a relationship between process of change and trust in leadership.

# Method

A descriptive research design utilising a quantitative research method was used to pursue the aim of this study. The accounting firm under scrutiny endured an integration process with an international accounting firm in 2008 introducing numerous changes which to date continues to take place. The aim for the accounting firm was to become fully integrated in a national and international capacity which implied that all the offices across South Africa would implement similar business policies, procedures and strategies and would be viewed as one practice. The mid-tier accounting firm under scrutiny has 12 offices across South Africa.

## Participants

The population consisted of employees and top management within the accounting firm and was estimated at approximately 990. All employees within the accounting firm were sent an electronic survey to complete and a total of 340 responses were received, indicating a response rate of 34%. The demographics of the sample are presented in Table 1.

## Measuring instrument

A combined questionnaire, incorporating two measuring instruments, was utilised to gather the data for the purpose

of this study. These instruments are the Organisational Change Questionnaire – Climate of Change, Process and Readiness (OCQ-C, P, R) as well as the Utrecht's Work Engagement Scale (UWES).

The OCQ-C, P, R, developed by Bouckenooghe et al. (2009), is a psychometrically sound diagnostic instrument that incorporates three separate questionnaires aimed at measuring the following: (1) the climate of change or internal change context (C), (2) the process of change (P) and (3) readiness to change (R). This instrument was designed to measure the circumstances under which change embarks (i.e. climate of change or internal context), the way a specific change is implemented (i.e. process) and the level of readiness at the individual level.

The instrument encompasses the following 10 dimensions: (1) quality of change communication, (2) participation, (3) attitude of top management, (4) support by supervisors, (5) trust in leadership, (6) cohesion, (7) politicking, (8) emotional readiness to change, (9) cognitive readiness to change and (10) intentional readiness to change (Bouckenooghe et al., 2009).

As mentioned before, the researcher only included the sub-construct of trust in leadership from the climate of change dimension in this study's questionnaire. Trust in leadership will be used as one of the main constructs instead of a sub-construct that measures climate of change. Politicking and cohesion were not deemed as essential components to measure by the researcher within this study. This notion was supported by the accounting firm under scrutiny. These sub-constructs could be included in future research.

Quality of change communication, participation, attitude of top management towards organisational change and support by supervisors all pertain to the process of how change is dealt with. Readiness to change was measured by emotional, cognitive and intentional readiness. Bouckenooghe et al. (2009) found that there is adequate content validity and reliability. Further to this, Bouckenooghe et al. (2009) suggested that different sections of the questionnaire could be used independently, as the scales showed adequate reliability and validity. Permission to utilise this instrument for research purposes was obtained from the developers or publishers of the scale. Respondents were asked to indicate their level of agreement with the items by using a 5-point Likert-type scale ranging from 1 (strongly disagree) to 5 (strongly agree).

Table 2 illustrates the reliability coefficients for process of change, climate of change and readiness to change. The reliability of these constructs was determined by utilising Cronbach's alpha reliability measure (Bouckenooghe et al., 2009).

From Table 2, it is evident that all sub-constructs for this questionnaire demonstrate adequate reliability which suggests that there is internal consistency (Bouckenooghe et al., 2009).

**TABLE 2:** Cronbach's alpha coefficients for Organisational Change Questionnaire – Climate of change, process and readiness.

| Construct | Alpha |
|---|---|
| **Process of change** | |
| Quality of change communication | 0.88 |
| Support by supervisors | 0.82 |
| Participation | 0.79 |
| Attitude of top management | 0.73 |
| **Climate of change** | |
| Trust in leadership | 0.79 |
| Cohesion | 0.74 |
| Politicking | 0.68 |
| **Readiness to change** | |
| Emotional readiness | 0.70 |
| Intentional readiness | 0.89 |
| Cognitive readiness | 0.69 |

*Source*: Bouckenooghe, D., De Vos, G., & Van den Broeck, H. (2009). Organizational Change Questionnaire – Climate of change, processes, and readiness: Development of a new instrument. *The Journal of Psychology, 143*(6), 559–599. https://doi.org/10.1080/00223980903218216

This study utilised the UWES to measure the work engagement of respondents. The UWES includes the three constituting aspects of work engagement: vigour, dedication and absorption. According to Schaufeli, Bakker and Salanova (2006), the UWES can be used as an impartial instrument to measure work engagement because its equivalence is acceptable for different racial groups. Furthermore, confirmatory factor analyses have supported the three-dimensional structure of the UWES, and it identifies that the dimensions are very closely related (Schaufeli et al., 2006). Psychometric evaluations also illustrated satisfactory validity and reliability of the UWES (Schaufeli & Bakker, 2003). The internal consistency of the UWES is respectable and displays Cronbach's alphas ranging from 0.80 to 0.90 in a number of studies (Schaufeli & Bakker, 2004; Schaufeli, Taris & Van Rhenen, 2003; Schaufeli et al., 2002). In most cases, the 3-factor structure has been validated for the South African context (Rothmann & Jordaan, 2006).

## Data collection

It was also important to ensure that the respondents understood the items stated within the questionnaire. The pilot study was successful and all concerns were ironed out before the questionnaire was administered.

## Data analysis

MS Excel applications and Statistica version 12 were applied to analyse the descriptive statistics and inferential statistics. Descriptive statistics comprised frequency distributions and measures of central tendency. Inferential statistics comprised the Pearson's product-moment correlation and multiple regression analysis. Descriptive statistics were utilised to describe the distribution of scores for readiness to change, work engagement, trust in leadership and process of change. Cronbach's alpha coefficients were calculated for each of the constructs and sub-constructs. AMOS version 23 was utilised to conduct the confirmatory factor analysis (CFA) and structure equation modelling (SEM). Table 3 summarises the reliability coefficients of overall work engagement, process of change, trust in leadership and readiness to change

constructs. The results imply that all constructs and sub-constructs utilised in the questionnaire demonstrate adequate reliability, suggesting that there is internal consistency.

For the purpose of this study, the measurement model was investigated through applying CFA. The results from CFA suggested that there was a good model fit with the data.

## Ethical considerations

Before data collection could commence, the researcher had to obtain the necessary permission from the Board of Partners and also ethics approval from Nelson Mandela Metropolitan University's ethics committee. Before the researcher could administer the questionnaire, it was essential to conduct a pilot study to ensure that the link to the questionnaire was accessible from the organisation's website.

## Results

To gain a better understanding of the results, the researcher presented the outcomes from the questionnaire to illustrate levels of work engagement, process of change, trust in leadership and readiness to change.

**TABLE 3:** Cronbach's alpha coefficients for the factors.

| Construct | Sub-construct | Alpha |
|---|---|---|
| Readiness to change | Emotional readiness | 0.72 |
| | Cognitive readiness | 0.74 |
| | Intentional readiness | 0.92 |
| | **Total** | **0.74** |
| Process of change | Quality of change communication | 0.94 |
| | Participation | 0.90 |
| | Attitude of top management | 0.91 |
| | Support by supervisors | 0.83 |
| | **Total** | **0.86** |
| Work engagement | Absorption | 0.78 |
| | Dedication | 0.87 |
| | Vigour | 0.84 |
| | **Total** | **0.80** |
| Trust in leadership | - | 0.61 |

$n = 340$.

From Table 4, it is apparent that there are high levels of absorption, dedication and vigour within the sample. Further to this, the sample displays high levels of work engagement. Quality of change communication and participation presented medium scores. Attitude of top management and support by supervisors presented high scores. The sample has a medium score with regard to process of change. The trust in leadership construct revealed a medium score. The sample displayed high levels of emotional-, cognitive- and intentional readiness to change. Further to this, the sample possesses high levels of readiness to change.

## Relationship between the constructs

Table 5 reflects the correlations between scores on readiness to change and work engagement constructs and their respective sub-constructs based on the results of Pearson's product-moment correlation calculation.

From Table 5, it is apparent that there is practically and statistically significant relationship between overall readiness to change and work engagement ($r = 0.452$). Regarding relationships between the sub-constructs of readiness to change and the sub-constructs of work engagement, Table 5 indicates that there is a practically and statistically significant relationship between emotional readiness and vigour ($r = 0.370$), intentional readiness and absorption ($r = 0.28$), intentional readiness and dedication ($r = 0.407$) as well as intentional readiness and vigour ($r = 0.461$). Table 5 also indicates that cognitive readiness has a statistical relationship with dedication ($r = 0.263$) and vigour ($r = 0.260$). Absorption's correlation with emotional readiness ($r = 0.178$) and cognitive readiness ($r = 0.069$) is relatively small.

From Table 6, there is a correlation of 0.482 between readiness to change and process of change, indicating a practically and statistically significance between the constructs. Readiness to change displays practical and statistical significance with all the sub-constructs for process of change. Process of change also displays practical and statistical significance with the sub-constructs for readiness to change.

**TABLE 4:** Descriptive statistics for work engagement, process of change, trust in leadership and readiness to change.

| Construct | Mean | Medium | Min. | Max. | Std. Dev. | Skewness | Kurtosis |
|---|---|---|---|---|---|---|---|
| Absorption | 3.65 | 3.67 | 1.17 | 5.00 | 0.62 | -0.303 | 0.110 |
| Dedication | 3.74 | 3.80 | 1.00 | 5.00 | 0.74 | -0.459 | 0.253 |
| Vigour | 3.46 | 3.50 | 1.00 | 5.00 | 0.66 | -0.334 | 0.114 |
| Work engagement | 3.62 | 3.64 | 1.06 | 5.00 | 0.57 | -0.494 | 0.771 |
| Quality of change communication | 2.85 | 3.00 | 1.00 | 5.00 | 0.94 | -0.016 | -0.498 |
| Participation | 2.87 | 3.00 | 1.09 | 4.82 | 0.73 | -0.080 | -0.048 |
| Attitude of top management towards change | 3.41 | 3.33 | 1.00 | 5.00 | 0.94 | -0.259 | -0.204 |
| Support by supervisors | 3.42 | 3.43 | 1.00 | 5.00 | 0.78 | -0.191 | 0.131 |
| Process of change | 3.14 | 3.15 | 1.09 | 4.95 | 0.72 | -0.055 | -0.157 |
| Trust in leadership | 3.21 | 3.33 | 1.00 | 5.00 | 0.83 | -0.129 | -0.006 |
| Emotional readiness | 3.48 | 3.40 | 1.80 | 5.00 | 0.67 | 0.219 | -0.027 |
| Cognitive readiness | 3.40 | 3.40 | 1.40 | 5.00 | 0.65 | 0.116 | 0.348 |
| Intentional readiness | 3.72 | 3.67 | 1.00 | 5.00 | 0.75 | -0.126 | 0.184 |
| Readiness to change | 3.53 | 3.49 | 2.16 | 5.00 | 0.56 | 0.366 | -0.181 |

$n = 340$.

**TABLE 5:** Correlations between the constructs of readiness to change and work engagement.

| Constructs | Absorption | Dedication | Vigour | Work engagement |
|---|---|---|---|---|
| Emotional readiness | 0.178 | 0.281 | 0.370 | 0.329 |
| Cognitive readiness | 0.069 | 0.263 | 0.260 | 0.240 |
| Intentional readiness | 0.428 | 0.407 | 0.461 | 0.509 |
| Readiness to change | 0.289 | 0.397 | 0.455 | 0.452 |

**TABLE 6:** Correlations between the constructs of readiness to change and process of change.

| Constructs | Emotional readiness | Cognitive readiness | Intentional readiness | Readiness to change |
|---|---|---|---|---|
| Quality of change communication | 0.320 | 0.415 | 0.217 | 0.385 |
| Participation | 0.299 | 0.465 | 0.267 | 0.419 |
| Attitude of top management | 0.359 | 0.455 | 0.336 | 0.470 |
| Support by supervisors | 0.285 | 0.391 | 0.197 | 0.353 |
| Process of change | 0.376 | 0.508 | 0.302 | 0.482 |

**TABLE 7:** Correlations between the constructs of readiness to change and trust in leadership.

| Constructs | Emotional readiness | Cognitive readiness | Intentional readiness | Readiness to change |
|---|---|---|---|---|
| Trust in leadership | 0.340 | 0.492 | 0.311 | 0.465 |

**TABLE 8:** Correlations between the constructs of process to change and work engagement.

| Constructs | Absorption | Dedication | Vigour | Work engagement |
|---|---|---|---|---|
| Quality of change communication | 0.153 | 0.366 | 0.331 | 0.342 |
| Participation | 0.122 | 0.365 | 0.347 | 0.336 |
| Attitude of top management | 0.209 | 0.414 | 0.397 | 0.408 |
| Support by supervisors | 0.176 | 0.304 | 0.307 | 0.314 |
| Process of change | 0.196 | 0.427 | 0.408 | 0.414 |

**TABLE 9:** Correlations between the constructs of trust in leadership and work engagement.

| Constructs | Absorption | Dedication | Vigour | Work engagement |
|---|---|---|---|---|
| Trust in leadership | 0.132 | 0.384 | 0.351 | 0.350 |

**TABLE 10:** Correlations between the constructs of trust in leadership and process of change.

| Constructs | Trust in leadership |
|---|---|
| Quality of change communication | 0.586 |
| Participation | 0.644 |
| Attitude of top management | 0.632 |
| Support by supervisors | 0.671 |
| Process of change | 0.743 |

**TABLE 11:** Results for structural equation modelling for proposed model.

| Indices for single fit models | Recommended metrics | Results |
|---|---|---|
| Chi-square | ≤ 3.00 | 1.740 |
| Bentler–Bonnet Normed Fit Index (NFI) | ≥ 0.90 | 0.830 |
| Bentler Comparative Fit Index (CFI) | ≥ 0.90 | 0.920 |
| Joreskog Adjusted GFI (AGFI) | ≥ 0.95 | 0.760 |
| Root mean square approximation (RMSEA) | ≤ 0.08 | 0.047 |
| Akaike Information Criterion (AIC) | < better | 3448.443 |
| Brown–Crudeck Criterion (BCC) | < better | 3542.943 |

$n = 340$.

leadership demonstrates practical and statistical significance with dedication ($r = 0.384$), vigour ($r = 0.351$) and a lower significance, although still statistically significant, with absorption ($r = 0.132$).

As can be seen in Table 10, the correlation coefficient calculated for process of change and trust in leadership is 0.743, which implies that there is a positive relationship between the constructs.

Trust in leadership demonstrates practical and statistical significance with quality of change communication ($r = 0.586$), participation ($r = 0.644$), attitude of top management ($r = 0.632$) and support by supervisor ($r = 0.671$).

## Structural equation modelling analysis

Structural equation modelling analysis was utilised to evaluate the relationships amongst the set of variables used in the model proposed in this study. If the indices meet or exceed the metrics mentioned in Table 11, it will identify if there is an adequate data fit with the proposed model.

For comparing models, lower scores for Akaike Information Criterion (AIC) and Brown–Crudeck Criterion (BCC) are deemed more suitable (Hair, Black, Babin, Anderson & Tatham, 2006; Schreiber et al., 2006; D. Venter, pers. comm., July 01, 2015). The root mean square approximation (RMSEA) is 0.047 indicating a good model fit. The Bentler Comparative Fit Index (CFI) was 0.92 indicating a conservative model fit. The chi-square was 1.74 which is below 3.00 as recommended in Table 4.47. The Joreskog Adjusted GFI (AGFI) was 0.76 which illustrates a mediocre model fit. The Bonnet Normed Fit Index (NFI) was 0.83

Results, as presented in Table 7, reveal a positive relationship between readiness to change and trust in leadership ($r = 0.465$). Trust in leadership demonstrates practical and statistical significance with the sub-constructs of readiness to change.

From Table 8, there is a correlation of $r = 0.414$ between work engagement and process of change, indicating a practical and statistical significance between the constructs. Table 8 illustrates that all the sub-constructs from process of change display practically and statistically significant correlations with work engagement. A noticeable result observed from Table 8 is that all the sub-constructs from process of change possess lower correlations with absorption; however, these correlations are still considered as statistically significant as $r \geq 0.106$ (Gravetter & Wallnau, 2009).

Table 9 suggests that there is a positive relationship between work engagement and trust in leadership ($r = 0.350$). Trust in
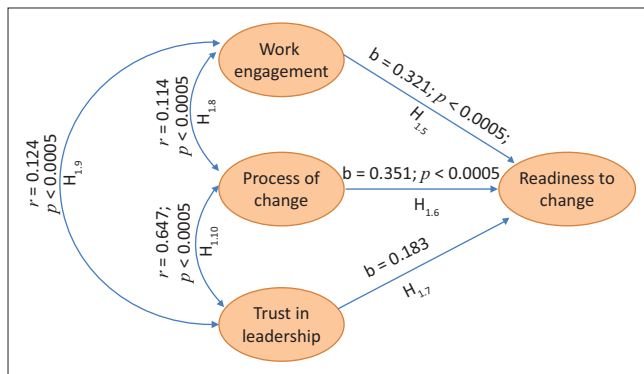
**FIGURE 2:** Structural equation modelling estimations ($n$ = 340).

which is below the recommended 0.90 indicated in Table 10, which is not seen as a good fit.

The AMOS package utilised within this study measured the estimated relationships between constructs in the proposed model. The purpose of Figure 2 is to illustrate the relationships between the constructs.

The single-headed arrows indicate dependency type relationship, and the double-headed blue arrows indicate a covariance. Figure 2 illustrates three dependency type relationships with readiness to change and three covariances amongst process of change, trust in leadership and work engagement. The regression weights and covariances are reported as estimates, because the AMOS programme estimates these values based on the sample data. All the estimates illustrated in Figure 2 are significant ($p < 0.05$), which implies causality because of the fact that SEM was utilised. The weight of the regression of trust in leadership on readiness to change does not display significance. Although a larger sample will most likely confirm that the trust in leadership on readiness to change regression weight is actually significant, the sample size of this study is viewed acceptable for exploratory purposes.

As illustrated in Figure 2, the single-headed arrows suggest that process of change and work engagement significantly influence readiness to change ($p < 0.0005$). The dual-headed arrows suggest that process of change and work engagement is significantly correlated ($p < 0.0005$), suggesting that employees with high levels of work engagement will perceive change processes positively. This is because engaged employees will be able to deal with job demands more effectively, specifically if change processes increase job demands. It further illustrates that process of change and trust in leadership are significantly correlated ($p < 0.0005$), suggesting that if trust in leadership exist, processes of change will be perceived more favourably. A correlation is also apparent between work engagement and trust in leadership ($p < 0.0005$), suggesting that work engagement could create enhanced trust in leadership and vice versa.

The results from SEM imply that the data support the hypotheses implied by the proposed model, as mentioned earlier and indicated in Figure 2, in that process of change and work engagement influence readiness to change. However, the relationship between trust in leadership and readiness to change is not statistically significant ($p > 0.05$).

## Discussion

### Questionnaire results

Respondents have high levels of work engagement, as can be seen in Table 4, suggesting that most of the respondents are energetic about their work, feel connected to their work and are better able to deal with job demands. Organisational changes that are a result of mergers, acquisitions, downsizing and restructuring lead to increased pressure on employees to work longer hours, take on greater responsibility and become more tolerable towards continuous change and ambiguity (Burnes, 2005) because of uncertainty and potential changes in the organisational culture. When employees are engaged, they are able to deal with job demands more effectively, particularly under circumstances of change.

The process of change results, as can be seen in Table 4, suggests that it is problematic, which may be because of the uncertainty with regard to processes around change implementation currently taking place in the accounting firm. When change agents fail to manage the process, it can lead to employees becoming disengaged in their work (Marks, 2007); however, this does not seem to be the case as engagement levels are high.

As seen in Table 4, trust in leadership appears to be low, which suggests that leadership may need to become more transparent with the activities surrounding change implementation. Although there are a percentage of respondents who perceive that trust in leadership exists, the overall score from this construct indicates that there is also room for improvement when it comes to trust in leadership for the accounting firm. It would possibly be easier for employees to go along an uncertain pathway of change when they trust their leaders who are guiding the change initiatives. Because change involves deviation and a certain amount of risk-taking, employees would most likely avoid change behaviours unless they operated in a situation in which they felt secure (Tierney, 1999). Therefore, trust in leadership during change processes is essential. In organisations where trust in top management exists, and where change projects have been implemented successfully in the past, organisational members are more likely to develop positive attitudes towards new changes (Bouckenooghe et al., 2009).

The results from this study suggest that the respondents within the mid-tier accounting firm have high levels of readiness to change, as seen in Table 4. This implies that they support and have positive attitudes towards change that occurs within the firm or their departments.

## Relationship between the constructs

This study found that there is a relationship between readiness to change and work engagement. The latter concurs with studies conducted by Mangundjaya (2012), Prasad (2014) and Hung et al. (2013) where it was revealed that work engagement is positively related with readiness to change. This suggests that employees who support change are generally energetic about their work, feel connected to their work and are better able to deal with job demands.

There is also a significant relationship between readiness to change and process of change. This suggests that when employees are prepared for change, they will perceive change processes positively within the organisation. According to Ranta (2011), change communication was found to be an important factor in facilitating readiness to change. Ranta (2011) explains that this finding has practical significance in that communication should be considered critical in facilitating readiness to change. In a study conducted by McKay et al. (2013), it was indicated that the perceived adequacy of change-related communication was associated with participants' readiness to change.

Furthermore, there is a significant relationship between readiness to change and trust in leadership. Employees who have trust in their leaders are more ready for change than those who do not have trust. This outcome is similar to findings from a study conducted by Zayim (2010) indicating that perceived trust in colleagues, leadership and clients are all correlated with perceived organisational trust and contributed significantly in readiness to change (Zayim, 2010). Further to this, Myungweon (2011) mentioned that certain aspects of leadership, such as employees' trust in executive management, effective leadership practices and the quality of employee and manager relationships, also influence readiness to change.

The correlation between work engagement and process of change implies that respondents who are energetic about their work, feel more connected to their work and are better able to deal with job demands (high on work engagement), will generally perceive processes of change in a positive light. According Changefirst (2013), one of the major influencing factors in work engagement is the degree to which people see the organisation successfully implementing change, in other words, the processes of change. Tvedt and Buvik (2009) revealed that a healthy organisational change process can assist in shaping engagement.

In addition to this, a significant relationship between work engagement and trust in leadership is present, suggesting that when employees trust leadership, they are more engaged. Hassan and Ahamed (2011) indicated that the relationship between trust and work engagement is mutually reinforcing and leads to an upward spiral effect. According to Dirks and Ferrin (2002), an increase in trust is a direct or indirect result of positive workplace behaviours and attitudes like organisational commitment and employees' work engagement.

According to this study, trust in leadership is significantly related to process of change and its sub-constructs, namely quality of change communication, participation, attitude of top management and support by supervisor. When trust in leadership exists, the processes of change will be received more positively. According to Caetano and Neves (2006), trust in leadership contributes to a successful change process. Employees who have trust in leadership typically perceive change processes in a positive light as they have faith in those making the changes. The relationship between trust and change is reciprocal (Caetano & Neves, 2006; Morgan & Zeffane, 2003). Good processes of change implementation could also improve trust in leadership.

To support the findings from Pearson's product-moment correlations, the proposed model was tested by way of SEM from which the results illustrate that work engagement and process of change influences readiness to change. This implies that employees who are engaged in their work will be less resistant towards change; thus, improving work engagement levels of employees will lead to them supporting change initiatives. Furthermore, adequate change processes will contribute in generating support for change processes amongst employees thereby reducing resistance to change.

The SEM results further reveal that process of change and work engagement are significantly correlated, suggesting that employees with high levels of work engagement will generally perceive change processes positively. This is because engaged employees will be able to deal with job demands more effectively, specifically if change processes increase job demands.

Process of change and trust in leadership are also significantly correlated as indicated from the SEM results. As mentioned before, this suggests that when processes of change are perceived positively, employees will generally have trust in leadership. Further to this, when there is trust in leadership employees will generally perceive the change processes more positively. The SEM results further reveal that there is a significant correlation between work engagement and trust in leadership which implies that work engagement will generally enhance trust in leadership and vice versa.

## Limitations

Time constraints and work pressures could have influenced the response rates, as respondents work in a time and fee-driven environment. In order to overcome this, an electronic questionnaire was utilised in order for respondents to complete the questionnaire at home or in their own time.

Trust in leadership was only measured by three items as referred to in the methodology section. The researcher was aware that this could possibly influence the results for this construct. However, the results from this construct were still considered to be valuable and introduced an area for

improvement within the accounting firm which can be potentially researched in the future.

## Recommendations for future research

It would be advisable to scrutinise the concept of trust in leadership as a lack of trust in leadership can be a consequence of ineffective communication within an organisation (Lamm, Gordon & Purser, 2010). This can be done by incorporating a larger trust scale into this study's questionnaire. Alternatively, trust in leadership could be measured as a separate construct. Another recommendation for future research would be to administer the research questionnaire utilised within this study before and after a change initiative takes place, so as to determine if the change process influenced work engagement or to assess the employees' level of readiness to change. The SEM results indicated a mediocre model fit with the data; therefore, it would be beneficial to attempt on improving the model fit. Potentially testing this model with other samples and in other industries may be beneficial.

## Conclusion and contribution of this study

By understanding the relationships between readiness to change and work engagement, the mid-tier accounting firm will receive valuable information on how the integration and change processes impact employees and top management within the organisation. These findings further provide direction on how to approach future integration and change procedures. From the results of this study, it was implied that high levels of work engagement will generate high levels of readiness to change. Engaged employees are better able to cope with job demands during change processes which ultimately will impact whether change implementation is successful.

In conclusion, an employee's work engagement and an organisation's processes of change, such as quality of change communication, participation during change, attitude of top management towards change, support by supervisors and trust in leadership, influence the employees' readiness to change. Therefore, the latter elements are crucial for successful change implementation within an organisation.

# Acknowledgements

## Competing interests

## Authors' contributions

This article is based on M.M.'s degree of Doctor of Philosophy in Industrial Psychology from the Nelson Mandela Metropolitan University, South Campus. C.H. was the supervisor of the project and acted as the corresponding author.

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# A reflection on the relationship between performance management and training in the South African public service

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**Orientation:** Performance management plays a pivotal role in the realisation of many facets of public administration, including service delivery, good governance and organisational productivity through setting of performance targets and regular assessments of performance. In search of improved quality and productivity in the public service, the South African government introduced several legislative and policy interventions, including but not limited to the *Public Service Act*, 1994 (Proclamation 103 of 1994), *Public Service Regulations* of 2001 and the *White Paper on Transforming Public Service Delivery* of 1997.

**Research purpose:** The main thrust of this conceptual paper was to explore the relationship between performance management and training in the South African public service.

**Motivation for the study:** The lack of sufficient literature on the relationship between performance management and training. To also prove that the two are inseparably linked, meaning that one cannot exist without the other.

**Research design, approach and method:** This article, which is conceptual in nature, reviewed existing literature on performance management and training in the public service extensively so as to arrive at a definitive conclusion.

**Main findings:** The article contends that as much as training underpins the process of performance management, training is also fortified by performance management. Precisely, there cannot be performance management without training and *vice versa*.

**Practical/managerial implications:** As much as training is imperative in the management of performance in the public service, such training must be need-based and it must be underpinned by performance management through identification of skills gap in the assessment of performance.

**Contribution:** It is proposed that to enhance the knowledge, capacity, effectiveness and efficiency of the public service performance, needs-based training that seeks to close the skills gap, is developed and adequately implemented.

## Introduction

*Public Service Regulations* of 1999 provide that both present and prospective public servants ought to be trained so as to achieve an efficient, effective, non-partisan and career-oriented public service, which is 'broadly representative' of the South African community in terms of section 195 of the *Constitution of the Republic of South Africa,* 1996 (Du Toit, Knipe, Van Niekerk, Van der Waldt & Dolve, 2002). Such Regulations also provide that programmes to educate, train and develop public servants should be demand-driven and that they must seek to address the identified challenges of lack of skills and capacity among others. That is, the public service should at all cost avoid trainings that are not aligned with the skills gap identified. However, proper measures of identifying this lack of skills and capacity must be designed so as to address the existing challenges. In the context of South Africa, the Department of Higher Education and Training (2016) compiled a report on the skills supply and demand in government departments and reported that there is a dire shortage of skills in the country, needless to say that only 20% have a tertiary qualification, 32% have completed secondary education and close to half of the workforce do not have a grade 12 certificate. This lack of requisite skills has a negative impact on the provision of basic services.

Kroukamp (2011, p. 25) is of the view that for government departments to improve the relevance of their skills development plans, it is critically important to strengthen, through a coordinated approach with all role players, the manner in which skills assessments and provision are done. Unfortunately, the skills audit as well as the trainings provided to public servants, often through National School of Government (NSG), are often not aligned (Mello, 2015; Munzhedzi, 2011). Performance management also has a positive contribution towards training management, including that of assisting public service managers to identify and pinpoint performance gaps and weaknesses.

The purpose of this article is to explore the relationship between performance management and training in the South African public service. The article commences by providing a coherent conceptualisation of the notions of performance management and training with the view of establishing a commonality in their understanding, at least in the context of this article. The article further argues that the relationship between the two is inevitable in that training often ensues after the lack of skills and capacity has been identified through the performance management process. It is for this reason that Munzhedzi (2011) propounds that, performance of both individual employees and by extension the whole organisation is enhanced through training, which should be focused on the identified challenging areas. For adequate understanding, training and performance management are conceptualised before the exploration is advanced.

## Conceptualising performance management and training in the public service

According to Armstrong (1995, p. 429), performance management is a means of getting better results from an institution, teams and individuals by understanding and managing performance within an agreed framework of planned goals, standards and competence requirements. Cardy and Dobbins (1994, p. 2), on the other hand, define performance management as a formal and systematic process by means of which the job-relevant strength and weakness of employees are identified, measured, recorded and developed. Although performance management may sound as if it has the same meaning as a performance management system (PMS), they are different. A PMS is an authoritative framework for managing employee performance that includes a policy framework as well as a framework relating to all aspects and elements in the performance cycle, including performance planning and agreement, performance monitoring, review and control, performance appraisal and moderating and managing the outcome of appraisals (Mello, 2015; Munzhedzi & Phago, 2014; Simeka Management Consulting, 2004). Munzhedzi (2011, p. 14) also posits that PMS gives guidelines on how everything to do with performance management is to be done, from goal setting and deciding how to measure accomplishments to providing regular assessments.

A PMS is also a process that begins by translating overall institutional objectives into clear individual objectives that will be set as targets for individual employees on a quarterly or annual basis (Amos, Ristow, Ristow & Pearse, 2008, p. 286). The performance target of individual employees also sets the agenda for supervisors and individual employees regarding the monitoring and reviewing of performance. It is in those set performance targets and requirements that the satisfactory or non-satisfactory performance of employees will be determined. After such determinations, good performance may be rewarded and poor performance may be improved through appropriate improvement measures. Good performance refers to a performance where an employee achieves the set performance targets and bad performance refers to a performance where an employee consistently fails to achieve the set performance targets (Aguinis, 2009; Mello, 2015; Viedge, 2011). In essence, performance management is the means applied to harness available resources to improve performance, productivity and service delivery in the context of the public service. It therefore means that performance management focuses not only on the management of the workforce but also on the effective, efficient and economic use of requisite resources including but not limited to financial and material resources. Most important is that the said resources may be properly managed by a trained and competent workforce.

Institutions all over the world are often applying wide-ranging strategies to stay ahead of global competition insofar as training and development is concerned. In order to stay ahead of the said competition, Kroukamp (2011, p. 24) posits that institutions should continuously invest in the skills and knowledge capital of the workforce through *inter alia* training. However, it can be argued that training is not a miracle cure by which all management and administrative challenges can be unravelled. It is one of the pivotal human resource development practices that may be used by an institution to capacitate and improve the productivity of their workforce (Erasmus, Loedolff, Mda & Nel, 2008, p. 45). Training basically refers to a learning opportunity that is provided in order to improve individual as well as organisational performance (Vukovic, Zavrsnik, Rodic & Miglic, 2008, p. 655), and it assists government to develop some kind of necessary capacities of public servants and promote institutional change. The said capacitation contributes towards equipping these public servants with the necessary knowledge, skills and competencies to achieve their set performance targets effectively and efficiently. Like performance management being a paramount factor in training and development, training plays a crucial role in the performance management process. Of paramount importance, as far as Kroukamp (2011) is concerned, is that training is one mechanism which, if properly utilised, could bring about a visible change in the performance of the public service. The ensuing discussion focuses on the different training models applicable in enhancing the skills gap that would have been identified through the performance management process further supporting Kroukamp's (2011) argument that performance and training are inextricably interconnected to

each other. Mello (2015) correctly notes that for good management performance to take place, a proper functioning PMS is necessary. That is, a proper PMS is a prerequisite for proper performance management.

# Various training models to enhance performance in the public service

There are different models that are used to impart knowledge and skills in the public service officials, namely, orientation training, e-learning, sensitivity training, team building, case study, coaching and job rotation (Du Toit et al., 2002). Department of Higher Education and Training (2016) indicates that there is a mismatch between the kind of skills and competencies that are in demand versus what the education sector is currently supplying. Department of Higher Education and Training (2016) further notes that skills that lack in the main are those in the scare skills professions, including but not limited to health sciences, accounting and engineering. These lacking skills are the ones that are needed the most, but they are in short supply. To a certain extent, this may affect the overall organisational performance because there is generally lack of skills in the South African public service including at the local sphere of government. The different models of training that the government may consider in addressing the lack of skills and capacity are discussed below.

## Orientation training

While new employees may have requisite academic qualifications, they often lack necessary familiarity with specific circumstances and skills of the new job (National School of Government, 2015; Underwood, 2002). It is paramount that each and every new public service employee is orientated so that he or she may be familiarised with the new work environment including all the technicalities required. It is therefore a prerequisite for all new employees to be oriented (Public Service Commission, 2014). The performance of an employee who has not been oriented is likely to be affected in that the employee does not have a clear picture of the organisational objectives and his or her part in a bigger puzzle. It is critical that an employee understands or be oriented of the bigger picture in the organisation so that he or she may be able to link his or her performance targets with the organisational annual plan, strategic plan, vision and mission and the National Development Plan (NDP) in the case of government in its entirety (Minnaar, 2010). It is therefore crucial to ensure that new employees are oriented so as to augment their performance and the management of it thereof.

## Sensitivity training

Sensitivity training refers to training that focuses on improving interpersonal relations (Du Toit et al., 2002, p. 181; Mello, 2013; Underwood, 2002). In this case, it is assumed that emotional problems contribute negatively in the job performance of employees. Van der Weisthuizen and Wessels

(2013, p. 334) purport that the main aim of sensitivity training is to sensitise or make employees aware of their own behaviour and how such behaviour affects fellow co-workers. This effect may either be positive or negative. It is for this reason that most public service institutions have got a specialised unit called 'Employees' Wellness Programme', which basically focuses on the wellness of employees. It does counselling for employees who either have marital, drug or alcohol problems particularly because all these 'not work-related' problems directly or indirectly do affect the performance of the employees in the public service. It is therefore safe to say that work-related skills alone do not matter as far as performance management is concerned.

## Team building

Team building is often about new or even old employees of the department or the municipality getting to know each other in a not-so-formal environment. According to Van der Weisthuizen and Wessels (2013, p. 334), team building addresses information about how the groups work together, what problems exist and what norms are followed and sought. Activities associated with team building are goal setting, development of interpersonal relations and clarification of roles and responsibilities (Du Toit et al., 2002; Knipe, 2002). After the interactions, the facilitator assists the group to understand the feedback and also develop the action plans so as to improve the processes and increase trust and openness. The more employees interact, the more they get to know each other and the more they know and trust each other, the more they are likely to perform well as a group and the more they perform well as a group, the more the organisation is likely to be productive, which ultimately results in improved service delivery.

## Simulation

Simulation refers to a method whereby a particular work is done in the presence of the employees or trainees, thereafter, those employees will have to replicate it to show that they have learned. The main objective of simulation is to show that employees may be able to replicate that which they have learned (De Cenzo & Robbins, 1994, p. 269; Knipe, 2002; Van der Westhuizen & Wessels, 2013, p. 335). Some of these works is done or shown to a group but individual employees have to demonstrate an element of understanding.

## Case study

To demonstrate an understanding, employees or trainees may be provided with a written description of a particular actual or hypothetical case. In such cases, employees or trainees are required to analyse the case, identify and discuss the identified problem and finally suggest possible solutions. De Cenzo and Robbins (1994, p. 269) posit that the case study method seeks to show trainees that there is no easy solution to organisational problems, that there may be various but equally valid solutions and that case studies assist trainees with problem-solving skills.

## Coaching

Coaching basically refers to a case where experienced managers guide, mentor and supervise the work of those who are less experienced (Fisher, Schoenfelt & Shaw, 1993, p. 39). The advantage of coaching is that trainees receive performance feedback as and when they engage in their daily tasks and activities. With coaching, the mentor or the coach is more hands-on regarding guidance and supervision unlike the other methods of training (De Cenzo & Robbins, 1994). It is also one of the best forms of identifying underperformance and good performance. It is through this identification of the state of performance that mentors or managers are able to develop improvement or corrective plans (Erasmus, Swanepoel, Schenk, Van der Westhuizen & Wessels, 2005, p. 337). It is through coaching that underperformance is identified and addressed as and when it is identified, meaning that the coach does not have to wait until the end of the quarter or the financial year. However, other scholars including Fisher, Schoenfelt and Shaw (1993, p. 39), are of the opinion that the disadvantage is that the trainee may adopt the manager or mentor's way of doing things, which may at times not necessarily be the best there is. This article argues that coaching is one of the best method of training and performance management ingredient compared to other training models discussed.

## Job rotation

Job rotation refers to a method of moving employees from one job assignment to another within the same organisation and possibly in the same salary or job level (Van der Westhuizen & Wessels, 2013, p. 336). This is done to give employees a broader perspective of the mission, vision and objectives of the organisation. In a way, job rotation encourages generalists instead of job specialists in that organisational employees obtain overall perspective of the organisation. In short, you can not only be able to manage organisational human resource but also you must be able to develop strategic plan, draft budget and project expenditure, train the unskilled, analyse expenditure patterns and so on. It also becomes easier to cover for an employee who is on leave or replace an employee who has just resigned because other employees are generalists as well and they can fill in the gap in no time. It therefore means that there is a greater benefit in job benefit in that individual employees are exposed to broader organisational objectives and operations (Decenzo & Robbins, 1994, p. 272) than specialising or having one focus area. It is also a common purpose that more employees may appreciate being exposed to other greater opportunities than to do routine and boring work. However, a disadvantage may be that other employees have become more like specialists in their specific field of work. This may mean that they may not want to be rotated for the fact that they are already a specialist and learning a new field may prove to be difficult.

Nevertheless, job rotation is a positive contribution not only to public service training but also to performance management. An individual employee may be moved from one unit to another for having under-performed or lack of skills on their previous division or unit. The movement is often done with an anticipation that the identified employee will perform better in the new unit because they have a particular skill, qualification or desire that may assist him or her perform better in the new unit.

## E-learning

E-learning refers to a learning approach whereby learning resources, including booklets and software materials, are provided electronically to the targeted group of public service employees (More, 2002; Van der Westhuizen & Wessels, 2013, p. 336). These learning materials could also be a video, audio, slideshow or web-based training services provided through online portal. The advantage of this form of training is that to an established organisation, this may be cost-effective in that the institution does not have to hire an external service provider or a physical being to conduct training. The Information Technology (IT) devices may be able to provide such training with a click of a button. It is important to note that the introduction of technology must be accompanied by technological illiteracy of employees as well as availability of relevant equipment (Mathevula & Uwizeyimana, 2014). E-learning may be a valuable tool of conveying needed information to public officials. While the same IT devices may be valuable for training purposes, they may be used to capture performance management information as well. Such information may include submission of performance instruments, underperformers, good performers and those who are in need of training. It further justifies the fact that the relationship between performance management and training is inevitable.

However, E-learning may prove to be a challenge in a country like South Africa where computer illiteracy is widespread (Mathevula & Uwizeyimana, 2014). It means that government in its entirety may have to strengthen its base and capacity regarding its effort to train its officials.

The foregoing paragraphs highlighted various types of training model that may be used to impart knowledge and capacity in the public service officials particularly for skills gap identified through the performance management process. However, each of these different models has got its own *pros* and *cons*. Nevertheless, each one of these models may contribute positively to the development of capacity in the South African public service, particularly if others may be applied simultaneous, such as coaching and job rotation. Munzhedzi (2011, p. 34) posits that it is imperative for the municipality (or the public service in this case) as provided for by section 45 of the *Municipal Systems Act*, 2000 (Act 32 of 2000), to conduct a performance audit in order to find out their strengths and weaknesses. In essence, these models are not only enablers of training insofar as capacitation is concerned but they complete the performance management process in that underperformers are assisted through the very same models discussed. The ensuing paragraphs discuss

different role players and the specific role they play in the performance management process.

# Role players in the performance management system

There are several role players in the process of managing performance in the public service. These role players include the Public Service Commission, the Department of Public Service and Administration (DPSA), NSG, trade unions and employees. These role players are discussed in detail below.

## Public Service Commission

The Public Service Commission (PSC) was established in terms of section 196 of the 1996 *Constitution* as a chapter 10 institution that promotes values and principles set out in section 195, throughout the public service (Republic of South Africa, 1996). Some functions of the Commission are to propose measures to ensure effective and efficient performance within the public service. The Commission also has a watchdog role to play in that it investigates, monitors and evaluates human resource practices of the public services (Erasmus et al., 2005, p. 9; Mello, 2013; PSC, 2014). The performance agreements of Provincial Heads of Department and National Directors General are coordinated by the Office of the PSC. The implementation of human resource policies are monitored and evaluated at the PSC. Upon completion of its processes of investigations, inspections, monitoring and evaluations, the Commission publishes its findings as public reports. Some of the reports published include a report on the payment of performance incentives (bonuses or pay progression) to Heads of Departments without annual performance evaluations conducted in 2008 and a report on the analysis of Performance Agreements as an effective performance management tool conducted in 2009. A PSC has further responsibility to advise national and provincial organs of state regarding personnel practices relating to recruitment, appointment, transfer, discharge and career management (Mello, 2015; PSC, 2014). It is the responsibility of the PSC to ensure that policies such as the PMS are properly implemented in the public service and advise where necessary.

## Department of Public Service and Administration

According to the *White Paper on Human Resource Management in the Public Service* of 1997, the DPSA focuses in terms of human resources solely on the public service. The key responsibilities for the DPSA include developing human resource policies, getting support for such policies from organised labour at national level, ensuring practicality of application for the policies and ensuring that human resource policies are aligned with other transformation initiatives (Department of Public Service and Administration, 1997; Erasmus et al., 2005, p. 35). The DPSA also has to give support service to national departments and provincial administration regarding the implementation of human resource policies and development of capacity to implement the developed policies and programmes. Even the first PMS policy

framework was initiated by the DPSA in 1999 to serve as a guide to national and provincial departments in developing their own departmental policies. All public service institutions have to align their policies with DPSA's framework. Individual performance targets have to be aligned to the departmental goals and objectives in order to enhance the overall performance of the department (Banfield & Kay, 2008, p. 310). However, the policy of a specific department must be in line with the DPSA's policy framework on a PMS and each department's policy must be relevant to its own needs and circumstances.

## National of School of Government

NSG seeks to contribute towards establishing a capable, professional and responsive public service that is committed to and has institutionalised the values and policies of a Developmental State (National School of Government, 2015, p. 10). The NSG was officially launched in 2013, which was a replacement to the Public Administration Leadership and Management Academy (PALAMA) and this was established in 2008 as a replacement for the South African Management Development Institute with the mandate of facilitating training provision to public servants (Kroukamp, 2011, p. 26). NSG is constituted as a Schedule 1 department by the *Public Service Act*, 1994 (Proclamation 103 of 1994) as amended by the *Public Service Act*, 1999 (Act 5 of 1999). NSG is headed by a Director-General who reports to the Minister of Public Service and Administration. NSG, as the public sector training academy, has a central role to play in building the capacity of the public service to perform effectively and efficiently (PALAMA, 2010, p. 3). PALAMA trains and develops public service employees in order to enable them to improve their performances, which will then contribute to the improvement of public service delivery.

However, there are major challenges facing NSG in the fulfilment of its mandate of contributing to the development of a high-performing public service by capacitating public servants (PALAMA 2010, p. 4). One of the challenges includes the uncoordinated way in which public service training is conducted. PALAMA aims to ensure that public servants have all the necessary skills including technical, leadership and financial. According to the *Public Service Amendment Act*, 2007 (Act 30 of 2007), there shall be a training institution listed as a national department, which shall provide training or cause such training to be provided (Republic of South Africa, 2007). Lack of understanding of a PMS in the public service should be addressed by NSG through relevant training programmes.

## Trade unions

The *Labour Relation Act*, 1995 (Act 66 of 1995) defines a union as an association of employees whose primary purpose is to regulate the relations between employees and employers including associations that represent employers. A union that wishes to continuously be in touch with issues affecting its members in any institution will ensure that it has a shop

steward at every level possible (Republic of South Africa, 1995; Bendix, 2001, p. 167). Unions have to ensure that the management of an institution recognises their shop stewards because they (shop stewards) play a pivotal role in the workplace in all matters that affect their membership. It must also be highlighted that public sector employment is highly unionised with majority of its employees affiliated to one union or the other (Kroukamp, 2011, p. 22). Congress of South African Trade Unions constitutes majority of the public service employees. From the development of a PMS policy to the facilitation of the process, trade unions play a role in representing the interests of their members. The unfair treatment of employees with regard to payment of performance bonuses or subjective assessment of employees' performance often leads to trade unions being in endless confrontations with management. The shop steward has to ensure that the relationship between the union and its members is maintained and promoted (Bendix, 2001, p. 168). When employees have not received performance bonuses at the end of the financial year, they often lodge complaints with a trade union against their employer. Trade unions also intervene when their members allege that they have been treated unfairly as far as the PMS is concerned.

# Capacity versus training and performance management

There is an inevitable relationship between the human capacity of public service employees together with their training and performance management. Capacity refers to the availability of and access to concrete or tangible resources (human, financial, material or technological) and having the knowledge to implement policies and the delivery of public services (Koma, 2010, p. 114). Capacity may also refer to the intangible resources such as commitment to, and leadership for, the implementation of policies and delivery of public services (Brynard & De Coning, 1999, p. 2006). It may also be associated with potential to translate policy objectives into practical and tangible outcomes, which are often the needs of the community as captured during the development of *manifestos* by political parties. It is generally well accepted that some policies of government are very good and well thought of. However, the question of capacities of public functionaries always come into play. No matter how good the public policies are, lack of capacity often results in limited or no implementation of those policies at all. In a way, capacity makes a huge difference between a good and a bad public policy.

Lack of capacity to translate the said policies is often identified through performance management processes, namely, quarterly and annual assessments often by supervisors. Through the said assessments which are done on a regular basis, supervisors are able to pinpoint and identify lack of skills and capacity, underperformance and good performance by officials. However, it must also be noted that underperformance is not always as a result of lack of skills and capacity. It may also be because of pure laziness. It is also

the view of Ivancevich, Konopaske and Matteson (2011, p. 209) that employees should not be required to perform responsibilities that exceed their current skill or knowledge level if they have not received training. More efficient structures, procedures and criteria of training have to be established with the Public Service Sector Education and Training Authority taking the lead role in this respect (Munzhedzi, 2011, p. 30). However, the process does not end at the regular assessments of performance but at closing the gap between the lack of skills and capacity and achieving the set performance objectives. Training plays a vital role in the implementation of a PMS in any public service institution. A PMS that is not linked to training is not likely to succeed in the inculcation of maximum performance. Lack of training in an institution can result in underutilised abilities (Byars & Rue, 2006, p. 222).

To be precise, an inevitable relationship between skills and capacity, training and performance management exists. It often starts with identification of lack of skills and capacity through performance management and proceeds with training of those with limited skills and capacity. It must be noted that one may only identify weaknesses and strength if you assess that particular performance. It is then that training may be effected to enhance skills and capacity of those found to be lacking. However, Munzhedzi (2011, p. 78) correctly postulates that in government most of the training that is done is not aligned to the skills gap or challenge. Nevertheless, the Public Service Commission (2010, p. 8) is emphatic on the fact that the functioning of the machinery of government needs to be strengthened through the development of appropriate skills to ensure that institutional capacity is built and services can be delivered optimally.

## Conclusion

In essence, the South African public service is essentially responsible for bringing government policy into practice. Basically, the public service is there to implement government policies and realise the policy objectives into practical operations. However, implementation of government policies may not be such a smooth process if the implementing body, namely, the public service does not have capacity to implement. It is the duty of government to ensure that underperformance and lack of skill and capacity are pinpointed and identified so that they may be addressed through appropriate measures. Kroukamp (2011) correctly posits that the numerous training programmes developed to address the skills gap in the field of public administration and management, be it the formal curricula, work-integrated learning to improve the challenges regarding bridging the gap between theory and practice or Memoranda of Understanding between different role players to transfer skills for improved service delivery, should adequately reflect and address ongoing challenges seeking to improve productivity or service delivery in the case of the public service. To this end, orientation, sensitivity training, e-learning, job rotation, coaching, case study, team building and simulation are some of the measures that may be used to

address skills and capacity gap in the public service so as to ultimately improve performance of employees. However, performance management as a system that is used to identify performance gaps must also be beefed-up so that it may be able to do so effectively. The implication of this analogy is that, if skills gaps are not correctly identified through PMS, the training programmes developed may incorrectly solve the wrong problem and the service provision is going to suffer. Wessels (2006, p. 1505) also concurs that if the wrong problem has been diagnosed or if the wrong skill shortage has been identified, then wrong or inappropriate solutions may be proposed. As a result, employees will be trained on skills they do not need, meaning the wrong problem will be addressed. Munzhedzi (2011, p. 78) postulated that training could play a paramount role in the improvement of performance and productivity in government. However, there must be a proper skills audit and training based on proper and regular assessments. In order to avoid unnecessary expenditure on training, the impact (of these trainings) should be seen through the performance of an employee. Nevertheless, the significance and the unavoidable link between the two variables, namely, performance management and training cannot be overemphasised because they complement each other, and that one cannot be successfully be undertaken without the other.

# Acknowledgements

## Competing interests

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# Bias and equivalence of the Strengths Use and Deficit Correction Questionnaire in a South African context

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**Orientation:** Developing personnel into skilled employees is a major focus of managers and companies. Doing this in a valid way in a cross-culturally diverse working environment may be challenging. It is, therefore, important to investigate the cultural consistency of new tools that assist managers in reaching these personnel development goals.

**Research purpose:** Determine whether the Strengths Use and Deficit COrrection (SUDCO) questionnaire is universally applicable across the Nguni, Sesotho and West-Germanic language groups in South Africa by evaluating it statistically for bias and equivalence.

**Motivation for the study:** South African personnel management could gain valuable insights and outcomes when they aim to improve both strengths and weaknesses.

**Research design, approach and method:** The study employed semi-stratified sampling. A sample ($N = 658$) of employees in the banking sector participated in the study. The research focused on psychometric properties relating to bias, structural equivalence and reliability.

**Main findings:** A four-factor model fitted the data best. This model described perceived organisational support (POS) for strengths use, POS for deficit correction, strengths-use behaviour and deficit-correction behaviour. A multi-group confirmatory factor analysis for the direct comparison of the SUDCO's fit across the language groups (Nguni, Sesotho and West-Germanic) showed the 33 were unbiased against any of the three language groups and structured into the same four latent constructs.

**Practical implications:** In personnel development, employees and managers should understand the benefits of a combined strengths and deficit approach as relating to different language groups.

**Contribution:** The study contributes to literature a cross-culturally validated measure for the assessment of strengths and deficits.

## Introduction

Talent management stands out among the human-capital challenges that organisations in South Africa face today. Among challenges such as leadership, retention and engagement, diversity and inclusion, workforce capability, and talent acquisition (Deloitte & Touche, 2014), talent management makes up the largest component of business operating expenses. The average costs of talent management are estimated in the range of 70% – 80% (Director, Cascio & Boudreau, 2013). Therefore, to maintain a competitive advantage, organisations adopt a human-capital strategy with a similar level of precision and analyses as capital investments in plants and equipment (Echols, 2005). To optimise the effect of factors related to human capital on overall business performance, organisations strongly emphasise practices of performance management aimed at improving employee deficits (Aguinis, Gottfredson & Joo, 2012). Positive dimensions underlying personnel development, such as strengths, have received relatively little attention, particularly from a cross-cultural perspective. The present study aims to close this gap between strengths and culture.

### Literature review

#### The Strengths Use and Deficit COrrection Questionnaire

In an attempt to fill the gap of the one-sided focus on deficits, industrial psychologists proposed a shift towards positive psychology. One of the outcomes linked to this shift in thinking was the development of a strengths-based approach (hereafter: SBA) (Seligman, Park & Steen, 2004). SBA is a positive aspect of psychology that focuses on peoples' strengths (Seligman & Csikszentmihalyi, 2014). The value of an SBA is well documented in literature. This entails practices such as positive

leadership, a strengths-based organisational culture and appropriate change management (e.g. appreciative inquiry). Evidence shows that these practices can help companies meet their business goals (Tombaugh, 2005). Furthermore, research indicates a positive association between the variable use of strengths with engagement (Van Woerkom, Oerlemans & Bakker, 2016), performance (Tombaugh, 2005) and positive effect (Meyers & Van Woerkom, 2016). Other findings show that SBA provides employees key support in achieving goals, which leads to an increased need for satisfaction and well-being (Linley, Nielsen, Gillett & Biswas-Diener, 2010). The Strengths Use and Deficit COrrection (SUDCO) questionnaire is an extension of this line of thinking.

Van Woerkom et al. (2016) developed the SUDCO questionnaire with four dimensions in mind. The first two dimensions, perceived organisational support (hereafter POS) for strengths use and deficit correction, were based on the theory of perceived organisational support. Traditionally, POS has been conceptualised as the generalised beliefs about the extent to which an organisation supports its employees (Eisenberger, Fasolo, Davis-LaMastro, 1990; Eisenberger, Huntington, Hutchison & Sowa, 1986). This construct is based on the social exchange theory, which postulates that employees reciprocate their salary and benefits by ensuring productivity and performance, provided they perceive their organisation would support them in turn (Armstrong-Stassen & Ursel, 2009). As a result, employees' form positive or negative perceptions based on the following actions: how an organisation creates meaningful jobs, handle employees who err and invest in establishing a positive working environment (Eisenberger, Huntington, Hutchison & Sowa, 1986). Furthermore, employees view their organisation as supportive if individuals are allowed to participate in decision-making, deem the rewards system to be fair and are provided training (Allen, Shore & Griffeth, 2003) which lead to opportunities for self-development and growth (Armstrong-Stassen & Ursel, 2009).

A strength is a natural capacity for behaving, thinking or feeling in a way that allows optimal functioning and performance to fulfil one's goals (Linley & Harrington, 2006). POS for strengths use, therefore, can be defined as the extent to which employees perceive organisations to support them by utilising their strengths and talents in the workplace. This dimension also shows a strong connection with the theory of strength-based psychological climate, which similarly is described as employees' perceptions of formal and informal practices, processes and procedures regarding their organisational support in the identification and use of strengths (Van Woerkom & Meyers, 2014). Evidence suggests that POS for strengths use is a significant predictor of work-related aspects such as burnout (Keenan & Mostert, 2012), engagement (Keenan & Mostert, 2012; Stander & Mostert, 2013; Van Woerkom et al., 2016) and job performance (Van Woerkom & Meyers, 2015).

POS for deficit correction can be defined as the extent to which employees perceive their organisations to support

them in developing or correcting their deficits at work. Organisations apply processes for performance management to identify deficits and adopt interventions at various levels in the organisation. Such organisational input entails on-job learning, training and coaching to improve performance (Gilley, Gilley & Kouider, 2010; Kirkpatrick, 2006). In a study by Ellinger (2003) involving four organisations, it was found that organisations' interventions to correct deficits resulted in improved learning, performance and innovation among employees. The same study also indicated benefits for the organisation such as saving costs, improving systems and sharing knowledge. Similarly, further studies conducted with leaders and employees suggest that working on deficits does improve performance (Longenecker, 2010; Zenger, 2008).

Even though organisations play a significant role in supporting their employees in strengths use and deficit correction, the individuals also need to be proactive in managing this development themselves. Based on this reasoning, proactive behaviour for strengths use can be defined as the employees' self-starting behaviour aimed at using their strengths in the workplace. Crant (2000) argues that proactive behaviour in the workplace means taking the initiative to improve current circumstances or create new ones by challenging the status quo, rather than passively adapting to present conditions. People who know their strengths, apply it by taking the initiative to improve their environment and build networks (Thompson, 2005). This process leads to higher levels of work engagement (Van Woerkom et al., 2016; Xanthopoulou, Bakker, Demerouti & Schaufeli, 2009), increased performance (Corporate Leadership Council, 2002; Crant, 2000; Thompson, 2005) and an improved state of well-being (Govindji & Linley, 2007).

Proactive behaviour in correcting deficits can be defined as employees' self-starting behaviour to help improve deficiencies in the workplace that may be perceived as hampering performance (Van Woerkom et al., 2016). In performance management, employees' performance is assessed and they receive feedback from their direct reporting line. During this process, employees' areas of development or deficits are identified. Employees who are proactive demonstrate the following behaviour patterns: familiarise themselves with the expected performance standards, request help from other team members (Torrente, Salanova, Llorens & Schaufeli, 2012), spend more time practicing or doing on-the-job training (Ericsson, Nandagopal, & Roring, 2009) and ask for feedback on their performance (Belschak & Den Hartog, 2010). Findings show that employees' proactive behaviour towards deficit correction also leads to continuous learning (Rowold & Schilling, 2006).

## Assessment within the South African context

Psychometric assessments are used mainly in recruitment, selection and placement to secure employment or promotional opportunities. In South Africa, the use of tests for these purposes are highly regulated. In the labour market

(including the banking sector) as promulgated in the *Employment Equity Act* 55 of 1998 (section 8), the use of psychometric assessments is prohibited unless it (1) had been scientifically shown to be valid and reliable, (2) can be applied fairly to all, (3) is not biased against any employee or group and (4) is classified by the Health Professions Council of South Africa (Department of Labour, 1998). The existence of laws prohibiting discrimination in the workplace does not always guarantee that women, people from different ethnic backgrounds, or those from other segments of the workforce have equal employment opportunities (Deloitte & Touche, 2014). In several cases, information about the quality of assessment is emitted. Psychological development and assessment trends in South Africa are thus important for a comprehensive focus on the misuse of measures. Such misuse entails the following: measuring different groups, investigating test properties and applying test results without considering the differences in socio-cultural, economic and educational factors (Foxcroft & Roodt, 2009).

### Bias and equivalence

Examination of threats to fair assessment is categorised as bias and equivalence, and includes advanced statistical techniques to determine the impact of either. Analysis of bias and equivalence focuses on different levels or types of biases in which equivalence can be seen as the opposite pole of bias. In other words, when the test scores are equivalent, bias is absent (Van de Vijver & Tanzer, 1997). Three sources of bias can be distinguished, namely, those of constructs, methods and items (Van de Vijver & Leung, 1997).

Item bias refers to unwanted distractions of a scale at the item level (Van de Vijver & Leung, 2011). The main concept linked to item bias is familiarity. Particular words or phrasing within the item may be unfamiliar to the person who is tested, thus leading to a loss of accessibility. People belonging to different cultural groups than the one in which the item was developed, thus may respond in a consistently dissimilar manner (He & Van de Vijver, 2012; Meiring, Van de Vijver & Rothmann, 2007). Furthermore, bias may be associated with events in the administration of the test, such as the interviewers' characteristics (e.g. gender, cultural group), communication problems (poor use of language by either party) or other procedural aspects when collecting the data (Van de Vijver & Leung, 2011; Van de Vijver & Tanzer, 1997).

At the opposite end of the scale is construct bias. This form of bias occurs when constructs differ in meaning or interpretation across cultures or language groups (He & Van de Vijver, 2012). The logical underpinning would be that the construct under investigation is not part of universal human functioning, but an invention from within a particular cultural context. Between the extremes of item and construct bias, lies method bias. This form of bias can emerge because of the research method or weakness in the applied procedure during empirical studies (He & Van de Vijver, 2012). On the other side, bias may occur because of cognitive strategies applied by the study participants in more complex performance tasks. As a result, method bias covers the terrain of construct and item bias. However, there are no set techniques to examine method bias (Podsakoff, MacKenzie & Podsakoff, 2012).

The study of equivalence is an approach or method to assess bias. Equivalence is a measure of similar scores and an indication of the differences found within the scores. Score differences do not only consist of mean differences but also of measurement weights, measurement intercepts, structural means and measurement residuals. Weights and intercepts do model item bias. Uniform bias is found in the intercepts: one culture may score consistently higher or lower than another one, irrespective of the true level of the construct. Non-uniform bias is found in significant regression weights of an item on its applicable latent variable; the effect of culture is different in size for exponents who score high and low (Van de Vijver & Leung, 1997). Structural means and measurement residuals serve to model properties of the construct; their assessment asks whether in each culture the starting point of the scale is similar; thus whether in each culture the scales can be juxtaposed, and will completely mirror each other without any deviations (Van de Vijver & Leung, 2011).

### Applying mean score differences

When a construct shows comparability across cultures, there is still sufficient room for individual variation within cultures, particularly for variables of development over people's lifespan. Relations of age and the SUDCO dimensions may be expected to have the same direction in different cultures, but they differ in strength. It is a challenge for most organisations to manage the often conflicting views and needs of a diverse workforce, covering a wide range of generations from the so-called Baby Boomers to Generation X and Generation Y. Organisations who invest in career progression initiatives and offer opportunities for training and development will be able to attract the most talented young people and retain them for extended periods (Deloitte & Touche, 2014). Furthermore, leaders face the challenge to manage diverse employees across different ages, generations and gender. Access to life opportunities in South Africa is divided according to gender, language and other dimensions (Keeton, 2014). Women, in particular, lag behind in terms of skills development and work opportunities (Deloitte & Touche, 2014; Mateus, Allen-Ile & Iwu, 2014).

### The present study

The aim of the present study is to determine whether the SUDCO questionnaire is universally applicable across three South African language groups by evaluating it statistically for bias and equivalence. The two existing studies that examined cross-cultural validity of the SUDCO in South Africa did so with a limited definition of social group differences (Els, Mostert & Brouwers, 2016; black vs. white) and with a limited coverage across the South African population (Theron, Mostert & De Beer, 2015; the West-Germanic language group vs. the African language group,

but where the African language group consisted mainly of only one out of 11 African languages, namely, Setswana). Furthermore, none of these studies examined the functioning of the SUDCO in relation to primary demographic variables, such as age and gender, variables that uphold valuable individual differences in the face of cross-cultural similarities. Therefore, the present study aimed to determine whether the SUDCO shows meaningful relationships with demographic variables such as age and organisational tenure, and whether gender is a critical moderator.

# Research design
## Research participants

Data were gathered from employees in the banking sector ($N$ = 658) using convenient sampling. Participants with varying demographic characteristics including race, age, gender, education and language were sourced across different organisational levels and departments within one major bank. The demographic characteristics relevant for the present study are displayed in Table 1.

As indicated in Table 1, the sample consisted of 463 females (69.26%) and 194 males (30.74%), and one participant did not indicate his/her gender. The youngest employee who participated was 19 years old, with the oldest one 60 years, with a mean age of 31.50 years and a standard deviation of 7.92. Most participants had high school education (64.10%), while others had post-matric education (16.60%). The majority of the sample came from the West-Germanic (English and Afrikaans) language group (44.29%), followed by the Nguni (isiZulu, isiXhosa, isiNdebele and SiSwati) group (29.22%) and the Sesotho (South Sesotho, Sepedi and Tswana) group (26.48%). In terms of organisational tenure, participants were evenly distributed, with the smallest group of 11.10% employed for less than 1 year, and the largest group of 19.90% for 2–3 years. Even though most participants indicated English as their second language, they were proficient in English as it is considered an official requirement for business communication within the bank.

**TABLE 1:** Characteristics of participants.

| Item | Category | Frequency (658) | Percentage |
|------|----------|-----------------|------------|
| Gender[a] | Male | 194 | 30.74 |
| | Female | 463 | 69.26 |
| Language | Nguni | 192 | 29.22 |
| | Sesotho | 174 | 26.48 |
| | West-Germanic | 292 | 44.29 |
| Organisation tenure | < 1 year | 73 | 11.10 |
| | 1 year | 123 | 18.70 |
| | 2–3 years | 131 | 19.90 |
| | 4–7 years | 106 | 16.10 |
| | 8–11 years | 120 | 18.20 |
| | ≥ 12 years | 105 | 16.00 |
| Qualification | Grade 12 | 127 | 19.30 |
| | Diploma | 422 | 64.10 |
| | University degree | 109 | 16.60 |

$N$ = 658.
[a], For one participant, the gender is unknown.

## Measuring instruments

A socio-demographic questionnaire was administered to determine the biographical characteristics of participants. Questions were posed to determine age, gender, home language, educational qualifications and ethnicity, as well as external dimensions such as current position, job tenure and level of qualification.

The SUDCO (Van Woerkom et al., 2016) was used to measure strengths use and deficit correction. The SUDCO consists of four sub-scales: (1) POS for strengths use, including eight items (e.g. 'In this organisation, employees can do their jobs in a manner that best suits their strong points', (2) POS for deficit correction, including eight items (e.g. 'This organisation emphasises the development of employees' weak points'), (3) strengths-use behaviour, measured by nine items (e.g. 'I actively look for job tasks I am good at') and (4) deficit-correction behaviour, measured with eight items (e.g. 'In my job, I concentrate on my areas of development'). These four constructs were measured on a 7-point Likert-type scale ranging from 0 (almost never) to 6 (almost always). Van Woerkom et al. (2016) also found the scales to be reliable, reporting Cronbach's alpha values regarding POS for strengths use: α = 0.95; POS for deficit correction: α = 0.89; strengths-use behaviour: α = 0.90; and deficit-correction behaviour: α = 0.90.

## Research procedure

Permission was obtained from the Group Human Capital (GHC) division of the participating bank to conduct the research within different business units. The GHC division requested that a disclaimer should be stipulated on the questionnaire confirming that the study was not business related but for academic purposes, to which the researcher duly obliged. The research questionnaire was designed as an electronic survey sent to research participants using internal email of the organisation. The questionnaire provided an option to accept or decline participation, thus ensuring the voluntary nature of participation. Participants were also assured of privacy and confidentiality of their responses. Meetings were scheduled with heads of the business unit to present the study objectives and request permission to conduct the survey in their respective areas. The heads then sent the electronic questionnaire to their respective team members to complete the survey at a convenient time. After a week, a reminder was sent to each team, respectively.

## Statistical analyses

The statistical analyses were conducted using a Statistical Package for Social Science (SPSS) Version 22 (SPSS Inc., 2011) and Analyses of Moment Structures (AMOS) Version 22, employing Maximum Likelihood estimation (Arbuckle, 2013). Interpretation of the results adopted both descriptive and inferential statistics (Arbuckle, 2013).

Before analysing the applicability of the SUDCO items across the three language groups in the sample, the SUDCO items

were checked for outliers, missing values and their dimensionality. Outliers were replaced by a relevant score where possible, or otherwise as a missing score. Cases with 10% or more of the items missing were removed; otherwise, missing values were replaced by their scale mean (thus leaving no missing values in the eventual dataset). Preliminary analyses were done to establish the number of dimensions underlying the SUDCO. Analyses were conducted in AMOS, comparing the relative fit of four distinct models: the hypothesised four-factor model; a one-factor model; a model with one person-oriented factor and one organisation-oriented factor; and a model with one strengths-use factor and one deficit-correction factor. Overall, fit of the four models was assessed according to the basic statistical and goodness-of-fit indices. Subsequently, fit of the competing models was examined relative to the hypothesised four-factor model. Fit is based on the chi-square ($\chi^2$) statistic and the goodness-of-fit indices, Root Mean Square Error of Approximation (RMSEA), Comparative Fit Index (CFI) and Standardised Root Mean Square Residual (SRMR), which are evaluated according to their cut-off criteria. The acceptable model fit for indices was evaluated as follows: RMSEA is acceptable below 0.06 and excellent below 0.04; CFI is acceptable above 0.90 and excellent above 0.95 (He & Van de Vijver, 2012); SRMR values less than 0.08 are generally considered an acceptable fit (Hu & Bentler, 1999).

The present study utilised recent developments to test item bias and construct equivalence in a single multi-group model in AMOS. A multi-group confirmatory factor analysis (CFA) was conducted to compare the fit of the SUDCO directly across the three language groups. While sample-size requirements do not change from two to three or four factors, having relatively more indicators per factor lowers sample-size requirements (e.g. Wolf, Harrington, Clark & Miller, 2013). With four factors and eight indicators per factor, a minimum of 150 participants seems acceptable; the sub-sample sizes of 192, 174 and 292 in the study satisfy the recommended values for CFA. Practically, within CFA bias and equivalence refer to different parameters in the model: measurement weight, measurement intercepts, structural means and measurement residuals. By using models that are nested (i.e. share most parameters, but systematically vary target parameters), their relative fit across cultures could be determined precisely. Again, fit of the models was assessed in terms of the basic statistical and goodness-of-fit indices.

Descriptive data were analysed using the means, standard deviations, reliability and the range (Tredoux & Durrheim, 2008) to determine scale functioning. In order to assess the reliability of the SUDCO, Cronbach's alpha coefficient of $\geq 0.70$ was considered as acceptable (Nunnally & Bernstein, 1994).

SPSS was also used to conduct a series of regression analyses, with the four SUDCO scales' means as the dependent variables, and age and organisational tenure as the independent variables. A stepwise procedure that removes the variance associated with age in a first step avoids violation of the possible collinearity between the two independent variables. In order to compare the two genders and three language groups, the analyses were conducted separately in terms of split groups: by gender (two groups), by language (three groups) and by combining gender and language (six groups). Significance of the coefficients and explained proportions of variance were determined by $p$ values smaller than 0.05 or 0.01.

## Results

The results section follows a strict systematic order. Firstly, the analyses are given of the number of factors in the SUDCO. Secondly, the results are reported of the multi-group analyses of the SUDCO in the three language groups, to assess item bias and construct equivalence. Thirdly, descriptives of the SUDCO scales are reported along their relations with age, organisational tenure, gender and language group.

### Factorial validity

In order to ensure the factorial validity of the internal structures of the SUDCO, four competing models were tested. While model fit is the most important criterion, factor loadings and between-factor correlations are evaluated as well.

**Model 1:** The hypothesised four-factor model consisting of four sub-scales: POS for strengths use (specified as a first factor with eight items); POS for deficit correction (specified as a second factor with eight items); strengths-use behaviour (specified as a third factor with nine items); deficit-correction behaviour (specified as a fourth factor with eight items).

**Model 2:** Items of all four sub-scales of POS for strengths use, POS for deficit correction, strengths-use behaviour and deficit-correction behaviour.

**Model 3:** Organisational factors (POS for strengths use and POS for deficit correction) loaded onto one factor and individual behaviour (strengths-use behaviour and deficit-correction behaviour) loaded onto one factor.

**Model 4:** Another two-factor model, comprising strengths-use variables (POS for strengths use and strengths-use behaviour) and deficit-correction variables (POS for deficit correction and deficit-correction behaviours).

Table 2 shows the fit of the four models that were tested. When reviewing the results for the various models of the

**TABLE 2:** Results of the competing measurement models.

| Model | $\chi^2$ | df | p | $\chi^2/df$ | $\Delta \chi^2$ | $\Delta df$ | $\Delta \chi^2/\Delta df$ | CFI | RMSEA | SRMR |
|---|---|---|---|---|---|---|---|---|---|---|
| Model 1 | 1576.05 | 489 | 0.00 | 3.22 | baseline | baseline | baseline | 0.94 | 0.06 | 0.04 |
| Model 2 | 8236.81 | 495 | 0.00 | 16.64 | 6660.76 | 6 | 1110.13 | 0.59 | 0.15 | 0.14 |
| Model 3 | 3719.77 | 494 | 0.00 | 7.53 | 2143.72 | 5 | 783.95 | 0.83 | 1.00 | 0.06 |
| Model 4 | 7353.71 | 494 | 0.00 | 14.89 | 5777.66 | 5 | 1155.53 | 0.64 | 0.14 | 0.15 |

$\chi^2$, chi-square; $df$, degrees of freedom; $p$, statistical significance; CFI, comparative fit index; RMSEA, root mean square error of approximation; SRMR, standardised root mean square residual.

SUDCO scales, Model 2 (one-factor model) compared significantly worse to the baseline model (M1) (M2 vs. M1: $\Delta\chi^2 = 6660.76$, $\Delta df = 6$, $p \leq 0.00$). In comparing the alternative Model 3 (two factors, organisational and individual behaviour scales) to the baseline Model 1 (four factors, POS for strengths use, POS for deficit correction, strengths-use behaviour and deficit-correction behaviour), the fit of this alternative model was favourable compared to Model 3 but still not stronger than that of the baseline Model 1 (M3 vs. M1: $\Delta\chi^2 = 2143.72$, $\Delta df = 5$, $p \leq 0.00$). The finally tested Model 4 (two factors, strengths and deficits scales) was also compared with the baseline Model 1, which proved a worse fit for data compared with Model 3, as well as the baseline model (M4 vs. M1: $\Delta\chi^2 = 7353.71$, $\Delta df = 5$, $p \leq 0.00$). Based on the findings from Table 2, it is evident that the baseline model (hypothesised model), fitted the data the best, compared with other models ($\chi^2 = 1576.05$; $df = 489$, $\chi^2/df = 3.22$, $p = 0.00$; CFI = 0.94; RMSEA = 0.06; SRMR = 0.04). Model 1 showed acceptable model fit as RMSEA < 0.06, CFI values were close to 0.90 (He & Van de Vijver, 2012) and SRMR values were below 0.08 (Hu & Bentler, 1999).

Table 3 shows the factor loadings for the latent variables. Factor loading on all items proved to be statistically significant ranging from 0.64 to 0.87. Regarding POS for strengths use, the smallest loading was for the following item: 'In this organisation, employees can do their jobs in a manner that best suits their strong points', with a loading of 0.72, and the highest loading was for the following item: 'This organisation ensures that people can apply their strong points in their jobs', with a loading of 0.87. With regard to POS for deficit correcting, the smallest loading was for the following item: 'In this organisation, performance appraisals address people's areas of development', with a loading of 0.71, and the highest loading was for the item: 'In this organisation, development plans are aimed to better people's weaknesses', with a loading of 0.86. For strengths-use behaviour, the smallest loading was for the item: 'I actively look for job tasks I am good at', with a loading of 0.64, and the highest loading was for the item: 'I capitalise on my strengths at work', with a loading of 0.84. Finally, for deficit-correction behaviour, the smallest loading was for the item: 'At work, I seek training opportunities to improve my weaknesses', with a loading of 0.70, and the highest loading

**TABLE 3:** Standardised factor loadings of the Strengths Use and Deficit COrrection items on the four latent variables.

| Construct | Item | Loading |
|---|---|---|
| **Perceived Organisational Support for Strengths Use (POSSU)** | | |
| This organisation uses employees' strengths | POSSU1 | 0.73 |
| In this organisation, employees can do their jobs in a manner that best suits their strong points | POSSU2 | 0.72 |
| In this organisation, employees can do their jobs in a manner that best suits their strong points | POSSU3 | 0.83 |
| In this organisation, people can use their talents | POSSU4 | 0.82 |
| In this organisation, people's job tasks are aligned with their strengths | POSSU5 | 0.86 |
| This organisation makes the most of people's talents | POSSU6 | 0.86 |
| This organisation ensures that people can apply their strong points in their jobs | POSSU7 | 0.87 |
| This organisation focuses on what people are good at | POSSU8 | 0.86 |
| **Perceived Organisational Support for Deficit Correction (POSDI)** | | |
| This organisation emphasises the development of employees' weak points | POSDI1 | 0.77 |
| In this organisation, employees receive training to improve their weak points | POSDI2 | 0.81 |
| This organisation focuses on people's areas of development | POSDI3 | 0.85 |
| In this organisation, people are required to work on their shortcomings | POSDI4 | 0.75 |
| In this organisation, development plans are aimed to better people's weaknesses | POSDI5 | 0.86 |
| In this organisation, people are expected to improve the things they are not good at | POSDI6 | 0.72 |
| In this organisation, performance appraisals address people's areas of development | POSDI7 | 0.71 |
| In this organisation, employees receive feedback regarding their limitations | POSDI8 | 0.72 |
| **Strengths-Use Behaviour (SUB)** | | |
| I actively look for job tasks I am good at | SUB1 | 0.64 |
| I use my strengths at work | SUB2 | 0.80 |
| In my job, I try to apply my talents as much as possible | SUB3 | 0.78 |
| I organise my job to suit my strong points | SUB4 | 0.82 |
| I draw on my talents in the workplace | SUB5 | 0.80 |
| At work, I focus on the things I do well | SUB6 | 0.64 |
| In my job, I make the most of my strong points | SUB7 | 0.78 |
| I capitalise on my strengths at work | SUB8 | 0.84 |
| I seek opportunities to do my work in a manner that best suits my strong points | SUB9 | 0.74 |
| **Deficit-Correction Behaviour (DCB)** | | |
| In my job, I concentrate on my areas of development | DCB1 | 0.79 |
| At work, I focus on developing the things I struggle with | DCB2 | 0.82 |
| I engage in activities to develop my weak points at work | DCB3 | 0.80 |
| In my job, I work on my shortcomings | DCB4 | 0.76 |
| At work, I seek training opportunities to improve my weaknesses | DCB5 | 0.70 |
| I reflect on how I can improve the things in my job I am not good at | DCB6 | 0.79 |
| In my job, I make an effort to improve my limitations | DCB7 | 0.81 |
| At work, I seek feedback regarding my areas of development | DCB8 | 0.73 |

was for the item: 'In my job, I make an effort to improve my limitations', with a loading of 0.81. Correlations between the factors show varying patterns: six correlations with values of 0.81, 0.48, 0.78, 0.52, 0.51 and 0.44 for Model 1, no correlations for the single factor Model 2, a correlation of 0.55 for the organisational versus individual Model 3, and a correlation of 0.84 for the strength-use versus deficit-correction Model 4. While Models 1, 3 and 4 all show good discriminant validity, Model 1 is the most detailed and discriminating between the various factors at the same time.

## Item bias and structural equivalence

Item bias and structural equivalence were tested to determine whether the SUDCO can be used across the three language groups. The fit indices of the multi-group CFA across the language groups are reported in Table 4 and the chi-square differences reported in the model comparison function are used to ascertain the level of equivalence across the groups. In CFA, the theoretical model is investigated to see whether it fits the data. Model 0 includes all four parameters where none of the parameters are constrained. In Model 1, only the weights are constrained, while in Model 2, parameters are constrained for weights and intercepts. In Model 3, parameters are constrained for weights, intercepts and structural covariances, while in Model 4, parameters for residuals, weights, intercepts and structural covariances are constrained. From the fit indices, it is clear that all four models fit the data well, but a closer look at changes in the chi-square that arise from adding constraints to the null model reveals that Models 3 and 4 create a significantly poorer fit ($\Delta\chi^2 = 191.52$; $\Delta df = 144$; $p = 0.01$ for Model 3 and $\Delta\chi^2 = 445.02$; $\Delta df = 210$; $p = 0.00$ for Model 4). Models 1 and 2 improve equivalence without compromising fit ($\Delta\chi^2 = 54.43$; $\Delta df = 58$; $p = 0.61$ for Model 1 and $\Delta\chi^2 = 135.35$; $\Delta df = 124$; $p = 0.23$ for Model 2), but the analyses show that Model 2 still adds meaningful constraint over Model 1 ($\Delta\chi^2 = 80.92$; $\Delta df = 66$; $p = 0.10$). The best-fitting model is Model 2 ($\chi^2 = 3169.13$; $df = 1591$; $\chi^2/df = 1.99$; $p = 0.00$; CFI = 0.92, RMSEA = 0.04, SRMR = 0.05).

## Working with Strengths Use and Deficit COrrection mean scores

The results indicated that items are consistent with acceptable Cronbach's alpha coefficients regarding POS for strengths use ($\alpha = 0.94$); POS for deficit correction ($\alpha = 0.94$); strengths-use behaviour ($\alpha = 0.93$); and deficit-correction behaviour ($\alpha = 0.93$). These are acceptable as the coefficient closer to 1 is considered a true score (Struwig & Stead, 2007).

The descriptive statistics reflecting minimums, maximums, means and standard deviations regarding the SUDCO scales

for the sample of Nguni, Sesotho and West-Germanic language groups are displayed in Table 5. The outer left column of Table 5 presents the three groups with separate entries for each scale per group. Presented in the table are the minimum and maximum scores, plus in the last two columns the means and standard deviations. When examining the scores, the following findings emerge: while the West-Germanic group shows generally higher scores on all four scales, within each group, the four scales show more or less the same pattern. In other words, the two behaviour scales show consistently higher mean scores than the two POS scales. This pattern indicates homogeneity in scores of the Nguni, Sesotho and West-Germanic groups in relation to the SUDCO scales.

In the present study, comparability and equal functioning of the four SUDCO scales were established for the three mentioned language groups. Thereafter, a series of regression analyses were done to apply the four scales to organisational parameters, in this case, age and organisational tenure. For each regression analysis, one of the SUDCO scale means was chosen as dependent variable, and age and organisational tenure as the independent variables. The dependent variables were entered in a stepwise fashion: first step, age and second step, organisational tenure. High correlation might be expected between the two dependent variables; therefore, this procedure allows the independent estimation of each variable's effect. In order to compare the two genders and

**TABLE 5:** Descriptive statistics for Strengths Use and Deficit COrrection sub-scales in the three language groups.

| Language groups | Factors | Minimum | Maximum | Mean | SD |
|---|---|---|---|---|---|
| Nguni | POS for strengths use | 1.00 | 7.00 | 3.83 | 1.53 |
| | POS for deficit correction | 1.00 | 7.00 | 4.34 | 1.47 |
| | Strengths-use behaviour | 1.00 | 7.00 | 5.37 | 1.23 |
| | Deficit-correction behaviour | 1.13 | 7.00 | 5.41 | 1.20 |
| West-Germanic | POS for strengths use | 1.13 | 7.00 | 4.09 | 1.57 |
| | POS for deficit correction | 1.00 | 7.00 | 4.63 | 1.54 |
| | Strengths-use behaviour | 1.89 | 7.00 | 5.61 | 1.17 |
| | Deficit-correction behaviour | 1.38 | 7.00 | 5.58 | 1.14 |
| Sesotho | POS for strengths use | 1.00 | 7.00 | 3.93 | 1.63 |
| | POS for deficit correction | 1.50 | 7.00 | 4.49 | 1.57 |
| | Strengths-use behaviour | 2.56 | 7.00 | 5.51 | 1.18 |
| | Deficit-correction behaviour | 2.13 | 7.00 | 5.60 | 1.25 |

SD, standard deviation.

**TABLE 4:** Fit indices of the multi-group confirmatory factor analysis across language groups.

| Model | $\chi^2$ | $df$ | $p$ | $\chi^2/df$ | CFI | RMSEA | SRMR |
|---|---|---|---|---|---|---|---|
| Model 0 | 3033.77 | 1467 | 0.00 | 2.07 | 0.92 | 0.04 | 0.05 |
| Model 1 | 3088.20 | 1525 | 0.00 | 2.03 | 0.92 | 0.04 | 0.05 |
| Model 2 | 3169.13 | 1591 | 0.00 | 1.99 | 0.92 | 0.04 | 0.05 |
| Model 3 | 3225.30 | 1611 | 0.00 | 2.00 | 0.91 | 0.04 | 0.06 |
| Model 4 | 3478.79 | 1677 | 0.00 | 2.07 | 0.90 | 0.04 | 0.06 |

$\chi^2$, chi-square; $df$, degrees of freedom; $p$, statistical significance; CFI, comparative fit index; RMSEA, root mean square error of approximation; SRMR, standardised root mean square residual.

three language groups, the analyses were done separately for a split-group focus: by gender (two groups), language (three groups) and the combination of gender and language (six groups).

The results for all of the regression analyses can be seen in Table 6. It is visible that the effects per group are split. The first block shows the effects of age: the main effect for the entire sample, the effect of age for males and for females, as well as for Nguni males, West-Germanic males, etc. The second block follows the same outline for organisational tenure, with the findings split into main effects and effects per gender and language group. The findings show that the effects of age are confined mostly to strengths and to females, both regarding POS and behaviour. The largest effects, in this case, are $\beta = 0.23$, $p < 0.01$ for POS strengths use and $\beta = 0.20$, $p < 0.01$ for strengths-use behaviour in Sesotho women, with West-Germanic women showing slightly smaller effects than the Sesotho women. Males only show a significant main effect for POS deficit correction, $\beta = -0.15$, $p < 0.05$.

Regarding organisational tenure, the effect of age is eliminated through stepwise regression procedure (with age as the first step and organisational tenure as the second step). The only significant effects in this case were found for strengths-use behaviour, both males and females showing a main effect ($\beta = -0.15$, $p < 0.05$ and $\beta = -0.15$, $p < 0.05$, respectively). While Sesotho males and females showed high coefficients (0.46 and 0.25) for organisational tenure in relation to strengths-use behaviour, this effect only reached significance for the males ($p < 0.05$). Taken as a whole, the three language groups thus show important and rather consistent functioning in terms of SUDCO scales, with two scales indicating only limited effects, and two other scales moderate effects. The results emphasise the relevance of a positive psychology for personal development, where the effects for strengths are persistently higher than for deficits.

# Discussion

The present study argues for a balanced and comprehensive approach to positive psychology, one which focuses on developing strengths and correcting deficits, at the level of both the organisation and of individual employees. This shift towards a balanced approach in the behaviour of personnel and the organisation (Seligman, 2002; Rust, Diessner & Reade, 2009) led to the development of the SUDCO (Van Woerkom et al., 2016). Therefore, as indicated previously, the objectives of the present study was to validate the SUDCO in a specific working sample of banking employees. This was done by examining bias and equivalence of the SUDCO across the diverse language groups: Nguni, Sesotho and West-Germanic. Thereafter, the study compared the functioning of the SUDCO within each language group regarding the variables of age, organisational tenure and gender.

The study commenced by validating the factor structure of the SUDCO, in comparing the hypothesised four-factor model with competing models. The analyses indicated that the hypothesised four-factor model provides a significantly better fit based on the fit indices and information criteria. These results are consistent with the research findings of previous studies (Els et al., 2016; Stander & Mostert, 2013; Van Woerkom et al., 2016).

Cross-cultural psychology investigates whether cultural differences may cause differences in behaviour and whether similarities can be found in psychological behaviour across cultures (De Klerk, 2008). Thus, in cross-cultural studies and psychometric assessments, the taxonomies of bias and equivalence are significant because they provide a theoretical framework to validate these requirements (Van de Vijver & Leung, 2011; Van de Vijver & Tanzer, 2004). In order to measure bias and consistency in meaning, the present study

**TABLE 6:** Strengths Use and Deficit COrrection scale behaviour: Results of the stepwise regression analysis with age, organisational tenure, gender and language group.

| Independent variable | Split group 1: gender | Split group 2: language | POSSU | | POSDI | | SUB | | DCB | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | $\beta$ | $\Delta R^2$ | $\beta$ | $\Delta R^2$ | $\beta$ | $\Delta R^2$ | $\beta$ | $\Delta R^2$ |
| Age | - | - | 0.12 | 0.02** | -0.01 | 0.00 | 0.13 | 0.02** | -0.02 | 0.00 |
| | Male | - | -0.04 | 0.00 | -0.15 | 0.02* | 0.08 | 0.01 | -0.07 | 0.01 |
| | | Nguni | 0.08 | 0.01 | -0.08 | 0.01 | 0.01 | 0.00 | 0.07 | 0.00 |
| | | West-Germanic | -0.03 | 0.00 | -0.13 | 0.02 | 0.13 | 0.02 | -0.16 | 0.02 |
| | | Sesotho | -0.09 | 0.00 | -0.19 | 0.03 | 0.05 | 0.00 | -0.01 | 0.00 |
| | Female | - | 0.18 | 0.03** | 0.04 | 0.00 | 0.15 | 0.02** | -0.01 | 0.00 |
| | | Nguni | 0.09 | 0.01 | -0.10 | 0.01 | 0.07 | 0.01 | -0.09 | 0.01 |
| | | West-Germanic | 0.20 | 0.04** | 0.05 | 0.00 | 0.15 | 0.02* | -0.02 | 0.00 |
| | | Sesotho | 0.23 | 0.05* | 0.12 | 0.01 | 0.20 | 0.04* | 0.04 | 0.00 |
| OrgTenure[a] | - | - | 0.06 | 0.00 | 0.05 | 0.00 | 0.15 | 0.01* | 0.04 | 0.00 |
| | Male | - | 0.06 | 0.00 | 0.05 | 0.00 | 0.15 | 0.01* | 0.04 | 0.00 |
| | | Nguni | -0.33 | 0.06 | -0.34 | 0.06 | -0.10 | 0.01 | -0.12 | 0.01 |
| | | West-Germanic | -0.15 | 0.01 | 0.06 | 0.00 | 0.09 | 0.00 | -0.01 | 0.00 |
| | | Sesotho | 0.07 | 0.00 | 0.01 | 0.00 | 0.46 | 0.09* | 0.23 | 0.02 |
| | Female | - | 0.06 | 0.00 | 0.05 | 0.00 | 0.15 | 0.01* | 0.04 | 0.00 |
| | | Nguni | 0.15 | 0.01 | 0.01 | 0.00 | 0.19 | 0.02 | 0.24 | 0.03 |
| | | West-Germanic | 0.14 | 0.01 | 0.05 | 0.00 | 0.11 | 0.00 | -0.12 | 0.01 |
| | | Sesotho | -0.19 | 0.01 | -0.05 | 0.00 | 0.25 | 0.02 | 0.07 | 0.00 |

[a], Corrected for effect of age: By means of a stepwise procedure, the effect of age is removed from that of organisational tenure, thus showing true effects of each.
*, $p < 0.05$; **, $p < 0.01$

investigated whether the theoretical model as a whole was consistent with the data sample from the population of the three language groups. The best-fitting model was Model 2, indicating that the instrument has the same internal meaning across the three mentioned language groups (Nguni, Sesotho, and West-Germanic). These findings are also congruent with those of Els et al. (2016), and Theron et al. (2015), who investigated bias and equivalence of the SUDCO in less comprehensive samples. Even though Model 4 did not show the best fit, this is not a problem as literature indicates that residuals do not have to be the same. In addition, the literature suggests that this is the most vigorous and adaptable approach to test invariance (Steenkamp & Baumgartner, 1998). These results indicate that the SUDCO items are not biased against any of the Nguni, Sesotho or West-Germanic language groups. It was found that the SUDCO functions similarly for the three language groups.

Analysis of the Cronbach's alpha coefficients indicated that the SUDCO is a consistent measure with values ranging between $\alpha = 0.93$ and $\alpha = 0.94$ for the different sub-scales. These results show that the SUDCO items will consistently measure the extent to which the bank is perceived to offer its employees organisational support for strengths use and deficit correction. In addition, these scales will measure consistently how the bank employees themselves behave or take the initiative in using their strengths or correcting their deficits. Similarly, Van Woerkom et al. (2016) and Stander and Mostert confirm Cronbach's alpha coefficients ranging between $\alpha = 0.89$ and $\alpha = 0.95$ for the four sub-scales.

Finally, the SUDCO showed meaningful relationships with demographic variables such as age and organisational tenure in each of the gender, language and gender by language groups. For this aim, a series of regression analyses were conducted. These analyses show that particularly the effects for the two strengths-use dimensions have significant coefficients, in which age and organisational tenure differ between the two. The moderating effect of gender was most visible for age and less for organisational tenure. More specifically, the effects of age related to strengths are stronger for women than for men.

This study contributes to the fair application of psychometric assessments in the South African workplace. As South Africa has 11 official language groups, it is suggested that future research should assess the bias and equivalence of the SUDCO with representatives of all language groups. The present study has dealt with these gaps in the literature, seeing that the researcher established bias and equivalence based on a sample of the three mentioned South African language groups.

## Limitations and recommendations

Although the present study does contribute to the field of psychology, certain limitations were noted, which are discussed subsequently. Firstly, the study focused on employees in the banking sector, where the population consists of employees with a minimum education of Grade 12. However, the South African employment landscape comprises employees from differentiated education levels, and consequently socio-economic levels, who are thus motivated by different factors. It is well documented that employees in the blue-collar sector need to make their ends meet (according to Maslow's hierarchy of needs) and are therefore predominantly motivated by remuneration, rather than personal development (Pink, 2010). On the contrary, employees with tasks involving cognitive skills, decision-making and creativity are more motivated to develop themselves in terms of strengths and unique work-related traits (Pink, 2010). It is thus recommended that future research focuses on bias with a sample of a diverse population, which includes people from the different sectors of the economy.

Secondly, while the findings on bias and equivalence are favourable, a limitation was noted on the effects for the dimensions of POS for deficit correction and deficit-correction behaviour. These two scales did not show significant coefficients for age and organisational tenure. While this finding could potentially be an important contribution to the literature, it may also reflect a characteristic of the small sample size: too small to have sufficient power for fruitful testing of significance. However, the two strengths scales do reach significance in the same samples, which suggests that non-significance does reflect the true relationships in the population. Nevertheless, to eliminate concerns about the power of statistical testing, future studies may employ larger sample sizes, just to make sure.

Thirdly, companies have to attend to the influx of people with diverse cultural profiles from the rural areas to the cities, as well as the educational and business systems that encourage the use of English. As a result, certain employees were not clear on what constitutes a home language and asked whether they were allowed to select more than one language. Future cross-cultural studies thus need to define how the population can be categorised into different languages, whether for the business environment, a home dialect or language based on the parental line or ethnicity, in order to make meaningful inferences. Therefore, 'language' needs to be defined in the cross-cultural context, for future studies that plan to investigate equivalence based on language groups.

Fourthly, the present study employed a cross-sectional design, where observations were made of a particular group at a specific period. In order to ensure equitable use of SUDCO, researchers may consider studies on predictive bias. This is based on the premise that any given score on the predictor should result in a similar level of performance for all study participants irrespective of their group membership (Kuncel & Klieger, 2012). Thus, people from a specific ethnic group (e.g. West-Germanic) who share similar characteristics (e.g. obtained the same rating in the job interview), should perform comparably (not necessarily equally) regardless of group membership.

Finally, in the cross-sectional design, observations were thus made at specific periods. Because this instrument is relatively new in the industry, to date, no documented longitudinal studies are related to this instrument. Longitudinal studies observe the same group of people or the same measure over an extended period (Goodwin, 2010). This help researchers identify changes in the variables of the sample at both individual and group level.

## Practical implications

The present research's findings have clear practical implications. Employees within the bank are exposed to management feedback, which traditionally focuses on performance management aimed at correcting deficits. These findings can empower employees with the knowledge and value of using a balanced approach, SBA's self-development initiatives. The value of adopting SBA is that employees become aware of their strengths, which increase their motivation and improve their performance in the work place.

From a practical point of view, demonstrating that strengths use can yield performance benefits, provide leaders and organisations the tools to manage employees' performance and thereby make the organisation more effective (Kong & Violet, 2016). In line with findings by Sorenson (2014), the present research showed the benefits of investing in employees' selection, strengths and well-being. Such investment may boost the results that companies would receive from increasing its engagement alone. In this regard, the study helps organisations understand their employees' strengths and deficits. This insight will guide companies in attracting, retaining and developing talent. In turn, this increases engagement, well-being, productivity, and maintains the bottom line. For example, employees that proactively attend to their own development of career-related skills and abilities have been shown to enhance their well-being (Plomp et al., 2016). The study further contributes to literature in this field, as numerous studies focus on either a strength-based approach or deficit improvement. Strength-based approaches are, for example, a historical reaction to an almost exclusive deficit focus (Wright, 2003), which led to a broad shift in focus to strengths (Van Woerkom & Meyers, 2014). There is a gap in literature and instruments that provide a balanced approach, which measures both strengths use and deficit correction in the same study.

Furthermore, the significance of the present study is pivotal, by ensuring that the principles of fairness, inclusivity and equity are observed in the organisation (Foxcroft & Roodt, 2009; Robbins, Judge, Odendaal & Roodt, 2009). The research contributes to the organisational psychology profession by aiming to validate reliability, bias and structural equivalence of the instrument. The research findings will provide evidence, which may be relevant for the classification of the SUDCO as a legally recognised psychological instrument to be applied in the South African context.

## Conclusion

Literature proved to be limited with regard to knowledge on positive organisations (Gable & Haidt, 2005). The present research responds to a renaissance of positive psychology as a field that is not limited to the development of strengths, but finding the balance between both strengths and weaknesses (Kaiser & White, 2008; Seligman et al., 2004). A positive focus on strengths within measures of personnel development makes a substantial contribution to organisations' attempt at keeping their employees on top of their game and committed to their company. The SUDCO shows good evidentiary support for helping managers in the South African workplace to achieve excellence.

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# Managing employee well-being: A qualitative study exploring job and personal resources of at-risk employees

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**Orientation:** Job and personal resources influence the well-being of employees. Currently, limited information exists in literature surrounding the experience of these resources in employees identified as at-risk of burnout.

**Research purpose:** To investigate the experience of job and personal resources from the perspectives of employees identified as at-risk of burnout.

**Motivation for the study:** Empirical evidence on the integrative role and influence of job and personal resources on the well-being of employees in the South African context is currently limited. Attaining a better understanding of the manner in which at-risk employees experience resources can empower organisations to actively work towards creating an environment that allows for optimal employee well-being.

**Research design, approach and method:** A phenomenological approach was taken to conduct the study in a South African-based financial services organisation. A combination of purposive and convenience sampling was used, and 26 employees agreed to participate. Semi-structured interviews were used to collect data, and data analysis was performed through the use of thematic analysis.

**Main findings:** Employees identified as at-risk of burnout acknowledged both job and personal resources as factors influencing their well-being. Participants in this study elaborated on received job resources as well as lacking job resources. Information was also shared by participants on personal resources through describing used personal resources as well as lacking personal resources.

**Practical/managerial implications:** Knowledge gained from the study will contribute to empower organisations to better understand the impact of resources on the well-being of employees, and allow organisations to adapt workplace resources to ensure adequate and appropriate resources to facilitate optimal employee well-being.

**Contribution:** This study contributes to the limited research available in the South African context regarding the experience of job and personal resources from the perspective of at-risk employees. The study may also enable organisations to create a workplace that is more supportive and empowering with appropriate resources to deliver on expected demands.

## Introduction

Employees are faced with the reality of having to deal with various job and life demands on a daily basis and are continuously required to find ways to cope with these demands (Thuynsma & De Beer, 2016). Employees become burnout risks and burned out as a result of high demands that exhaust physical and mental resources and lead to a depletion of energy (Bakker, Demerouti & Sanz-Vergel, 2014), through a process widely referred to in literature as the health impairment process (Schaufeli & Taris, 2014). Burnout in the work context can be described as a psychological syndrome comprising exhaustion, depersonalisation or cynicism, and reduced personal accomplishment in response to chronic work-related strains (Maslach, Schaufeli & Leiter, 2001). However, evidence is accumulating that reduced professional accomplishment plays a more divergent role as compared to exhaustion and cynicism (De Beer & Bianchi, 2017), which were previously indicated as the core components of the burnout syndrome (cf. Schaufeli & Taris, 2005). In order to support employees in dealing with the various demands experienced, and to prevent burnout from occurring, organisations should strive towards providing resources that will support employees in delivering upon expectations.

The job demands–resources (JD-R) model is a theoretical framework used to understand the impact of demands and resources on the well-being of employees (Schaufeli, Bakker& Van Rhenen, 2009). The model assumes that employee health and well-being result from a balance between positive (job resources) and negative (inordinate job demands) job characteristics and identify two processes, that is, the *health impairment process* of burnout (as referred to above) and a *motivational process* (Bakker & Demerouti, 2007). The motivational process highlights the availability of job resources that leads to work engagement and organisational commitment (Schaufeli & Bakker, 2004). However, job resources also have a buffering effect on job demands and the burnout process itself (Bakker et al., 2014). According to Schaufeli and Bakker (2004), job resources can be explained as the physical, psychological, social or organisational aspects of the job that (1) are functional in achieving work goals, (2) reduce job demands and the psychological and physiological costs associated therewith or (3) encourage personal growth and learning. Previous studies have found job resources to have positive relationships with work engagement (e.g. De Beer, Rothmann & Pienaar, 2012; Schaufeli & Bakker, 2004), as well as negative relationships with burnout (Crawford, Le Pine & Rich, 2010). Job resources therefore play a motivational role as they foster employees' growth and development, and support the achievement of work goals (Schaufeli et al., 2009). Nahrgang, Morgeson and Hofmann (2011) found job resources (knowledge, autonomy, supportive environment) to motivate employees and impacted positively on work engagement. Job resources can also affect employee well-being states negatively if unavailable, similar to the impact that job demands may have – the lack of a needed job resource can therefore function similarly as a job demand (cf. Bakker & Demerouti, 2007).

## Research purpose

Studies on the JD-R model have mainly focused on work characteristics (job demands and job resources), and the role of employees' personal characteristics (personal resources) as important determinants of burnout has been largely neglected (Huang, Wang & You, 2016; Xanthopoulou, Bakker, Demerouti & Schaufeli, 2007). It is important to also consider the impact and role of personal resources on the experience of well-being of employees identified as at-risk of burnout as they provide additional sources of coping that individual possess (or lack). Hobfoll, Johnson, Ennis and Jackson (2003) described personal resources as elements of the self that are generally linked to resilience and point to individuals' sense of ability to control and impact upon their environment successfully. A study on the role of personal resources showed that self-esteem and optimism influence the health impairment process, and optimism also influences the motivation process (Huang et al., 2016). Buruck, Dörfel, Kugler and Brom (2016) investigated the role of emotional regulation skills as personal resources in enhancing well-being at work and found that well-being can be improved by training on specific personal resources.

Organisations have a responsibility towards the organisation and also to the needs of the employees in order to attempt to reduce distress and prevent the occurrence of burnout. This qualitative study aimed to explore the resources of employees identified as at-risk of burnout from their perspective. This knowledge will empower organisations to potentially adapt the workplace resources to ensure adequate and appropriate support to employees in an attempt to reduce and prevent the occurrence of burnout through the effective managing of these risks.

## Literature review

### Job resources and employee well-being

The effect of job resources on the well-being of employees is often described in literature by highlighting the impact thereof on the health impairment and motivational processes, within the context of the JD-R model (Bakker & Demerouti, 2007; Schaufeli et al., 2009). The JD-R model is considered to be a leading job stress model in literature for a variety of reasons, one of them being that it does not restrict itself to specific job demands or job resources, but assumes that any demand and any resource may affect employee well-being (Schaufeli & Taris, 2014). In previous research studies, job resources have been represented by a variety of different concepts, including advancement, appreciation, financial rewards, goal clarity, information, job challenge, leadership, opportunities for professional development, participation in decision-making, procedural fairness, quality of relationship with supervisor, social support from colleagues, social support from supervisor, supervisory coaching, task variety and team cohesion (Schaufeli & Taris, 2014).

Job resources are positively valued and fulfil basic psychological needs, such as the need for autonomy, competence and relatedness – in line with self-determination theory (Bakker, 2011). Several studies have shown job resources (e.g. autonomy, performance feedback, opportunities for development and social support) to mitigate the impact of job demands on strain, including burnout (Schaufeli & Bakker, 2004; Schaufeli & Taris, 2014; Xanthopoulou et al., 2007). Ten Brummelhuis, Ter Hoeven, Bakker and Peper (2011) examined burnout as a longitudinal process and found a decrease in job resources (social support at work, job autonomy, participation in decision-making, information) to play a significant role in the increase in baseline burnout over a 2-year period. A study by De Beer et al. (2012) also found a negative relationship between job resources (growth opportunities, supervisor and colleague support, role clarity and communication) and burnout within the South African context, indicating that job resources are important in the buffering of burnout.

The availability of job resources allows employees to better cope with the demands experienced in the workplace and contribute to improved employee well-being. In a systematic review of literature, Nieuwenhuijsen, Bruinvels and Frings-Dresen (2010) confirmed the potential of preventing stress-related disorders by improving the psychosocial work

environment, for example, evidence was found that low job control, low co-worker support, low supervisor support, low procedural justice and low relational justice predicted the incidence of stress-related disorders. This also supports the notion that a 'lack of job resources' contributes to demands experienced by employees.

Job resources have been found to have an important influence on work engagement (Schaufeli & Bakker, 2004). Work engagement has been positioned in literature as the positive antipode of burnout and is defined as a 'positive, fulfilling, work-related state of mind that is characterised by vigour, dedication, and absorption' (Schaufeli & Bakker, 2004, p. 295). Engaged employees identify with their work and view it as challenging; they are willing to invest extra effort and have a sense of energetic and effective connection with their work (Bakker et al., 2014). This motivational process is strongly driven by the availability of job resources; these resources contribute to employees' growth and development and through being instrumental in achieving work goals (Schaufeli et al., 2009).

A study by Bakker (2011) posits that job and personal resources are the main elements influencing work engagement and highlights that these resources gain their salience in the context of high job demands. The study also underlined the value of highly engaged workers by pointing out that they tend to be more productive, more open to new information and more willing to put in extra effort, all of this being likely to contribute to the success of the organisation. In a meta-analytical study by Nahrgang et al. (2011), job resources were found to motivate employees and related positively to work engagement; a supportive work environment was also found to be the most consistent job resource in terms of explaining variance in burnout, engagement and safety outcomes measured in the study. Job resources have also been found to lead to organisational commitment through work engagement within the South African context (De Beer et al., 2012). Therefore, job resources have a dual functionality: supporting (buffering) employees' demands and impacting positively on motivation (positively on work engagement and negatively on burnout) and organisational outcomes (e.g. commitment, performance and retention).

**Personal resources and employee well-being**

It is important to recognise and consider the influence of both job resources and personal resources on the experiences of well-being from the perspective of employees, as research on burnout from the viewpoint of personal resources has remained scarce (Garrosa, Rainho, Moreno-Jiménez & Monteiro, 2010).

Personal resources are typically described in literature as positive self-evaluations that are associated with resiliency and the individuals' sense of their ability to control and impact upon their environment successfully (Hobfoll et al., 2003). Such positive self-evaluations tend to contribute to goal setting, motivation, performance, job satisfaction, life satisfaction and

other desirable outcomes (Judge, Van Vianen & De Pater, 2004). Personal resources have been represented by different concepts in the literature, for example, emotional and mental competencies, hope, intrinsic motivation, need satisfaction, optimism, organisation-based self-esteem, resilience, self-efficacy and value orientation (Schaufeli & Taris, 2014). Ouweneel, Le Blanc and Schaufeli (2012) conclude that personal resources, in the context of work, represent the positive cognitive evaluations of one's future in work (i.e. hope and optimism) and of oneself as an employee (i.e. self-efficacy), which can influence how engaged employees are. Schaufeli and Taris (2014) also state that personal resources matter, but that we need to be cognisant of the fact that different types of explanatory models can be used to specify the role of personal resources. Xanthopoulou et al. (2007) investigated the role of personal resources (self-efficacy, organisational-based self-esteem and optimism) in the JD-R model and found personal resources to influence the relationship between job resources and work engagement, suggesting that job resources may also foster the development of personal resources. A study on work–life spill over and crossover effects has also shown home resources to have a positive influence on job performance (Demerouti, Bakker & Voydanoff, 2010).

Various 'coping strategies' are applied by individuals as means of personal resources supporting them in dealing with demands experienced in the workplace. A study by Garrosa et al. (2010) provides evidence that when adequate coping strategies are adopted, burnout levels are more likely to reduce. In the aforementioned study, social support, active coping and avoidance were included as types of coping strategies; active coping and social support were found to be negative predictors of burnout dimensions, and active coping had an inverse temporal effect on depersonalisation and lack of personal accomplishment (Garrosa et al., 2010).

In a study exploring informal social support structures and relationships, Huynh, Xanthopoulou and Winefield (2013) investigated the effect of non-work resources (e.g. family or friend support) on the relationship between firefighters' volunteer demands (emotional demands and work–home conflict) and burnout and organisational connectedness. Results of the study indicated that family or friend support buffered the relationship between volunteer demands and organisational connectedness. Specifically, results indicated that when volunteer firefighters were confronted with emotionally charged situations and did not receive family or friend support (lacking resources), it was harder for them to stay connected to volunteering. The study further showed that high levels of family or friend support may turn the negative relationship between emotional demands and organisational effectiveness into a more positive one. These results are important as it suggests that support from family and friends (received resources) is critical in coping with demands and may protect from burnout, while helping them to stay connected to volunteering. A study focused on family-to-work conflict also found non-work resources that stem from both the family (e.g. spouse support) and community (e.g. friend support) to complement work resources in

increasing family-to-work facilitation (a form of synergy in which resources associated with one role enhance or make easier participation in the other role) (Voydanoff, 2005).

The impact of personal resources on the well-being of employees has been less researched than the impact of job resources on well-being, specifically also within the South African context. Sánchez-Moreno, Roldán, Gallardo-Peralta and de Roda (2014) highlight the value that will be added by qualitative research designs to allow for an improved understanding of the experience that individuals themselves have of burnout. This study set out to contribute towards this need, making use of a qualitative research approach to add to the body of knowledge in understanding the experience of both job and personal resources, both received and lacking, from the viewpoint of employees identified as at-risk of burnout.

# Research methodology

The research method consists of the research approach, research setting and sample, entrée and establishing researcher roles, procedure, data collection, data recording, strategies employed to ensure data quality and integrity, data analysis and reporting style.

## Research approach

A qualitative research approach was followed in this study. Qualitative research is oriented to collect data that provide contextual information and contribute towards creating a deeper understanding of the phenomena (Sanders, Cogin & Bainbridge, 2014); qualitative research is interested in understanding how people make sense of the world and how they experience events (Willig, 2013). In this study, it allowed the researcher to explore the experience of resources and the influence thereof on burnout from the viewpoint of employees identified as at-risk of burnout.

A phenomenological approach helped the researcher to make sense of everyday experiences without pre-supposing knowledge of those experiences (Converse, 2012). The researcher in this study applied deliberate effort to keep an open mind and to remain objective in order to understand the experiences shared by participants from their points of view.

The social constructivism paradigm guided the researcher to consider the specific context within which people lived and worked, and to make sense of the views participants constructed in their minds (Creswell, 2013).

## Research setting and sample

The research setting for this study was a specific business unit or division of a South African-based financial services organisation. The particular business unit went through a period of significant changes and consequently made the decision to roll out a climate survey across the specific business unit as part of a diagnostic process to understand how

employees were doing and to identify vital areas that should be focused on as part of the people management strategy for the division. The particular business unit had a headcount of approximately 300 employees who were appointed in departments ranging across various functional areas including operational call centres (e.g. claims, client services and sales) as well as support departments such as actuarial, information technology, finance and human resources. Roles in the business unit ranged from operational positions (e.g. call centre advisors) to senior management. The office of the particular business unit is based in Gauteng province in South Africa, and all interviews were conducted in the office building of the particular division. To ensure privacy and convenience for all, private meeting rooms were booked for the interviews.

## Entrée and establishing researcher roles

As the researcher formed part of the organisational development team who implemented the annual climate surveys (2014–2015) in the business unit, the first role of the researcher was that of planner. This required the researcher to plan how the data were going to be collected, the sampling techniques to be used, as well as planning around aspects of data analysis. The researcher took care to ensure that all of this was done with the necessary support and approval from top management in the business.

The researcher also played the role of interviewer, active listener and facilitator during the discussions. The researcher prepared for the interviews by creating an interview guideline to use throughout all of the interviews and by reading through the individual human factor benchmark feedback reports of the individuals. The researcher was also responsible for sending through referrals for the Employee Assistance Programme (EAP) in instances where further support was required from a clinical psychologist and/or other relevant professionals.

Next, the researcher together with two co-coders (in the same field of study) fulfilled the role of gathering, analysing and interpreting the data. This was done to ensure that the experiences of participants were presented in an accurate and truthful manner. The final role played by the researcher was that of report writer. The researcher was responsible for writing up and presenting the data in a scientific manner in the form of a research article. The researcher took care throughout this process to not let her own beliefs, values and experiences influence the interpretations formed and findings derived during the study (Creswell, 2013).

## Procedure

For the purpose of this study, a combination of purposive and convenience sampling was used. Purposive sampling entails a random selection of sampling units within the segment of the population with the most information on the characteristic the researcher wants to study (Guarte & Barrios, 2006). In this study, participants were selected who were identified as being at-risk of burnout through the use of

the annual organisational climate survey, within the business unit where the study was conducted. Convenience sampling is a popular sampling technique and was used in that participants were selected based on their accessibility and/or proximity to the research (Bornstein, Jager & Putnick, 2013). The Organisational Human Factor Benchmark (OHFB; Afriforte, 2013) survey is a normed survey for the South African context, based on at least 50 000 employees in South Africa from various economic sectors. The survey was completed online through a secure encrypted connection by all participants. The OHFB system compares the results of participants to the OHFB's South African norm in order to determine employees' burnout risk level; this happens automatically as soon as an individual has completed the survey. Upon completion of the survey, participants were asked to grant permission to the organisational development team (of which the researcher formed a part) to access their results and to contact them to discuss their results. If permission was granted, high-risk participants were contacted based on the employee number provided.

In this study, 49 employees were identified as at being at high risk of burnout through the OHFB survey, 34 of those employees granted permission for their results to be accessed by the organisational development team and a total of 26 employees agreed to participate in an interview. Participants completed a questionnaire to provide biographical information in terms of race, gender and age. The majority of participants were white people (50%), with 27% being Africans, 19% Indians and 4% mixed race. Just over half of participants were female (54%), with 46% being male. The majority of participants were between the ages of 25 and 35 years (65%), whereas 12% were younger than 25 years, and 23% were between the ages of 36 and 45 years. The researcher was satisfied that the participants were representative of a diverse population group in terms of race, gender and age.

## Data collection

The researcher started with three pilot interviews to determine the appropriateness of the research questions and to ensure comprehension of all questions by participants. Once the suitability of the interview questions was confirmed, the researcher proceeded with the rest of the interviews. The interviews were semi-structured in nature which created flexibility and allowed the researcher freedom to seek clarification on matters that arose during the discussion (Doody & Noonan, 2013). The interview guideline used by the researcher in the interviews is presented below, and it reflects the interview questions as well as sub-questions (probing questions) used in the interviews. The sub-questions served to probe for further detail and richness in responses from participants where it was required.

Question 1:
- What resources in your work environment play a role to contribute to your well-being?
- What support are you currently receiving in the workplace and from whom?

- What support would you have liked to receive in the workplace that you are currently not getting?
- Are there things happening in the work environment that helps you to cope better when there is a lot expected of you?
- Are there things that you would have liked to happen or be available in the work environment as it would have helped you to cope better with all the demands?

Question 2:
- What resources in your personal life play a role to contribute to your well-being?
- What are you currently doing to help you cope better with the demands expected off you?
- What action or actions can you take to help you improve your well-being when things are tough?
- What support are you receiving or not receiving which impacts your well-being?

## Recording of data

During the semi-structured interviews, the researcher took detailed notes of the perspectives and experiences shared by the participants. The researcher was guided by her previous experience of such interviews and was conscious of the sensitive nature of the topics being discussed, which consequently led to the decision not to use an electronic recording device to record the interviews with participants. De Vos, Strydom, Fouché and Delport (2005) emphasise the importance of data recording strategies fitting the setting and sensitivities of the participants. As a result, the focus was on recording data by means of detailed note-taking. Upon completion of each interview, the researcher took care to transcribe the detailed notes captured during the interview on a secure (password protected) electronic (Microsoft Excel) spreadsheet. At the end of each interview, the researcher confirmed that the notes captured was an accurate reflection of what the participant meant when answering the questions. This served to confirm accuracy of the notes captured, as well as to emphasise the availability of further support to participants, should it be required.

## Data analysis

A thematic analysis (TA) approach was followed to recognise and analyse patterns of content and meaning in the data set (Braun & Clarke, 2006; Willig, 2013). TA is a method well suited to varying needs and requirements of research projects, including health and well-being research (Braun & Clarke, 2014). The researcher followed the six steps of TA as identified by Braun and Clarke (2006) to analyse the data for this article.

### Step 1: Familiarisation with the data
As part of the data collection, all interviews were transcribed in an electronic (Microsoft Excel) spreadsheet, which formed one large data set that the researcher consulted during the data analysis phase. In order for the researcher to become intimately familiar with the data, she allowed herself

adequate time to read and re-read through the text. The focus on familiarisation with the data made it possible for the researcher to start noting initial analytic observations which were relevant to the research question (Clarke & Braun, 2014).

### Step 2: Coding

The process of coding involves working through the text line by line to identify units of meaning and labelling these with a code that captures the meaning identified (Willig, 2013). The researcher and two co-coders (from the same field of study at PhD level) went through a process of manually coding the data to ensure that suitable and accurate codes were identified. In order to achieve this outcome, equal attention was given to all raw data, and the researchers double checked the coding process to ensure correctness and efficiency of coding (Braun & Clarke, 2006). The researcher and co-coders were cautious to ensure that each data item in the data set was coded, and data that may seem insignificant at the time were not disregarded.

### Step 3: Searching for themes

During this phase, the researcher and co-coders actively applied own analytical judgement to search for themes that were significant and meaningful to answer the research questions (Braun & Clarke, 2006). By reviewing responses from participants pertaining to the two identified categories (job resources and personal resources), the researcher and co-coders were able to identify themes and sub-themes. Keywords describing sub-themes were also noted in a separate document, as the researcher proceeded through analysing the data.

### Step 4: Reviewing themes

During this step, the researcher reviewed all the themes originally identified to confirm that it 'talks' to the coded data as well as to the entire data set (Clarke & Braun, 2014). Each theme was reviewed in order to ensure that it creates insight about the data, and in cases where it was required, the researcher made changes, for example, collapsed and split themes. The researcher also worked on defining the boundaries of each individual theme. To finalise this phase, the researcher read through the complete data set one more time to ensure that the process of reviewing themes was satisfactory and that all responses were coded. The final set of themes was confirmed before the researcher moved to defining and naming the themes.

### Step 5: Defining and naming themes

Themes were further refined by conducting and writing a detailed analysis of each theme (Braun & Clarke, 2006) to capture the 'essence' of each theme and to show how it relates to other themes (Clarke & Braun, 2014). The researcher worked on identifying the crucial aspects comprising each theme and wrote up a detailed analysis and definition for each theme (see findings). The researcher also refined the sub-themes and finalised the descriptive key words for each sub-theme during this phase. Lastly, a clear and explanatory name was formulated for each theme.

### Step 6: Writing up

In this phase, the researcher clearly and accurately wrote up the data to explain her findings to the reader through a logical and systematic manner. The researcher combined the analytical narrative research method and used a data abstract to contextualise the findings and to strengthen the validity of the interpretations (Clarke & Braun, 2014).

## Strategies to ensure quality data

For this study, the researcher was guided by the constructs of credibility, dependability, transferability and confirmability to prove trustworthiness (Guba, 1981).

### Credibility

Credibility is similar to internal validity in quantitative terms and is achieved by checking for the representativeness of the data as a whole (Thomas & Magilvy, 2011). The researcher established credibility through sharing the notes captured with participants and ensuring that participants recognise the findings and confirm the accuracy and truthful representation thereof. The researcher also made use of co-coders within the field of Industrial Psychology to ensure that the experiences of participants were captured and presented in an authentic manner.

### Transferability

Transferability refers to the ability of research findings or methods to be transferred from one group or setting to another (Thomas & Magilvy, 2011) and is equivalent to external validity in qualitative research (Lincoln & Guba, 1985). In this study, the researcher established transferability through thoroughly and methodically describing the context and population being studied, as well as the process of data collection, data analysis and writing up of the findings. This detailed and vigorous presentation of the research context, process and findings contributes to establishing transferability.

### Dependability

The researcher meticulously noted the purpose of the study, how participants were selected to form part of the study, the process of data collection and analysis, as well as the interpretations of the research findings (Thomas & Magilvy, 2011). This allowed the researcher to ensure a logical and consistent process was followed throughout the study. It also contributed to creating a clear audit trail that could be followed by future researchers to repeat the study.

### Confirmability

Confirmability refers to the traditional concept of objectivity (De Vos et al., 2005) and requires a conscious effort on the part of the researcher to follow rather than lead the direction of the interview. Throughout the study, the researcher actively focused on remaining open to the study and unfolding results, and to not let her own preconceptions and beliefs influence the results of the study (Thomas & Magilvy, 2011). It remained an objective for the researcher throughout

the study to authentically capture and present the perspectives of participants shared in the study.

## Reporting style

A table format was used to report the themes as well as the sub-themes for both the categories identified, namely job resources and personal resources. A column containing descriptive keywords was also included in the tables to allow for an enhanced understanding of the data and to add to clarity for the reader.

## Ethical considerations

In order to ensure that this research project was handled in an ethical manner and that the dignity, rights and well-being of participants were considered, the project was guided by the following principles: privacy and confidentiality; voluntary participation, informed consent, do no harm; and data security.

# Findings

The purpose of this study was to explore resources from the viewpoint of employees identified as at-risk of burnout. Categories, themes and sub-themes were used to structure the findings of this study. Descriptive keywords were also included to further support the findings of the study. Results were divided into two categories. Category 1 includes job resources, whereas category 2 reflects personal resources. Tables were used to present themes, sub-themes and descriptive keywords within each category (refer Tables 1 and 2).

## Category 1: Job resources

Two main themes were recognised within category 1: (1) Received resources and (2) Lacking resources. Various sub-themes were identified under each of the two main themes. The sub-themes within *received job resources* were as follows: career opportunities, coaching, colleagues support, communication, leave, referral (professional support) and supervisor support.

**Career opportunities:** Participants perceived job resources in the opportunities to move from one department to another, as well as through gaining on-the-job experience (this was obtained through the opportunity to accompany an expert in the field and observe and learn what this specialised role entailed). This exposure provided participants with new knowledge and insights that positively contributed to their career development journey.

**Coaching:** Participants experienced coaching as a job resource through experiential learning which provided them with the opportunity to obtain knowledge in a desired professional field, through the support and guidance from a subject matter expert. Coaching was also experienced by

**TABLE 1:** Job resources.

| Theme | Sub-theme | Descriptive keywords |
| --- | --- | --- |
| Received resources | Career opportunities | Moving from one department to another; accompanied expert in the field on surveys to get some exposure. |
| | Coaching | Reflect on three things to do next year; put a personal development plan in place and to work on it to address the gaps; trying strategies with coach; identified two colleagues that need to have crucial conversations with; speak to team manager who can help address the issue; make a deliberate effort to contribute at the larger forums (and contract with his or her colleagues or team manager for support); 'helicopter' coaching; take responsibility for part in relationship; committed to changing; assist with experiential learning; refrain from negative internalisation; better stakeholder expectation management; pairing up with 'buddy' who can become reality check; have a clarification and expectation discussion with team manager; shadow coaching; committed to not delaying delegation; following up; reduction of overtime; discussed moving from one department to another. |
| | Colleague support | Had to ask for alot of assistance from team members; relationship in the team improved a lot. |
| | Communication | Received clarity on the future of automation. |
| | Leave | Take some leave; negotiate with team manager for time off; on leave from next week. |
| | Referral (professional support) | Requested referral to see someone; has a need to see a psychologist; meet with a psychologist to get support on an emotional level; see a psychologist to help unpack everything and get support on high levels of stress; seeing someone to give guidance and to provide tools on how to deal with challenges; marriage counselling and weekend breakaways; details of wellness provide; psychologist for therapy; need to see a psychiatrist also; expressed thanks for the time taken to follow up on survey results; gratitude and thankfulness to the company for the care and support provided; admitted that feels lighter because of knowing had to do something but that it helps having someone else help realise what that is. |
| | Supervisor support | Has a good relationship with team manager and all other managers in the department; support from team manager; support from manager (discussion if unsure and guidance); team manager very supportive and tries to alleviate emotional burden; team manager helps to create some structure into way of work as to not get overwhelmed; ask for assistance from team manager; comfortable to speak to manager; in a better space with direct manager; shared with head of area that will assist in looking into and assisting with issue. |
| Lacking resources | Colleague support | Colleague has a problem with everyone and everything; certain people do not carry their weight and they only are accountable for themselves and feel nothing towards the business; negative impact of that colleague relationship; frustrated at colleagues; impacts interaction. |
| | Communication | Applied for position and have not received feedback; things constantly change in the department, do not get communicated properly; feels disconnected from business decisions that are taken. |
| | Financial assistance (studies) | Applied for study assistance years ago, was not approved. |
| | Growth opportunities | More skilled and is doing the same job as rest of call centre employees in spite of this; moved into automation, thought progressing but constantly being pulled back; thought of leaving department but no positions available; not getting support for career growth as would have expected; perception of stagnated growth and development. |
| | Leave | Taking leave is difficult, have to take calculated risks of when one can take leave so that it will not affect performance negatively; did not have an opportunity to take leave last year. |
| | Management style | Perception that team manager allows certain misconduct; when manager says it is open to give feedback and engage, that it is a lie and it is taken by management as a complaint or negatively. |
| | Recognition | Sometimes feels the nature of the job is that it is not appreciated and recognised. |
| | Role clarity | No clarity with regard to roles and responsibilities. |
| | Supervisor support | Team manager sees us struggle with conversion and 6 months down the line has not helped; does not have a good relationship with team manager. |

**TABLE 2:** Personal resources.

| Theme | Sub-theme | Descriptive keywords |
|---|---|---|
| Used resources | Affective coping | Love the company; feels coping fine; love being here. |
| | Behavioural coping | Sought professional support from a psychologist; start putting healthy habits in place like going to the gym and spending time on hobbies; will also extend his or her hand and ask friends and family for help; made changes in personal life, moving to a smaller apartment to address financial problems and save where possible; wanted to go off medication and has stopped using it with guidance of house doctor; requested contact details of employee assistance provider; currently under debt review, company that is used is, however, not doing everything that they need to; currently on medication prescribed by doctor, was struggling to sleep and medication is helping for this; started to exercise and taking supplements to help with energy levels; will appreciate having discussion with someone to give guidance; started to exercise, trying to live a healthy lifestyle and balance work and life; seeing someone that can give some advice on dealing with finances but also coping with the pressure and deal better with challenges and stress experience; might be returning to work after annual leave to resign, if finding something else; considering moving out of corporate environment; start making time for herself to ensure that she has sufficient energy recovery; creating a connection between father and daughter; does not want to leave company but leave department; thinking daily about leaving or resigning; made the decision to stop working switched off mails; decided to move to another department; close to leaving the business; busy exploring treatment options with a doctor; dealing with what needs to be dealt with; started to exercise; praying a lot about what and how that picture should look; have open discussions with each other about matters; believes the problem is with oneself. |
| | Cognitive coping | Using time off to reflect on own needs; is coping and does not feel the need to have a discussion; coping fine; stops from thinking that it is own fault; learning to understand triggers and knows when to reign back in; realised that it is necessary to distance oneself because of the impact; realises that it will continue; made a concerted decision to not work overtime anymore; dealing with all changes positively; admitting over-commitment because does not want to let the business down; adamant about managing his or her current situation; looking forward to the new year; feels that things started to turn around and getting better; starting to cope better; things are much better; comfortable that spouse will find another job. |
| Lack of resources | Affective coping | Struggling to manage emotions; despondent; freaks out when feeling out of control over the day or feelings of finances; internalises when things go wrong wherein it becomes own fault and beats oneself up over it; on the verge of breakdown; feeling depressed (suicidal); world comes crashing down when feels like failing. |
| | Behavioural coping | Admits that does not do much for oneself; impacts the structure of how things are done; signs of presenteeism; behaving differently; procrastinates on tasks; started working while on sick leave; deliberately quiet as result of what people might think; avoids interacting with people and just keeps head down. |
| | Cognitive coping | Impacted on ability to cope; hates coming to work; acknowledges that there are things that no one can help with; believes it will be difficult as this is not who the person is; questioning own competence and value-add; does not understand why identified as at-risk. |
| | Support structures | Family and support structure mainly in other city; can have open discussions with each other (spouses) but do not feel that anything changes; in-laws work full time and offer little or no help, parents are in another city; does not ask for help from friends. |

participants through assistance provided to help them to apply techniques to reframe negative thought patterns and encourage them to engage in constructive conversations aimed at resolving areas of concern. Sharing of advice and input around effective management of expectations held by stakeholders was also experienced by participants as coaching. Additional keywords used to describe coaching included establishing a personal development plan to address gaps, 'helicopter coaching' and shadow coaching.

**Colleague support:** This support was experienced in asking team members for assistance when an employee was new in a role or required assistance with understanding how everything works. Participants also experienced colleague support as a job resource through improved relationships in the team.

**Communication:** Communication was experienced as a resource as it aided in creating clarity around business decisions. Thus, the organisation ensured the effective and efficient flow of information to different departments and teams.

**Leave:** The opportunity to take leave and to have some time off from work was experienced as a job resource by participants.

**Referral (professional support):** Participants experienced the availability of professional support as a job resource. This included requests to see a psychologist for support on an emotional level, to help unpack everything, to obtain support on high levels of stress, to receive guidance on how to deal with challenges and marriage counselling. Participants also expressed gratitude and thankfulness to the company for the care and support provided.

**Supervisor support:** This type of support included good relationships with supervisors and managers. Participants

experienced managers as supportive and trying to alleviate emotional burdens, and commented on being comfortable to speak to their managers.

The *second theme* identified within the category of job resources was *lacking job resources*. Sub-themes under lacking resources included colleague support, communication, financial assistance (studies), growth opportunities, leave, management style, recognition, role clarity and supervisor support.

**Colleague support:** Participants experienced a lack in resources through the negative impact of colleague relationships; this included occurrences of people not carrying their weight and being accountable only for themselves and not caring about the business.

**Communication:** Feelings of being disconnected from business decisions that are taken and poor communication around changes in the department impacted upon communication and contributed to lacking resources.

**Financial assistance (studies):** The rejection of the application for study assistance (financial) was experienced.

**Growth opportunities:** Participants were faced with challenges around not receiving support for career growth, as well as not being able to find suitable vacant positions in line with career aspirations when considering leaving the department.

**Leave:** Participants highlighted challenges around not having the opportunity to take leave. In areas where employees work on a pay-for-performance salary structure, performance (and consequently remuneration) gets negatively affected when employees are not at work, making it difficult for employees to take leave.

**Management style:** Perceptions that misconduct was allowed by a team manager together with the experience of not being able to give feedback and engage with manager constituted a lack of job resources. Participants experienced that although managers invited them to share their opinions on matters in the workplace, there was not really a willingness to consider the input provided. The feeling also existed that feedback given to managers was often received in a negative light.

**Recognition:** Participants experienced feelings of not being appreciated and recognised in the job.

**Role clarity:** No clarity with regard to roles and responsibilities was experienced as a lacking job resource.

**Supervisor support:** The lack of supervisor support was highlighted in comments around team managers not providing assistance when employees continue to struggle with difficult conversations and not having good relationships with team managers. The difficult conversations referred to by participants related to challenges experienced in expressing a need for support from colleagues, as well as addressing unhappiness with certain processes not adhered to by colleagues in the workplace.

## Category 2: Personal resources

In category 2, personal resources are reflected through two main themes, namely used resources and lack of resources. Various sub-themes have been identified in each of the aforementioned themes. *Used personal resources* comprise the following sub-themes: affective coping, behavioural coping and cognitive coping.

**Affective coping:** Affective coping was expressed by participants as a personal resource in statements around 'loving the company' and 'love being here'. The function of emotion-focused coping is described in the literature as follows: it reduces the stressful emotional reaction by the environment (Folkman & Lazarus, 1980) and tends to be utilised by individuals to avoid failure and protect self-worth (Parker, Martin, Colmar & Liem, 2012).

**Behavioural coping:** Behavioural coping reflects as a frequently used personal resource that was highlighted by the majority of participants in this study. Included in behavioural coping are various strategies employed by participants to actively work towards solving problems contributing to distress experienced by participants; this include strategies aimed at acting on the environment as well as on the self (Shin et al., 2014). Keywords used to describe this sub-theme included putting healthy habits in place like going to the gym and spending time on hobbies, asking family and friends for help, moving to a smaller apartment to address financial problems, trying to live a healthy lifestyle and balance work and life, considering moving out of corporate environment and praying a lot to get clarity on what to do. Seeking professional support from psychologists and getting guidance from medical doctor or doctors on the

use of medication also formed part of behavioural coping that contributed to personal resources for participants.

**Cognitive coping:** Participants employed cognitive coping as a personal resource by using time off to reflect on own needs, learning to understand triggers that are causing emotional reactions and realising when it is necessary to distance oneself from the situation. Cognitive coping refers to strategies that people employ to respond to the experience of life stress (e.g. rumination, putting into perspective, positive refocusing, and acceptance and refocus on planning) (Garnefski, Kraaij & Spinhoven, 2001). In this study, cognitive coping was further exercised in concerted decisions that were made to not work overtime anymore and admitting to over-commitment.

The second theme within the category of personal resources was *lack of personal resources*, underpinned by sub-themes affective coping, behavioural coping, cognitive coping and support structures.

**Affective coping:** A lack of personal resources relating to affective coping was expressed through feelings of struggling to manage emotions, despondency, being on the verge of a breakdown, feeling depressed and beating oneself up when things go wrong.

**Behavioural coping:** Participants expressed a lack of personal resources relating to behavioural coping in admitting that they do not do much for themselves, showing signs of presenteeism, procrastination on tasks, deliberately keeping quiet because of what people might think and avoiding interaction with other people.

**Cognitive coping:** A lack of personal resources expressed through references relating to cognitive coping included comments of not looking forward to come to work, acknowledging that there are things that no one can help with, and questioning their own competence and value-add.

**Support structures:** Participants shared comments of family and support structures being based mainly in another city, in-laws working full time and offering little or no help, and not asking for help from friends.

## Discussion

This study was aimed at exploring resources from the perspective of employees identified as at-risk of burnout. Findings of this study examined two types of resources (job and personal) through a qualitative approach that contributed rich and insightful data.

### Job resources

Participants identified various job resources that influenced their well-being in this study. Within the category of job resources, *career opportunities* were identified as a received job resource together with *growth opportunities* being identified as

a lacking job resource. Participants highlighted the need to get exposure to new skills and the importance of having the opportunity to move into new positions. Our research confirms the finding of Biron and Eshed (2016) who highlighted the positive relationship between career paths and lower burnout levels and pointed out the great importance ascribed to career progression by generation Y employees.

*Coaching* was identified as a received job resource and participants emphasised the value gained from a personal development plan, as well as from discussing strategies with a coach, pairing up with a 'buddy', and shadow coaching. The value of coaching is confirmed by Duijts, Kant, van den Brandt and Swaen (2008) who found coaching to lead to significant improvements in health, life satisfaction, burnout and overall psychological well-being of employees. Organisations that are able to capitalise on the value of coaching are likely to achieve a competitive advantage through performance of employees in delivering upon business objectives.

Participants experienced *colleague support*, which included assistance from team members and good team relationships as a resource received in the workplace; however, it was also raised as a lacking resource by some participants in this study. In a study among teachers, Van Droogenbroeck, Spruyt and Vanroelen (2014) found relationships with colleagues to be directly related to emotional exhaustion and cynical depersonalisation, indicating that the support that teachers receive from colleagues can function as a buffer against burnout. The value of solid colleague relationships is clearly reflected in the aforementioned study, and encouraging colleague support as an integral part of organisational culture is likely to be to the benefit of the organisation.

*Communication* was described as a received job resource in cases where participants obtained clarity on work-related matters, but was also raised as a lacking resource by participants where no feedback was received, and changes and business decisions were not communicated properly. Kim and Lee (2009) found both supportive relationship communication and job-relevant communication to contribute to lower levels of burnout and a decline in turnover intention. In line with the social information processing theory, Brown and Roloff (2015) also confirm that burnout appears to be a job attitude that can be influenced by the communication from the organisation. The influence of communication as a job resource is clearly highlighted in the above statements and emphasises the need for organisations to create an environment that allows for optimal and regular communication with employees.

The opportunity to take *leave* was viewed by some participants as a job resource, whereas others found it difficult to take leave or even experience a negative impact upon performance. Fritz and Sonnentag (2006) found recovery from work demands to occur during vacation and allowed for individual

resources to be replenished. Positive experiences during vacation also further contributed to rebuilding resources, as reflected in well-being and performance-related outcomes upon employees' return to work. Based on the above, it can be concluded that creating an environment where employees are able to take sufficient leave to allow for effort recovery should contribute to an enhanced well-being of employees.

Receiving professional support upon *referral* by the organisation was also viewed as a received job resource by participants. This included referrals for psychological as well as psychiatric support offered as part of the organisation's Employee Assistance Programme. This finding confirms the research by Tetrick and Winslow (2015) who emphasised the importance of employee wellness programmes and reported on the preventative stance of wellness programmes nowadays aimed at enhancing job and personal resource for employees.

Participants experienced *supervisor support* as a received job resource through good relationships with team managers and support received from managers and team managers in dealing with various matters. There were also cases where supervisor support was identified as a lacking resource. This study confirms the findings of Weigl et al. (2016) that found supervisor support to be an important resource for employees in dealing with high self-reported work stress.

Further, sub-themes that were identified by participants as lacking job resources included financial assistance (studies), management style, recognition and role clarity. *Financial assistance* was experienced by participants in the rejection received upon applying for study assistance. Starrin, Aslund and Nilsson (2009) highlighted the risk for psychological ill health as a result of greater financial stress.

*Management style* was experienced by participants in the perception which existed that it was unsafe for participants to openly share feedback with management. This finding is in support of research by Arnold, Turner, Barling, Kelloway and McKee (2007) who confirmed a positive relationship between transformational leadership and psychological well-being of employees. These findings emphasise the value and importance of embedding an effective leadership style as part of creating an environment that enables optimal well-being of employees.

*Recognition* as a lacking resource was experienced by participants through feelings of not being appreciated for the job they were doing. Brown and Roloff (2015) found that organisations can buffer the burnout process by rewarding their hardest working with monetary incentives or by demonstrating gratitude for their extra time and effort.

*Role clarity* was also identified as a lacking resource by this study and support findings by previous researchers which found role ambiguity and role conflict to be related to higher levels of burnout experienced by employees (Faúndez, Monte, Miranda, Wilke & Ferraz, 2014). The results of these studies emphasise that organisations should be clear on what

is expected of employees in their roles, to benefit from greater employee well-being.

## Personal resources

*Affective coping* was a personal resource identified by participants as part of used resources, that is, participants commented on feelings of affection towards the company (love the company); it was, however, also recognised as a lacking resource through feelings of despondence, being out of control and feeling depressed. Buruck et al. (2016) recognised the importance of dealing with negative emotions at work and found affective regulation training to contribute to increasing emotion regulation skills and well-being of employees. It can therefore be reasoned that by creating an environment wherein employees are empowered (e.g. training) to more effectively regulate their emotions (e.g. accept, tolerate and modify), organisations can contribute to enhance overall well-being of employees.

*Behavioural coping* was identified by participants as a used resource as well as a lacking resource. Extensive experiences were shared which constituted examples of instances where behavioural coping was employed by participants in the study, for example, putting healthy habits in place (exercising), spending time on hobbies, taking action to address financial problems and making changes to allow for a better work–life balance. Shin et al. (2014) found problem-focused coping to be associated with lower levels of burnout. 'Rational coping behaviours' has also been identified in literature as a resource that helped to overcome job-related stressors (Antoniou, Ploumpi & Ntalla, 2013). Participants in this study identified behavioural coping as a lacking resource with references to not taking action and avoiding interactions with other people. This is also in alignment with previous studies which found avoidance coping to be associated with higher levels of emotional exhaustion and depersonalisation components of burnout (Austin, Shah & Munce, 2005).

*Cognitive coping* also fall into both categories of personal resources. Our findings concur with a study by Rupert, Miller and Dorociak (2015) which found that applying cognitive strategies (maintaining a sense of control, reflection on satisfying work experiences, maintaining professional identity and maintaining self-awareness) to keep perspective on one's work contributed to reducing both emotional exhaustion and depersonalisation components of burnout. Capitalising on cognitive coping can become a valuable personal resource for employees in embracing well-being and countering risks of burnout.

*Support structures* was the final lacking personal resource identified by participants in the study and referred to a lack of support from family and friends. Social support (e.g. getting help with a task and being able to discuss their situations and feelings) has been confirmed as an effective coping resource that buffers the adverse effects of high job stressors and contributes to lower levels of burnout (Garrosa et al., 2010). Encouraging employees to build strong social support networks could therefore be argued to enhance personal resources and contribute to greater employee well-being in the workplace.

## Practical implications

Although the impact of resources on burnout has been studied in the literature, research within the South African context on the topic remains limited, specifically relating to the impact of personal resources on burnout. This study provides an enhanced understanding of job and personal resources on the well-being of at-risk employees. Creating awareness for employees around the availability of resources and encouraging at-risk individuals to engage with and utilise job and personal resources lead to greater well-being and higher levels of engagement in the workplace. The challenge for organisations will remain in operationalisation of the implementation of such strategies to equip individuals with the necessary training and skills to successfully apply such strategies.

## Limitations and recommendations

The findings of this study should be interpreted in the light of various limitations. Firstly, because of the sensitive nature of the topic being studied, there might have been instances where participants felt uncomfortable to share personal and sensitive information. Secondly, although not recording interviews verbatim could be seen as a limitation, the researcher believes that it was the right decision to ensure collection of accurate and truthful data. Thirdly, another potential limitation of the study could be that it focused only on the experience of resources from the perspective of employees and did not investigate the view on resources from the organisation's perspective. Acquiring a better understanding on the availability of resources offered and measures taken by the organisation to provide support to employees at-risk of burnout could have contributed to creating a more comprehensive understanding of resources from the perspectives of both employees as well as the organisation. A recommendation for future studies would be to follow an integrative approach to explore resources from the viewpoint of employees as well as the organisation.

## Conclusion

This study presented both job and personal resources (received and lacking) from the perspective of employees at-risk of burnout may be important to consider in the overall well-being of employees. Having a better understanding of the type of job and personal resources which could impact upon well-being can empower individuals, as well as organisations, to ensure the availability of sufficient and relevant resources. This study can assist with the establishment of an organisational culture where employees are encouraged to make use of resources.

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## Competing interests

## Authors' contributions

This manuscript forms part of C.G.'s PhD dissertation and as such took the lead in the writing of the manuscript. L.T.d.B. was the promoter of the study, acted as co-coder and provided conceptual input. L.B. acted as a co-coder and provided important guidance in the structure and writing of the manuscript.

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# Motivation sources and leadership styles among middle managers at a South African university

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**Orientation:** Leadership challenges have been evident in the South African higher education sector since 2004. Dealing with these challenges has focused more on external factors at top management level than on the possible contribution of intrinsic factors among other levels of institutional management.

**Research purpose:** The purpose of the research was to determine the relationship between motivation sources and the leadership styles of middle managers in a South African higher education institution.

**Motivation for the study:** The ongoing leadership challenges in the higher education sector in South Africa require not only strategies to deal with them at a national level but also academic efforts that focus on previously neglected areas, such as sources of leadership motivation.

**Research design, approach and method:** The population of the study consisted of 75 middle managers, comprising both academic and non-academic staff. A final sample size of 40, conveniently selected, was achieved. A quantitative research approach was employed using the case study method.

**Main findings:** Results showed a positive relationship between transformational leadership and intrinsic process motivation, self-concept internal motivation and goal internalisation motivation. A negative correlation was found between instrumental motivation and transactional leadership style.

**Practical and managerial implications:** Motivation sources could be used to explain leadership behaviour and assist in the selection and development of specific leadership styles for the different managerial levels within academic institutions through motivation profiling. Sources of motivation may provide one of many pieces of information to consider when making recruitment and leadership development decisions within institution.

**Contribution or value added:** This is the first study of its kind to investigate the two variables within a higher education context. The study makes an invaluable contribution to the broadening of existing knowledge and a scholarly understanding of leadership motivation and behaviour.

## Introduction

This study seeks to determine the relationship between motivation sources and leadership styles among middle managers at a South African university. Leadership styles are conceptualised as different approaches adopted by leaders at different levels in an organisation to guide and direct the behaviour of subordinates towards the achievement of organisational goals (Quick & Nelson, 2009). Motivation sources are defined as those psychological states that arouse an individual to act in a particular and sustained way (Kreitner & Kinicki, 2010).

Research has shown that leaders can be understood, and subsequently developed, by examining a number of variables that contribute to their leadership styles. For example, evidence alludes to the existence of a relationship between a leader's life events and leadership style (Barbuto, 2005); between the personality of a leader and leadership practice (Dulewickz & Higgs, 2005); between personal variables, such as age, and leadership style (Bass & Riggorio, 2008); and between motivation and leadership style (Barbuto, 2000). In most of these studies, the leadership style frequently reported was that of transformational leadership, with other leadership styles not significantly explaining the variance in data.

Empirical evidence is also available (Ryan, 2010) on the existence of different sources of motivation such as goal internalisation, self-concept internal motivation, intrinsic process motivation, instrumental motivation and self-concept external motivation. The extent to which these motivational sources could explain different leadership behaviours among top management in a corporate environment has been established (Barbuto, 2000). An understanding of this relationship is important in all sectors and at all levels of management. Research by Fernandez and Rainy (2006) and Northouse (2016) shows that middle management in any organisation is critical for ensuring the implementation of strategies and policies and therefore contributes to organisational effectiveness and profitability. Although researchers have investigated motivation and leadership in different organisations, research in academic institutions, more particularly in emerging economies, has remained a neglected area (Siddique, Aslam, Khan, & Fatima, 2011).

## Context of the study

Since the mergers and incorporations of higher education institutions in South Africa 14 years ago, the higher education sector has experienced debates and concerns on issues of leadership, curriculum development and many other critical issues (Kristan, 2005). These concerns have continued unabated, as evidenced by the recent wave of student protests in the higher education sector. Most of these protests were, and continue to be, directed at universities' leadership. What this suggests is that leadership issues in the South African higher education system remain a challenge and require attention.

Leo (2015) confirms that leadership concerns in the higher education sector in South Africa date back to 2004. The mergers, and resultant transformation agendas which were followed, were necessitated by the need to redress past inequalities, meet the pressing needs for access to higher education and respond to new realities and opportunities, such as changes in student demographics (Van der Westhuizen, 2004). The overall aim was to increase accessibility and achieve equity in the provision of higher education for all. The mergers and incorporations created new types of higher education institutions, such as Universities of Technology, *hereafter referred* to as UoTs, characterised by their vocational orientation (Chipunza & Malo, 2017). Students enrolled in these institutions spend a year in the workplace before they graduate. Most of the current higher education institutions in the country were established as a result of either an incorporation or a merger between two or three previously different institutions. This meant that there were changes in leadership, systems, procedures, staff quality and complement, student numbers and conditions of service, among other things, in order to live up to the new demands of a new order.

The above-mentioned changes meant that the new universities' management had to design new strategies, recruit new personnel, and redeploy and reassign others in order to implement new policies and programmes, as well as to achieve a new culture infusion within these institutions. In other words, the right 'middle managers' had to be recruited to ensure that the new order was lived and realised, and that the required attitudes, culture of work and issues of quality were gradually established. Despite this, there have been reports of mass resignations of middle and top managers from administrative and academic positions within these newly created higher education institutions. In addition, disturbingly poor quality and credibility of leadership at some of the higher education institutions has resulted in numerous court cases between some universities' leadership and the government over governance issues (Southern African Legal Information Institute, 2012). Further, governance of higher education at a systems level has been described as characterised by fragmentation, inefficiency and ineffectiveness, lack of cooperation, few common goals and negligible systemic planning (Higher Education South Africa, 2009; Shivambu, 2015). These concerns raise questions on the type of leadership that is appropriate for the country's higher education institutions.

Efforts have been made to address these concerns, such as setting up commissions of enquiry, appointing administrators and changing rectors (top leadership). However, there is a paucity of evidence indicating what has been done to understand the challenges faced by and associated with management within higher education institutions, more particularly those associated with middle managers, and the role played by motivation and leadership style in this regard. Considering the evidence that leadership can be understood from different sources, including motivation (Barbuto, 2000), the questions that arise then are, firstly, what type of middle managers or leaders were put in place in the new institutions to implement the new order? Secondly, what sources of motivation do these managers have that drive their leadership styles?

## Problem statement

The role of motivational sources in influencing leadership behaviour has been well researched among top managers in the corporate world (Barbuto, 2000). However, this relationship has not been explored widely at other levels of leadership within different sectors and in emerging economies, where leadership issues may be of great concern. An investigation of motivation sources and related leadership behaviour among middle managers within the higher education context in South Africa could assist in the selection and development of specific leadership styles for academic institutions through motivation profiling. The aim of this study was therefore to determine the relationship between motivation sources and leadership styles of middle managers at a South African university by answering the following questions:

- What are the sources of motivation for middle managers?
- What leadership styles are utilised by these middle managers?
- Is there a correlation between the middle managers' motivation sources and leadership styles?

# Literature review

## Theoretical framework

The study is based on Victor Vroom's expectancy theory (1964), which was popularised in his book *Work and Motivation* (Vroom, 1964). This is one of the most well-known key process theories and commonly applied in attempting to understand human motivation and the resultant outcomes. The theory holds that the tendency of a person to act in certain way depends on the strength of the expectation that the act will be followed by a given outcome and on the degree to which that person desires the outcome (Swanepoel, Erasmus, & Schenk, 2008). The theory is based on three variables: *valence* – the preference or values attached to the outcome by the employee, which varies from person to person; *instrumentality* – the extent to which one believes that performance at a given level will result in the desired outcome; and *expectancy* – the probability that a certain outcome will ensue if certain behaviour is chosen (Mullins, 2010). In this study's context, it is possible to argue that the decision to behave in a particular way as a leader, whether as a transformational, charismatic or transactional leader, is being based on the value held for such actions as well as the perception that certain outcomes (such as employees behaving in a certain way, e.g., increasing levels of productivity) could be achieved. Support for this argument is provided by Chen and Zhao (2013) who used expectancy theory to examine factors that motivate business faculty members to conduct research. The study found that the value of rewards was the biggest determinant of research productivity. According to Chen and Zhao (2013), faculty members who were not tenured tended to be motivated by extrinsic rewards, whereas tenured faculty members tended to be intrinsically motivated by the respect earned through conducting research. With such evidence, the justification for using the theory to understand the link between middle managers' sources of motivation and preferred leadership styles appears appropriate.

## The concept of leadership

Leadership is a widely researched topic, and its importance in modern organisations cannot be over emphasised. Leadership scholars have defined it in different ways. For example, Anca and Dumitru (2012) claim that leadership is the process of influencing the activities of a person towards achieving the objectives of the organisation, whereas McCallum and O'Connell (2009) regard leadership as the use of influence to encourage participation in achieving set organisational goals or objectives. A closer look at these definitions shows that leadership is the process of influencing others to work exceptionally well towards the achievement of the established organisational objectives or goals. This influencing process can be exerted by top, middle and supervisory level management in any organisational setting. In the context of this study, higher education middle managers, that is, non-academic staff holding responsible administrative and managerial positions below the level of registrar or chief administrative officer, as well as academic staff at the level of head of department, subject area or research unit and who may formally report to either a faculty dean or directly to the vice-chancellor, depending upon the decision-making structure of the institution (Schofield, 1996), are assumed to be critical in exerting influence within institutions of higher learning.

## Leadership styles

Leadership styles are a set of dynamic relationships, which are based on mutual influence between leaders and followers (Northouse, 2016). These dynamic relationships are expected to result in increased levels of motivation and development on either part. Mullins (2007) also maintains that leadership styles typically determine how the leader behaves towards members of the group. These relationships can be explained and understood within the framework of social exchange theory (Blau, 1964; Chernyak-Hai & Tziner, 2014) – an influential paradigm, which posits that human relationships are formed by the use of subjective cost-benefit analyses. This means that a leader whose style and interactions are based on trust and positive gestures will influence corresponding reciprocation by his or her subordinates. Although a number of leadership styles exist and have been reported in literature (Cummings & Worley, 2015), for the purpose of this study, three leadership styles have been adopted and tested in terms of how they are influenced by motivation sources. These are: the transformational leadership style, the transactional leadership style and the charismatic leadership style. These styles have received much attention in the literature and have been explored in similar studies in the private sector (Downes, 2016; Trevor & Hill, 2012).

### Charismatic leadership style

A charismatic leader is characterised by behaviour that is out of the ordinary, novel, unconventional and counter to norms (Schermerhorn, Osborn, Uhl-Bien & Hunt, 2012). Charismatic leaders are perceived as mavericks that initiate and support radical change. In organisations, charismatic leaders are useful in the sense that they can convince and inspire people to support changes (Bergh & Theron, 2006). In higher education institutions, charismatic leaders could arouse the motivation of followers, and this arousal could have important effects on attitudes such as commitment to the vision and the mission articulated by the institution. They can also be useful in the context of ongoing higher education sector changes in South Africa, in terms of inspiring and convincing subordinates to adopt to ongoing changes.

### Transformational leadership style

A transformational leader helps define the vision of the organisation and establishes the link between that vision and the type of management and organisational principles that are introduced (Badawy & Bassiouny, 2014). Transformational leaders are able to identify the long-term potential of an idea or organisation, and communicate the idea or dream to others in a convincing and inspiring manner (McCleskey, 2014). What this entails is that such type of leaders have the capacity

to transmit a sense of commitment and can craft activities and roles that are clearly and easily embraced by subordinates. It is how they do it that is important. For example, Oshagbemi and Gill (2003) suggest that transformational leaders treat each worker as an individual (individual consideration), transmit their values and ethical principles (idealised influence), provide challenging goals and communicate a vision of the future (inspirational motivation), and encourage innovative ways of problem-solving (intellectual stimulation). These four principles of transformational leadership have received much attention in many studies (Bass, 1985; Grant, 2012; Tse, Huang, & Lam, 2013).

Idealised influence is the manner in which subordinates trust and simulate their leaders' behaviours. The followers also embrace their leader's values and commit to achieve their vision, which maximises self-confidence and the pride of participating with the leader (Alabduljader, 2012). It is the emotional component of leadership and describes how leaders can act as role models. Inspirational motivation is achieved by providing meaning and challenge at work. Expectations are set by leaders for followers and are well communicated. Team spirit is aroused, and enthusiasm and optimism are displayed (Marchington & Wilkinson, 2012). Schepers, Wetzels and Ruyter (2005) concur that inspirational motivation involves inspiring and empowering followers to enthusiastically accept and pursue challenging goals and a mission. Intellectual stimulation is about challenging subordinates to be innovative and challenge their own beliefs and values as well as those of the organisation or leader (Northouse, 2016). The leader here promotes subordinates' own problem-solving approaches. Individualised consideration entails leaders acting as coaches, listening to subordinates and creating an enabling environment, though, for example, use of delegation (Wells & Peachy, 2011).

The impact of globalisation, technology advancements and a competitive operating environment have forced higher learning institutions to adapt to strategic change in order to remain relevant and competitive (Nordin & Kasbon, 2013). Therefore, the need for middle managers in higher education institutions to be transformational has become more critical than ever before, as the implementation of established strategic objectives has become a core managerial function. Middle managers are therefore expected to ensure that subordinates have the right motivation, knowledge, skills and attitudes in carrying out the activities necessary for the achievement of objectives in each division or unit.

## Transactional leadership style

Hargis, Watt and Piotrowski (2011:64) define transactional leaders as 'leaders who identify the needs of their followers and engage in exchange relationships with them based on objectives to be met'. With this style of leadership, clear goals and objectives are set and rewards (financial or non-financial) for achieving goals clearly specified. The transactional leadership style is based on three exchange styles, which are contingent rewards, active management by exception and passive management by exception (Sahaya, 2012). *Contingent*

*rewards* are the exchanges between leaders and subordinates in which efforts by subordinates are exchanged for specific rewards, such as salary and benefits, bonuses or other incentives. A job description, usually drawn up by middle managers, becomes the basis for the leader to understand the subordinates, because it states the job to be executed and what benefits the employee will receive in performing that job (Basham, 2012). *Active management by exception* is characterised by the leader's continued observation of followers to ensure that agreed upon standards of performance are met (Hargis et al., 2011). With active management by exception, a leader arranges to monitor performance of their subordinates, and communicates and takes corrective measures where subordinates are found to be wanting (Colquitt, Lepine, & Wesson, 2009). In this case, middle managers are at the cornerstone of ensuring compliance by subordinates with set out procedures or standards, and the application of suitable corrective procedures for the subordinates such as warning, transforming or dismissing (Alabduljader, 2012). Like any other organisation in the country, higher education sector administration and management in South Africa is guided by legislative frameworks, such as the Higher Education Act 101 of 1997, the King IV and V Reports on Corporate Governance, the Labour Relations Act 66 of 1995, and so forth. In addition, each institution has its own policies and procedures that must be complied with. Middle managers are, by the very nature of their function, responsible for ensuring most of the compliance issues. As such, elements of transactional leadership, especially the active management by exception skills, are needed by this group of employees.

## Leadership in higher education institutions – Global view

The leadership of higher education institutions has been placed under increasing scrutiny since the 1980s with the expansion of student numbers, changes in funding for student placements, technology and continuing globalisation of the sector (Black, 2015). With such ongoing changes, higher education institutions are required to consider how to develop their leaders and what might be the appropriate leadership behaviour to enable adaptation to these new circumstances (Black, 2015). For example, in the United Kingdom, the rapid change and transformation that took place in recent years, driven by various players in the field such as local governments, global markets and internationalisation, as well as student and local community demands (Angawi, 2012:34), necessitated the establishment of programmes to motivate, influence and shape the attitudes of staff, academics and students. The idea was to transform all levels of leadership within higher education institutions from playing figurative roles with administrative responsibilities, to change agents playing progressive transformational roles (Angawi, 2012). In the African context, the major challenges of higher education institutions are more related to governance and management. According to Sifuna (2012), typical challenges range from maladministration, underfunding and infrastructure to the unavailability of resources and inability of institutions to adapt to the globalisation trends. As alluded to previously,

South Africa has seen unprecedented changes in the higher education landscape since 1994 as restructuring policies of the democratic government were increasingly applied (Tsheola & Nembambula, 2015). The restructuring of South Africa's higher education sector placed onto the agenda the type of institutional leadership required to drive transformation, especially for mergers and incorporations involving historically disadvantaged universities. As a result, universities experienced leadership instability, public contestations, a paucity of academic leadership, internationalisation and globalisation imperatives, mushrooming of virtual, private and corporate universities as well as growing corporatisation, rampant managerialism and state control (HESA, 2009). The country's higher education institutions are seen by some to be riddled with intractable governance and leadership dilemmas (Tsheola & Nembambula, 2015).

# Work motivation

The term 'motivation' describes the reason for action to be taken. In the work context, Grobler, Warnich, Carrell, Elbert and Hatfield (2011) define 'work motivation' as the force that energises employee behaviour, gives direction to behaviour and underlies the tendency to persist, even in the face of one or more obstacles. Werner, Bagraim, Cunningham, Potgieter and Viedge (2017) concur that motivation is the power within people that arouses, directs and sustains their behaviour. A closer look at both definitions alludes to the fact that work motivation is an internal state that encourages an individual to perform outstandingly to achieve organisational goals. Several authors have pointed out the importance of motivation within the work environment. For example, Adzei and Atinga (2012) state that motivation makes employees put up positive attitudes, work hard, be punctual and contribute meaningfully to the organisation. Similarly, Toe, Murhadi and Lin (2013) observed that business success is linked to having teams of employees who are highly motivated. Studies highlighting why motivation is important in the workplace can, however, be criticised for focusing more on the internal and external conceptualisation of motivation and not much on their sources.

## Sources of work motivation

The notion of work motivation is grounded in two basic approaches to motivation: the content theories (Maslow Hierarchy Needs Theory, McClelland's Needs Theory, Herzberg's ERG Theory, Herzeberg's Two-Factor Theory (Schermerhorn et al., 2012), which focus on the individual factors(needs) within each person that initiate, guide, sustain and stop behaviour (Amos, Ristow, & Ristow, 2004), and the process theories (Equity Theory, Goal-Setting Theory, Vroom's Expectancy Theory (Martin & Fellenz, 2010), which explain the process of how behaviour is initiated, directed and sustained. Arguments for the merits of each viewpoint of motivation have been long and exhaustive in the social sciences literature (Barbuto, Trout, & Brown, 2004). No viewpoint can be regarded as superior to another as both can be used to contextualise motivation in

different situations (Bergh & Theron, 2005). However, using the tenets of these motivation theories in the last 20 years, five sources of work motivation have been developed and tested to predict transformational leadership behaviours, specifically (Barbuto & Scholl, 1998). The extent to which other leadership behaviours are linked to these developed five sources is still a grey area to be explored, especially in different organisational settings and contexts. The five sources are *intrinsic process motivation, instrumental motivation, self-concept external motivation, self-concept internal motivation* and *goal internalisation motivation.* These are briefly explained subsequently:

*Intrinsic process motivation* is derived from absolute enjoyment of working and work acts as an incentive because an employee enjoys what he or she is doing (Moradi, 2015). Barbuto and Gifford (2012) concur that this type of motivation refers to motivation because of the enjoyment of the task, wherein work itself becomes motivational for the individual because of sheer enjoyment of performing the task. Therefore, intrinsically motivated leaders find pleasure in the work they do. It is about enjoyment during the activity.

*Instrumental motivation* evolved from Barnard's (1938) exchange theory, as well as from expectancy theory and equity theory, which presume that organisations and employees enter into exchange relationships where external factors such as money or promotion drive employee motivation to perform a task (Northouse, 2016). Instrumental rewards therefore motivate individuals when they perceive that their behaviour will lead to certain extrinsic tangible outcomes, such as pay, promotions and bonuses (Barbuto 2005).

The *self-concept externally* motivated leaders seek affirmation from followers based on their traits, competencies and how they are perceived. The self-concept externally motivated leaders have a high need for recognition (Roberts, Hann, & Slaughter, 2006). This motivation is similar to McClelland's (1961) need for affiliation, Alderfer's (1969) relatedness needs and Maslow's (1943) need for love, affection and belonging (Barbuto & Gifford, 2012).

*Self-concept internally* motivated people set their own internal standards of traits, competencies and values. These become the basis for their motivation as they engage in behaviours to reinforce the set standards. They have a high need for achievement (McClelland, 1961).

Individuals motivated by *goal internalisation* believe in the cause or purpose of the organisation. It represents the absence of self-interest. They adopt behaviours that are in tandem with their ideal values and beliefs, and adopt a sense of duty and working towards the goal of the whole organisation (Barbuto & Scholl, 1998). Leaders high in goal internalisation emphasise on principles and values and look to matching them with goals and the organisational mission and vision (Moradi, 2015).

## Motivation sources and leadership styles

The purpose of this study is to determine if there is a relationship between middle managers' leadership styles and their motivation sources. As previously alluded, although previous studies have examined the relationships between the two (e.g., Antonakis & House, 2014; Barbuto, 2000; Buble, Juras, & Matic, 2014; Graves, Sarkis, & Zhu, 2013), the different context (higher education) managerial level considered (middle managers), as well as the addition of other leadership styles (transactional and charismatic), is what makes this study unique.

Previous studies have shown that intrinsically motivated leaders find enjoyment and pleasure in the work they do (Barbuto, 2005). Transformational leaders, on the contrary, achieve maximum performance from followers because they are able to inspire followers to raise their criteria for success and to develop innovative problem-solving skills (Northouse, 2016). It is therefore suggested that a leader who inspires is one who enjoys his or her work. This enjoyment of his or her work could be a source of inspiration (role models) to the followers to emulate the leaders' behaviour and also incorporate enjoyment with their work. It is further postulated that leaders motivated by work itself are more likely to allow divergent views in the work context, create a work climate of delegation and treat each employee in a unique way. As such, these leaders are likely to self-report an ideology consistent with transformational leadership. A study by Barbuto (2005) conducted among 186 leaders from various organisations in the United States reported that intrinsic process motivation correlated with transformational behaviours, although it was not in a higher education setting.

Charismatic leadership is thought to be key in the implementation of transformation, because it is the leader's ability to generate great symbolic power (Stout-Rostron, 2014). The charisma, which can be equated to the leaders' ability to articulate a vision as in transformational leadership, exhibiting sensitivity to follower and demonstrating novel behaviours, is what makes followers perceive the leader as endowed with exceptional skills or talents. Research has demonstrated strong relationships between charismatic leadership and follower trust, commitment and effort (Lowe, Kroeck, & Sivasubramaniam, 1996). Both charismatic and transformational leaders have the potential of inspiring their followers to emulate their leaders' behaviour and incorporate enjoyment in their work (Avolio, Waldman & Einstein, 1988). As such, in this study, it is thus hypothesised that *intrinsically process motivated middle managers would be more inclined to using transactional and transformational leadership styles.*

Instrumentally motivated leaders see the value in a reward system for employees (Moradi, 2015). This resonates with the tenets of transactional leadership which argues that transactional leaders work within a system of reward or punishment for employees (Hargis et al., 2011). Findings from a study carried out by Barbuto, Fritz and Marx (2000) in

the United States among 56 leaders and 234 followers from a variety of organisations revealed that instrumental motivation correlated with transactional leadership style, contingent rewards and management by exception. The study used top leadership and their immediate followers in a developed context, and not in the higher education sector. Although in the higher education sector middle managers might not necessarily control rewards such as money for employees, they have discretionary powers to determine other non-monetary rewards, such as delegation, praising and recognition. Use of such rewards can be linked to the aspects of transactional leadership behaviours such as giving orders and telling or communicating the organisation's purpose. It is therefore *expected that middle managers' standing on instrumental motivation will be correlated with their transactional leadership style.*

When leaders are high in external self-concept motivation, they tend to be externally based and seek affirmation of their traits, competencies and values from external perceptions (Barbuto, 2005). Classic articulations of social rewards or social exchanges found in transactional leadership style are consistent with the motivational explanation of self-concept external motives (Barbuto, 2000). Both self-concept external motivation and transactional leadership style include managers using social rewards and praises to motivate employees to accept them and view them positively. Thus, leaders high in external self-concept motivation behave in ways that will make reference group members satisfied to gain their acceptance and status. Consistent with this type of motivational drive is the social identify theory of Ashforth and Mael (1989) which focuses on social reference and standing. This is supported by a study by Chaudhry and Javed (2012) who found a positive relationship between self-concept external motivation, and transactional and charismatic leadership styles among 278 employees in the banking sector of Pakistan. Similarly, the relationship of external concept motivation with charismatic leadership is supported by Kuhnert and Lewis (1987) who reported links between social tactics of influence, such as ingratiating and personal appeals, described as similar to charismatic leadership. Based on the above evidence, it is therefore suggested that *middle managers' self-concept external motivation will be related to charismatic and transactional leadership styles.*

Self-concept internal motivation is derived from an individual's desire to satisfy, sustain their perception of characters, sufficiency and values (Moradi, 2015). In this regard, motivation is regarded as freely chosen and emanating from one's self, and not under pressure from some external force (Brophy, 1989). Leaders whose source of motivation is self-concept accept their strengths and ability for self-determination. According to Pintrich and Schunk (2002), to have the desire to satisfy own sufficiency (strength) values is synonymous to self-determination. The author further argues that to have self-determination is to decide how to act in the environment one finds himself or herself in. This research suggests that transformational leaders' desire to create positive change is based on the self-

concept internally driven motivation which is linked to their desire to satisfy their strength in inspiring and intellectually stimulating others for organisational success. In addition, it is assumed that the desire to satisfy and sustain perceptions of their own values engenders leadership behaviours that create positive change in the followers – such as taking care of each subordinate's interests. It is reasonable therefore to suggest that when managers adopt the transformational leadership style, they are engaging in behaviours that satisfy their self-concept intrinsic motivation. Some studies, however, found results contrary to what is proposed in this study. For example, a study conducted by Barbuto (2005) among 186 leaders from a variety of organisations in the United States reported a negative correlation between self-concept internal motivation and transformational leadership behaviour. Despite this finding, the fact that the present study is utilising a different set of leaders in a particular context might prove otherwise. As such, it is hypothesised that *self-concept intrinsic motivation of middle managers will be related to transformational leadership styles*

Leaders high in goal internalisation emphasise on their principles and values and look to matching them with organisational mission, vision and goals (Moradi, 2015). Similarly, transformational leaders' behaviours are most typically seen in people who trust and believe in the goals of the organisation, naturally expanding to belief in the organisation's cause, mission and vision (Barbuto, 2005). Barbuto found a positive correlation between goal internalisation and transformational leadership behaviour indicating that managers with high levels of goal internalisation motivation self-report an ideology consistent with transformational leadership style. Their working behaviour has a purpose and a goal that is fulfilling the organisation's business direction and success. Middle managers represent an important group in organisations, performing a critical function between strategy formulation and implementation, and front-line management to achieve the strategy (McGurk, 2015). As such, their purpose is to satisfy the strategic interest of senior managers by inspiring, simulating and creating a climate for organisational success. Based on this analysis, it is hypothesised that *goal internalisation motivation of middle managers is correlated with transformational leadership styles*.

# Research design

The research sought to describe the proposed relationships between the variables of interests, that is, motivation sources and leadership styles. As such, an ex post facto design type, the correlational-descriptive case study design was adopted. The choice of the design was informed by the fact that the relationship to be described was only examined after the data had been collected, hence *ex post facto*.

## Quantitative research approach

The study followed the quantitative approach, associated with the empirical deductive reasoning philosophical paradigm, positivism. Quantitative research designs (Kumar, 2011) deal with large numbers or respondents, and also use numbers to generalise comparisons and conclusions about populations (Ghauri & Gronhaug, 2005). It was for these reasons, and the fact that hypotheses were generated for testing, that the approach was chosen. Interviews, which are time-consuming, could not have provided a platform for comparison of data.

## Research strategy

A case study strategy, using questionnaires as a data collection method, was used to determine the relationship between the middle managers' sources of motivation and their leadership styles.

## Research method

### Research setting

The study was conducted at the two campuses of one of the institutions of higher learning in South Africa.

### Target population

The target population in this study comprised all middle managers (academic and non-academic) at the university where the study was undertaken. The total population of both academic and non-academic middle managers was 75 ($N = 75$) and was divided as follows: 25 academic heads of department and 50 non-academic staff and heads of centres. The unit of analysis was each middle manager.

### Sampling

Sampling refers to the process used to select a part of the population for a study (Creswell, Vicki, & Clark, 2007). Sample size in quantitative research for a small population is about 30% of the population (Wagner, Kin & Lynch, 2012). Researchers always advocate for sample representatively, and not necessarily its size. In this research, 40 middle managers selected via non-probability convenience sampling participated in the study. This represented 53% of the population of middle managers at the university.

### Measuring instrument

Data collection was performed using a self-administered structured questionnaire. The self-administered questionnaire had items measured on a Likert type scale ranging from 1 = 'strongly disagree' to 5 = 'strongly agree'. The questionnaire consisted of three sections. Section A solicited biographic or demographic information in relation to respondents' age, gender and educational qualifications. Section B measured the middle managers' motivation sources, using the adapted and adjusted Motivation Sources Inventory (MSI) developed by Barbuto and Scholl (1998). Section C measured leadership behaviours among the middle managers' using the Multifactor Leadership Questionnaire (MLQ-Rater version) developed by Bass (1985). The items in these adopted questionnaire(s) were adjusted to suit the sample as well as the context of the study. Questionnaires were distributed by the researchers themselves to willing and available 'middle managers' at the institution.

## Statistical analysis

Descriptive statistics, such as frequency calculations, measures of central tendency (the mean, median and mode) and measures of variation (range and standard deviation) were used to summarise the sample responses to all questions or items in the questionnaire. Inferential statistics such as Cronbach's alpha, Spearman's and Pearson's coefficient correlations were used to determine the reliability of the different questionnaire items and test the hypothesised relationships among the different motivation sources and leadership styles. Detailed analyses procedures are described in the results section.

## Ethical considerations

Permission was sought and granted by the institution's research committee. The purpose of the research was explained to all participants to secure informed consent. Confidentiality of data collected by aggregating results, as well its safe keeping and provision of results to the university's authorities, was explained and assured.

# Results

## Response rate

Of the 75 middle managers, only 40 middle managers were willing to complete and returned the questionnaires, thereby representing a 53% response rate. According to Bryman and Bell (2011), a response rate above 50% is acceptable for any further analysis of data.

## Research participants

Thirty-six of the middle managers in the sample were males, whereas 24 were females. Forty-five of them were above 40 years of age, while 35.0% had at least a doctoral qualification, followed by 32.5% with at least a degree. More than 65.0% of the sample had worked at the institution for more than 5 years.

## Reliability coefficients

Cronbach's alpha coefficient was used to estimate the reliability of the motivation sources and leadership styles items. All the items of the two constructs had an alpha value of above 0.5, except for the individualised consideration variable of transformational leadership which was subsequently dropped from further analysis.

## Variables' averages

Averages were calculated to indicate the levels of importance attached to each of the variables by the respondents, as shown in Table 1.

As shown in the results above, inspirational motivation (4.45) had the highest mean average score, indicating greater consistency of responses for transformational leadership, followed by intellectual motivation, with a mean average

**TABLE 1:** Variables' averages.

| Variables | Mean | SD |
|---|---|---|
| Intrinsic process motivation | 3.70 | 1.08 |
| Instrumental motivation | 3.60 | 1.20 |
| Self-concept external motivation | 4.06 | 0.93 |
| Self-concept internal motivation | 4.30 | 1.23 |
| Goal internalisation motivation | 4.02 | 0.93 |
| Inspirational motivation | 4.45 | 0.77 |
| Idealised influence | 4.16 | 0.97 |
| Intellectual motivation | 4.38 | 0.66 |
| Motivation sources | 3.93 | 0.97 |
| Transformational leadership style | 4.29 | 0.99 |
| Contingent reward | 4.14 | 1.24 |
| Active management by exception | 2.80 | 1.22 |
| Passive management by exception | 2.05 | 1.21 |
| Transactional leadership style | 3.08 | 1.12 |
| Charismatic leadership style | 4.45 | 0.70 |

**TABLE 2:** Test for normality results.

| Variables | KS Statistic | $p$ |
|---|---|---|
| **Motivation sources** | | |
| Motivation sources | 0.168 | 0.006 |
| Intrinsic process motivation | 0.134 | 0.068* |
| Instrumental motivation | 0.101 | 0.200* |
| Self-concept external motivation | 0.139 | 0.049 |
| Self-concept internal motivation | 0.123 | 0.130* |
| Goal internalisation motivation | 0.113 | 0.200* |
| **Leadership styles** | | |
| Transformational leadership style | | |
| Idealised influence | 0.151 | 0.023 |
| Inspirational motivation | 0.258 | 0.000 |
| Intellectual motivation | 0.198 | 0.000 |
| Transformational leadership style | 0.097 | 0.200* |
| **Transactional leadership style** | | |
| Contingent reward | 0.159 | 0.012* |
| Active management by exception | 0.143 | 0.037 |
| Passive management by exception | 0.143 | 0.039 |
| Transactional leadership style | 0.124 | 0.124* |
| **Charismatic leadership style** | | |
| Charismatic leadership style | 0.129 | 0.090* |

*, Significance level 0.1.
KS, Kolmogorov–Smirnov test.

score of 4.38. Among the leadership styles, only charismatic leadership had the highest mean average score of 4.45. These results show that transformational leadership (especially inspirational motivation and intellectual stimulation) and charismatic leadership styles were regarded as most important by the respondents.

## Normality tests

Where parametric tests for correlations, for example, Pearson's correlation coefficient, are used to analyse data, the requirement is that all the variables must be normally distributed. In this regard, a normality test known as the Kolmogorov–Smirnov (KS) test was used to determine whether motivation sources and leadership styles were normally distributed. The results are presented in Table 2. Using a significance level of 0.1, normally distributed variables in the study were intrinsic process motivation, instrumental motivation, self-concept internal motivation,

goal internalisation motivation, transformational leadership style, contingent reward, transactional leadership style and charismatic leadership style. Those variables that are not normally distributed were self-concept external motivation, idealised influence, inspirational motivation, intellectual motivation, management by exception – passive, management by exception – active, and motivation sources. Therefore, two types of correlation coefficients were used, namely the Pearson's correlation coefficient and the Spearman's rho correlation coefficient.

## Hypotheses testing

To test the five hypotheses of the research, a correlation test was performed between motivation sources and leadership styles. Pearson's correlation coefficient was used on variables that were normally distributed, whereas the Spearman's rho correlation coefficient was used on variables that were not normally distributed.

The first hypothesis stated that *intrinsic process motivation is positively related to charismatic and transformational leadership style*. To test this hypothesis, the Pearson's correlation coefficient was used. In addition, the Spearman's rho correlation coefficients were used to establish whether or not there was a positive relationship between intrinsic process motivation and the components of transformational style (idealised influence, inspirational motivation and intellectual motivation), because Spearman's rho coefficients are normally used on variables that are not normally distributed. The results are presented in Table 3.

The results in Table 3 show that transformational leadership style and idealised influence had positive correlation coefficients of 0.323 and 0.321 and $p$ - values below 0.1, respectively. This means that there was a significant positive relationship between intrinsic process motivation and transformational leadership style and between intrinsic process motivation and idealised influence. Hypothesis 1 is therefore supported regarding these two variables. When managers adopt the transformational leadership style, they behave in admirable ways and display conviction and take a stand that causes followers to identify with them (Northouse, 2016). Previous research results on the relationships between the two variables are supported by the current results. For example, Barbuto (2005) reported that intrinsic process motivation correlated with transformational behaviours. This means that leaders who enjoy work also wish the same to happen to their followers and therefore make efforts to make

them understand the value of the vision and mission (idealised influence).

The second hypothesis state that *instrumental motivation is positively related to transactional leadership style.* Pearson's correlation coefficient was used to establish the existence or non-existence of a positive relationship between instrumental motivation and transactional leadership style and its component, contingent reward. Furthermore, the Spearman's rho correlation coefficient was used to establish whether or not there was a positive relationship between instrumental motivation and the following components of transactional style: active management by exception and passive management by exception. The results are presented in Table 4.

No relationship was found between instrumental motivation and transactional leadership. The results do not confirm hypothesis 2. This negative correlation contradicts the findings of Barbuto et al. (2000) who found that instrumental motivation correlated with transactional leadership style, contingent rewards and management by exception. Middle managers in university settings do not usually have control over employee rewards that are monetary in nature. The results could be a reflection of this explanation or the fact that most of the participants could have been heads of academic department whose rewards seem less than those of their non-academic counterparts.

In terms of the third hypothesis which states that *self-concept external motivation is positively related to transactional and charismatic leadership style,* the Spearman's rho correlation coefficient was used to test the hypothesis, specifically, the relationship between self-concept external motivation transactional leadership style and its components (contingent reward, active management by exception and passive management by exception), as well as between self-concept external motivation and charismatic leadership style. The results are shown in Table 5. No relationship was found between self-concept external motivation and charismatic leadership style. However, a positive correlation was found between self-concept external motivation and

**TABLE 3:** Intrinsic process motivation and charismatic and transformational leadership styles.

| Correlation | Variables | Value (CC) | $p$ |
|---|---|---|---|
| Pearson's | Transformational leadership style | 0.323 | 0.042 |
| | Charismatic leadership style | 0.119 | 0.463 |
| Spearman's | Idealised influence | 0.321 | 0.044 |
| | Inspirational motivation | -0.024 | 0.884 |
| | Intellectual motivation | -0.071 | 0.664 |

Other variable is instrumental motivation.
CC, correlation coefficient.

**TABLE 4:** Instrumental motivation and transactional leadership style.

| Correlation | Variables | Value (CC) | $p$ |
|---|---|---|---|
| Pearson's | Contingent reward | -0.137 | 0.399 |
| | Transactional leadership style | 0.044 | 0.787 |
| Spearman's | Active management by exception | -0.002 | 0.990 |
| | Passive management by exception | 0.126 | 0.438 |

Other variable is instrumental motivation.
CC, correlation coefficient.

**TABLE 5:** Self-concept external motivation, transactional and charismatic leadership style.

| Variables | Value (CC) | $p$ |
|---|---|---|
| Contingent reward | 0.152 | 0.350 |
| Active management by exception | 0.176 | 0.277 |
| Passive management by exception | 0.128 | 0.430 |
| Transactional leadership style | 0.267 | 0.096 |
| Charismatic leadership style | 0.109 | 0.504 |

Other variable is self-concept external motivation.
CC, correlation coefficient

transactional leadership style at a significance level $p = 0.096$ which was less than 0.1, accompanied by a coefficient of 0.267.

In terms of the hypothesised relationship between these two, hypothesis 3 is supported. With transactional leadership style, the manager sets clear goals and objectives and clearly specifies what rewards (financial or non-financial) can be expected for achieving goals (Sahaya, 2012). Based on these findings, one might infer that when middle managers adopt the transactional leadership style within the institution, they may be influenced by the institutional-wide performance management system of which they are in charge. As such, the results of this study are unsurprising as both self-concept external motivation and transactional leadership style involve leaders using social rewards and seeking praises to motivate and reward exceptional performance in employees. These results are also consistent with a study by Chaudhry and Javed (2012) who found a positive relationship between self-concept external motivation and transactional leadership style.

Hypotheses four stated that *self-concept internal motivation is positively related to transformational leadership style.* The Pearson's correlation coefficient was used to establish this relationship. In addition, the Spearman's rho correlation coefficients were used to establish whether or not there was a positive relationship between self-concept internal motivation and the components of transformational leadership style (idealised influence, inspirational motivation and intellectual motivation). The results are illustrated in Table 6.

The results in Table 6 show that the relationship between self-concept internal motivation and all components of transformational leadership style was highly correlated ($p = 0.000$) with positive coefficient values. Transformational leadership theory is all about leadership that creates positive change in the followers. To do so, leaders should themselves have an inner need to satisfy their personal values.

In this case, middle managers in the study showed how they were well grounded in directing followers towards the

**TABLE 6:** Self-concept internal motivation and transformational leadership style.

| Correlation | Variables | Value (CC) | *p* |
|---|---|---|---|
| Pearson | Transformational leadership style | 0.735 | 0.000 |
| | Idealised influence | 0.701 | 0.000 |
| Spearman's | Inspirational motivation | 0.326 | 0.040 |
| | Intellectual motivation | 0.539 | 0.000 |

Other variable is self-concept internal motivation.
CC, correlation coefficient.

**TABLE 7:** Goal internalisation and transformational leadership style.

| Correlation | Variables | Value (CC) | *p* |
|---|---|---|---|
| Pearson | Transformational leadership style | 0.348 | 0.028 |
| Spearman's | Idealised influence | 0.307 | 0.054 |
| | Inspirational motivation | 0.339 | 0.032 |
| | Intellectual motivation | 0.167 | 0.303 |

Other variable is goal internalisation motivation.
CC, correlation coefficient.

vision and mission of the institution (which they probably highly perceived and valued themselves), and now, they were trying to use transformational leadership tenets to satisfy these values. Odumeru and Ifeanyi (2013) argue that transformational leaders act in the interest of the whole group. Consistent with the present results, actions such as 'empowering' could be construed of as inspiring the group through the leader's intrinsic motivation drive. In a country like South Africa where transformation is high on the strategic agenda, transformational leadership styles are needed, more especially in institutions of higher learning which are facing constant pressure to change in a number of ways.

The last hypothesis states that *goal internalisation motivation will be positively related to transformational leadership behaviours.* The Pearson's correlation coefficient was used to establish whether or not there was a positive relationship between goal internalisation motivation and transformational leadership style. Additionally, Spearman's rho correlation coefficients were used to establish whether or not there was a positive relationship between goal internalisation motivation and the following components of transformational leadership style: idealised influence, inspirational motivation and intellectual motivation. The results are presented in Table 7.

The results in Table 7 show that transformational leadership style and two of its components (idealised influence and inspirational motivation) had *p*-values that were below 0.1 and also had positive correlation coefficients of 0.348, 0.307 and 0.339, respectively. This means that there was significant positive relationship between goal internalisation motivation and transformational leadership style, as well as with two of its components (idealised influence [$p = 0.054$] and inspirational motivation [$p = 0.032$]). Therefore, the above hypothesis is supported. These results correspond with Barbuto's (2005) findings in which transformational leadership style was found to be directly correlated with goal internalisation, indicating that managers with high levels of goal internalisation motivation are driven solely by a belief that the goals of the organisation are both worthwhile and achievable and therefore self-report an ideology consistent with transformational leadership style. The institution under study had a strategic vision and the fact that middle managers participated in its development could explain their standing on goals internalisation, and the need to ensure that subordinates are inspired and intellectually stimulated to embrace the strategic direction of the institution.

## Limitations and recommendations

The study is limited in terms of the generalisation of results, because a case study method was followed. In addition, a greater sample size could have led to a much broader view of the issues under investigation. Despite these limitations, the study provides a useful departure point for how middle management can contribute to the amelioration of leadership challenges in the South African higher education sector.

## Recommendations for practice

Like organisations in business and industry, institutions of higher education want to hire and retain talented and professionally committed academics. Motivation sources could be used to explain leadership behaviour and could therefore help in the selection and development of specific leadership styles for the different managerial levels within academic institutions through motivation profiling. Sources of motivation may provide one of many pieces of information to consider when making recruitment and leadership development decisions within institutions.

The findings regarding relationships between self-concept external and transactional leadership style provide a platform for institutions to design programmes that enhance social cohesion and further enhance a sense of affiliation among leaders. This has ramifications for leadership behaviours that support the implementation of new strategies and compliance with newly adopted policies. The results supporting relationships between intrinsic process motivation, self-concept internal motivation and goal internalisation and transformational leadership style call for development programmes that further promote the use of transformational leadership styles, bearing in mind the theory that confirms that leaders can be developed.

## Recommendations for future research

The focus on this study was on self-report measures. Future research could focus on other levels of management, but then compare this with data obtained from followers or subordinates. In addition, an extension of the study on a larger scale, using a bigger sample size, could highlight some best practices among different institutions in terms of profiling their leadership positions. Finally, the inclusion of how demographic variables could play a role on the choice of motivation sources and leadership styles among higher education leadership would be an interesting study for the future.

## Conclusion

Using quantitative analysis techniques, this study investigated the relationship between motivation sources (intrinsic motivation, instrumental motivation, self-concept external motivation self-concept internal motivation, and goal internalisation) and the three leadership styles (transformational, transactional and charismatic). The results showed that intrinsic process motivation highly correlated with transformational leadership style, especially idealised influence. Hypothesis 1 was therefore supported. It is therefore reasonable to conclude that the middle managers in the institution were motivated by the enjoyment they got from their work, and this had an influence on preferred leadership style, that being transformational leadership.

The hypothesised relationship between instrumental motivation and transactional leadership was rejected, leading to the conclusion that the middle managers' motivation was not driven by external rewards and that their leadership style was not based on promising reward to their subordinates.

No relationship was found to exist between self-concept external motivation and charismatic leadership style. However, self-concept external motivation was correlated with transactional leadership style. Hypothesis 3 was therefore not rejected pertaining to this relationship, suggesting that the middle managers were also driven by the need for affiliation, or recognition, and sought to achieve that through setting standards and ensuring that subordinates perform accordingly.

There was a significant relationship between self-concept internal motivation and transformational leadership, supporting hypothesis 4. One can therefore conclude that middle managers in the institution were driven by the need to achieve and that they valued and supported individual subordinates' inherent strength for the achievement of organisational goals through transformational leadership styles.

Goal internalisation motivation was found to be correlated with the transformational leadership style aspects of idealised influence and inspirational motivation, indicating that hypothesis 5 was not rejected. It can be concluded that the middle managers had a full understanding of the vision and mission of the institution and that they wanted such internalisation to be cascaded down to their subordinates through inspirational and motivational strategies.

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## Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

## Authors' contributions

C.C. conceptualised, analysed and wrote up the results and L.L.M. wrote up the literature and methodology sections.

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# The influence of organisational rewards on workplace trust and work engagement

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**Orientation:** In volatile and competitive business environments, organisations are faced with challenges to retain talented workers. Employees are increasingly leaving their jobs for a number of reasons, one of them being a perceived lack of adequate reward practices. Consequently, this has impacted on employee work engagement and confidence and trust in organisations.

**Research purpose:** The study sought to determine whether there is a relationship between rewards, trust and engagement, as well as whether rewards are able to predict trust and engagement in the South African workplace.

**Motivation for the study:** Organisations can no longer solely rely on extrinsic rewards to retain talent. Companies must draw on both extrinsic and intrinsic reward strategies to improve retention levels through endorsing higher levels of workplace trust and work engagement levels.

**Research design, approach and method:** A quantitative, exploratory and cross-sectional research design was utilised. Non-probability sampling using questionnaires consisting of scales from the *Job Satisfaction Survey*, *Intrinsic Motivation Inventory*, *Psychological Meaningfulness Scale*, *Basic Needs at Work Scale*, *Workplace Trust Survey* and *Utrecht Work Engagement Scale* were administered to a sample ($N = 251$) of South African employees in various industries within the Gauteng region.

**Main findings:** Results indicated that there is a moderate-to-strong positive relationship between the three constructs, and that rewards are able to predict trust and engagement.

**Practical and managerial implications:** The findings provide insight for behavioural practitioners to potentially draw upon when improving talent management strategies. Both extrinsic and intrinsic rewards are important factors in keeping employees engaged and ultimately retaining them.

**Contribution:** The study provided insight into the influence that organisational rewards may have on workplace trust, work engagement and retaining employees. Findings contribute towards improving talent management strategies.

## Introduction

The world of work has transformed drastically over the past two decades. With perpetual shifts in volatile environments, global firms are expecting their workforce to become equipped with more flexibility, new skill sets and the ability to adapt to the increasing pressures and demands that this emerging century presents (International Labour Office, 2006). What is more, organisations are competing with one another to attract and retain global talent (Kuptsch & Pang, 2006; Scott, McMulllen & Royal, 2012).

In the current economic climate, organisations are often forced to make changes to their reward and talent structures. This emanates as a result of organisations experiencing high turnover rates as skilled workers are increasingly leaving their current positions due to a perceived lack of adequate reward practices. This includes, for example, poor promotional opportunities, unsuitable pay structures, supervisory issues and challenges surrounding other benefits and incentives (Jiang, Xiao, Qi & Xiao, 2009; Nyaga, 2015; Robyn & Du Preez, 2013; Scott et al., 2012).

In an attempt to sustain organisational survival, downsizing and cost-saving practices through the use of reducing cost to company reward strategies have not only adversely impacted on employees' levels of work engagement (Scott et al., 2012) but have also reduced their confidence and trust in organisations as well (Fehr & List, 2004; Reinardy, 2010).

Exploring talent management concepts such as organisational rewards, workplace trust and work engagement has thus become crucial for the survival of organisations during competitive times (Balakrishnan, Masthan & Chandra, 2013; Enguene, 2015; Hytter, 2007; Kompaso & Sridevi, 2010; Kwenin, Muathe & Nzulwa, 2013; WorldatWork, 2006).

# Literature review

## Organisational rewards

Organisational rewards are deemed important aspects within the workplace (Aslam, Ghaffar, Talha & Mushtaq, 2015; Bussin & Van Rooy, 2014). Rewards have been defined as the financial, non-financial and psychological benefits that an organisation provides to workers in return for their contributions and efforts (Bratton & Gold, 2003; Haider, Aamir, Hamid & Hashim, 2015). Over the years, there has been a gradual shift in the nature of rewards towards encompassing more than just basic pay. As such, rewards may be intrinsic (internal to an individual), extrinsic (external to an individual), monetary (financial), non-monetary (non-financial) and direct (compensation for work conducted) or indirect (additional benefits) and may be used for a multitude of reasons and purposes. For example, rewards are often used to enhance motivation or performance (Aktar, Sachu & Ali, 2012; Hamukwaya & Yazdanifard, 2014), attract and retain human capital (Bussin & Toerien, 2015; WorldatWork, 2006), increase work engagement (Ram & Prabhaker, 2011) and heighten job satisfaction (Oriarewo, Agbim & Owutuamor, 2013; Ram & Prabhaker, 2011), amongst others.

## Extrinsic rewards

As a legal obligation and inherent to a job, extrinsic rewards are those salient incentives useful for attracting and retaining members of the workforce (Armstrong & Stephens, 2005; Nujjoo & Meyer, 2012). From a traditional perspective, Porter and Lawler (1968) defined rewards as the tangible benefits that employees receive for conducting their work. From a growing contemporary point of view, extrinsic rewards are increasingly being recognised and distinguished as either monetary or non-monetary in nature (Kimutai & Sakataka, 2015; Kshirsagar & Waghale, 2014).

Weatherly (2002) and Osa (2014) articulated that monetary rewards are those rewards which are tangible such as financial and money-driven incentives used to reward employee performance. Examples of these types of rewards include pay, promotion (which incorporates an increase in pay) and bonuses. Non-monetary rewards, on the other hand, are intangible and non-financial incentives such as fringe benefits and contingent rewards which comprise praise and personal recognition (Sajuyigbe, Olaoye & Adeyemi, 2013; Weatherly, 2002). According to Malhorta, Budhwar and Prowse (2007) and Mottaz (1985) as cited in Nujjoo and Meyer (2012), other types of extrinsic non-monetary rewards include social rewards which constitute the interpersonal relationships between the employee and his or her supervisors and co-workers.

Ample evidence exists which supports that extrinsic rewards have an influence on employee motivation (Aktar et al., 2012; Arnolds & Venter, 2007; Bowen, 2000; Hafiza, Shah, Jamsheed & Zaman, 2011). From an organisational perspective, work motivation is concerned with those aspects and forces that drive certain behaviours such as performing well (Omollo & Oloko, 2015; Takawira, Coetzee & Schreuder, 2014).

In past studies, it has been emphasised that extrinsic rewards are not motivators (Bowen, 2000; Oriarewo et al., 2013). Instead, they serve as those aspects which can either satisfy or dissatisfy a person. Wilson and Eckel (2003) argued that employees will only do the necessary to obtain an extrinsic reward (such as minimally doing what is required to obtain pay) which results in short-term compliance and which may ultimately lead to resentment. This is further confirmed by Wei and Yazdanifard (2014) who argued that monetary and financial rewards lead to satisfaction over the short term.

The need to explore extrinsic rewards in the workplace over the past decade has been highlighted by numerous authors. Van Aswegen et al. (2009) argued that leaders who place their sole focus on motivating employees by means of extrinsic rewards often come across difficulties in sustaining a motivated workforce. Armstrong and Stephens (2005) articulated that extrinsic rewards, and more specifically pay, may help an organisation attract and retain employees. In terms of short-term benefits, these authors both argued that tangible extrinsic rewards may help heighten levels of employee effort and reduce dissatisfaction.

## Intrinsic rewards

Intrinsic rewards are commonly defined as the rewards which are generally obtained from an employee's involvement in tasks and activities (Byars & Rue, 2011). Intrinsic rewards constitute rewards which are associated with personal and inner fulfilment that employees' experience when they achieve something (Van Aswegen et al., 2009). They are intangible and self-generated in that they are psychological, positive, meaningful and encompass an emotional, work-related experience which individuals obtain from their work (Stumpf, Tymon, Favorito & Smith, 2013; Thomas, 2009).

Intrinsic rewards are classified in different ways (Jacobs, Renard & Snelgar, 2014) and have been found to drive employee motivation which includes meaningful work (Stumpf et al., 2013), autonomy, recognition, appreciation and challenging tasks, amongst others (Hafiza et al., 2011; Ozütku, 2012).

According to Thomas (2009), the changing motivational dynamics in the workplace have increased the need for intrinsic rewards. He proposed that employees in contemporary organisations need to be more self-managed. In this context, self-management means that employees direct their own work activities which includes a sense

of meaningfulness, choice, competence and progress (Jacobs et al., 2014; Thomas, 2009). For the purpose of this study, the focus of intrinsic rewards is based on any experience which provides an employee with work that is meaningful and reaps interest and enjoyment. Furthermore, intrinsic rewards include an employees' perception of whether they have a sense of autonomy in their jobs (Ryan & Deci, 2000).

The first dimension to be included in this study is meaningfulness, which is derived from Thomas's (2009) model of intrinsic rewards. A sense of meaningfulness refers to the roles, tasks and duties that employees perform, which forms part of a higher purpose and portrays job worth (Jacobs et al., 2014; Thomas, 2009). The second dimension included in this study is job interest and enjoyment, as derived from the self-determination theory. This theory is concerned with human motivation and personality and holds that when people perceive themselves as competent and, experience a sense of belonging and autonomy, they engage in self-determination. This allows them to become intrinsically motivated towards pursuing their interests (Ryan & Deci, 2000). Harackiewicz and Hulleman (2010), therefore, defined interest as comprising of having consideration for something, regarding it as important, and having positive feelings towards it. On the other hand, enjoyment is defined by Tamborini, Bowman, Eden, Grizzard and Organ (2010) as the response of experiencing pleasure towards something.

The final dimension deemed significant in the exploration of intrinsic rewards is a sense of autonomy. Autonomy can be conceptualised as the amount of choice and psychological freedom that an employee has when carrying out his or her job (Van den Broeck, Vansteenkiste, De Witte, Soenens & Lens, 2010). Autonomy has further been defined as the degree to which employees are able to make decisions and feel trusted in carrying out their work efforts and performances (Zigarmi, Houson, Witt & Diehl, 2011).

Owing to the changing nature of the workplace, there is an increasing need to study and explore the role that intrinsic rewards play within the workplace (Thomas, 2009). It has been discovered that intrinsic rewards have a significant influence on job satisfaction (Rafiq, Javed, Khan & Ahmed, 2012), motivation (Ram & Prabhaker, 2011), work engagement (Jacobs et al., 2014) and work performance (Aktar et al., 2012).

## Total rewards

As opposed to rewarding employees solely through pay and monetary benefits, the concept of total rewards provides a holistic approach to viewing rewards that employees receive from engaging in the employment relationship (Nazir, Shah & Zaman, 2012). Total reward strategies encapsulate the sum total of those financial, non-financial, intrinsic and extrinsic rewards, which are made available to an organisation's human resources (Armstrong & Stephens, 2005; Tsede & Kutin, 2013). Moreover, total rewards encapsulate all aspects of a job that employees perceive as valuable (WorldatWork, 2006). For the purpose of this study,

total rewards are defined as the inclusion of all monetary and non-monetary returns (intrinsic and extrinsic rewards) that employees receive for investing their time, effort, energy, talents and results in their work (Armstrong & Stephens, 2005; Hotz, 2014; WorldatWork, 2006).

From a talent perspective, total rewards' strategies have been found to contribute towards attracting, motivating and retaining valuable talent in the workplace (Bussin & Toerien, 2015; Makhuzeni & Barkhuizen, 2015; WorldatWork, 2006). While some researchers argued that total rewards have been used to improve organisational competitiveness in the rapidly changing global markets (Jiang et al., 2009), other scholars have recognised that total rewards may be used as a strategy to enhance employee engagement (Hotz, 2014; WorldatWork, 2006).

## Workplace trust

Another important behavioural-related aspect that should not be overlooked in the retention of top talent is workplace trust (Chitsaz-Isfahani & Boustani, 2014; Enguene, 2015; Hytter, 2007).

A commonly accepted definition of trust in literature is hard to find (Bagraim & Hime, 2007; Bews & Martins, 2002; Hakanen & Soudunsaari, 2012). Trust is often defined in terms of one's vulnerability to the actions of others and that the belief in others' intentions and behaviours will lead to positive outcomes (Hakanen & Soudunsaari, 2012; Kreitner & Kinicki, 1995; Mayer, Davis & Schoorman, 1995; O'Brien, 2001).

Ferres, Connell and Travaglione (2004) stated that corporate forms of trust can be classified within three dimensions, namely, trust in the organisation, trust in management and trust in co-workers. Bagraim and Hime (2007) stipulated that trust in the organisation constitutes a systems form of trust. Organisational trust thus entails the confidence that an individual has in the company itself rather than in a particular person or group of people (Galford & Drapeau, 2002; Paliszkiewicz, 2011).

Trust in co-workers and in immediate management represents an interpersonal form of trust (Bagraim & Hime, 2007; Galford & Drapeau, 2002). Interpersonal trust is often regarded as the 'hallmark of effective relationships' (Dirks, 1999, p. 3) or the 'social glue' of affiliations within an organisation (Abrams, Cross, Lesser & Levin, 2003). It further refers to the perception that an individual has as to whether another person can be trusted under particular circumstances, either personally in their intentions, or in their attributes (Brown, Gray, McHardy & Taylor, 2015; McKnight & Chervany, 2001; Tan & Lim, 2009).

Ample literature has identified the need to study trust within an organisational setting. Six, Nooteboom and Hoogendoorn (2010) argued that trust is an important aspect during change events and, as such, provides one with the

ability to support change. The dynamics of trust and the potential value thereof can have a major influence on organisational functioning and behaviour. For instance, commitment and acknowledgement shown to organisational objectives and company values by employees, with a high degree of trust, tend to display more diligence and higher levels of productivity and innovation (Lyman, 2003; O'Brien, 2001; Sonnenberg, 1994).

Trust is, furthermore, seen to uphold cooperation within the workplace as it allows for the encouragement of information sharing, enhanced relationships amongst individuals and teams and enriches problem-solving and conflict resolution, which leads to better organisational performance (Brown et al., 2015; Lyman, 2003; Six et al., 2010).

## Work engagement

Organisational rewards and workplace trust have been found to lead to an increase in work engagement (Engelbrecht, Heine & Mahembe, 2014; Ram & Prabhakar, 2011; Sundaray, 2011; Thirapatsakun, Kuntonbutr & Mechinda, 2014). This study supports the commonly accepted definition by Schaufeli, Salanova, Gonzalez-Roma and Bakker (2002, p. 74) who define work engagement as 'the positive, fulfilling, work-related state of mind that is characterised by vigour, dedication and absorption'.

Vigour refers to elevated energy levels, the willingness to invest effort in one's work, one's mental resilience and one's persistence in the face of difficulties while dedication is a sense of enthusiasm, pride, inspiration and challenge (Altunel, Kocak & Cankir, 2015; Schaufeli et al., 2002). Schaufeli and Bakker (2003) expressed vigour and dedication as the most important dimensions of work engagement. Absorption, on the contrary, is characterised by one being satisfied with and immersed in work to the extent to which the individual encounters an optimal experience (Bell & Barkhuizen, 2011; Csikszentmihalyi, 1990).

Literature has shown that employees who are engaged in their work demonstrate higher levels of productivity, efficiency and a sense of personal accomplishment in their work, take initiative and persist with challenging and demanding tasks (Holbeche & Matthews, 2012; Rothmann & Jordaan, 2006). Furthermore, work engagement helps to boost employee motivation, morale, job satisfaction and psychological wellbeing. On the contrary, employees who are not engaged in their work tend to depict less commitment and are more likely to leave their organisation or quit their jobs (Hoole & Bonnema, 2015; Rich, Lepine & Crawford, 2010; Saks, 2006).

## The relationship between organisational rewards and workplace trust

Research about the relationship between organisational rewards and workplace trust is infrequent, fairly outdated and fragmented. Burke (2002) suggested that extrinsic rewards

may assist employees in developing trust. On the contrary, Tzafrir (2005) argued that managers are more likely and willing to increase compensation and incentive plans when they perceive their subordinates to be trustworthy.

The relationship between extrinsic rewards and workplace trust is not always optimistic. Fehr and List (2004) found that employees can perceive incentives as either hostile (negatively; as a threat or punishment) or as kind (positively; incentives given out of sincerity). When employees perceived their incentives in a more negative light, they were found to have a more harmful and unfavourable influence on certain behaviours such as reduced workplace trust. Similarly, Brown et al. (2015) argued that when organisations limit and reduce overtime pay, workplace trust may be weakened.

The relationship between intrinsic rewards and workplace trust has also been explored. In their study on self-determination in the workplace, Deci, Connell and Ryan (1989) reported that when managers were more supportive of autonomy amongst workgroups, employees reported higher levels of trust within organisations. Although not technically a reward, but useful to measure intrinsic rewards, Osmani, Zaidi and Nilashi (2014) argued that intrinsic motivation may lead to higher levels of trust within organisations. In addition, in Thomas's (2009) model of intrinsic rewards, trust is considered an important element which falls under the sense of choice dimension (which refers to one's ability to choose how work is accomplished, what work activities will be performed and a sense of ownership, independence and responsibility for work-related outcomes).

Ferrin and Dirks (2004) noted that organisational rewards may have a strong and predictable influence on interpersonal trust. They suggested that rewards can influence trust by means of altering employees' perceptions about the motives of others and evaluate their behaviours based on reward structures. Organisational leaders, subordinates and rewards play an imperative role in establishing a climate of workplace trust. When subordinates can be perceived as trustworthy and valuable by their superiors, organisational leaders are more inclined to nourish and enhance their loyalty through the use of rewards (Philips, 1997). In light of outdated findings, the influence of organisational rewards on trust is not only fragmented but limited. The investigation of this relationship is thus an area of research, which needs further exploration, particularly within the South African context.

## The relationship between organisational rewards and work engagement

A number of previous studies have found a positive relationship between organisational rewards and work engagement (Gill, Dugger & Norton, 2014; Hulkko-Nyman et al., 2014; Jacobs et al., 2014; Masvaure, Ruggunan & Maharaj, 2014; Sanhari, 2014; Yahya, Isa & Johari, 2012; Zhijian &Tianshu, 2013).

While research demonstrated that extrinsic rewards lead to higher levels of work engagement, the social exchange theory further supports this relationship. This theory holds that when employees receive rewards and recognition for their efforts exerted on a job, they will participate in a fair exchange through responding with increased work engagement (Gujral & Jain, 2013; Ram & Prabhakar, 2011; Waqas & Saleem, 2014).

In a South African study, Jacobs et al. (2014) found that when organisations provided employees with heightened intrinsic rewards, they were more engaged in their work. These results were consistent with those of Masvaure et al. (2014) who discovered that organisations whose employees were more intrinsically rewarded and driven demonstrated an increase in work engagement. In particular, intrinsic rewards and, more specifically, psychological meaningfulness were found to have a statistically strong relationship with employee engagement (May, Gilson & Harter, 2004).

Roberts and Davenport (2002) articulated that a work environment that reaps more types of rewards for employees can lead to an increase in work engagement. In addition, Ram and Prabhakar (2011) found that through the use of both intrinsic and extrinsic rewards, employees were more engaged in their work. Although much of the research has highlighted that the use of intrinsic rewards may lead to higher levels of work engagement, the use of extrinsic rewards should not be overlooked in the exploration of drawing on both types of rewards to ensure that employees are more engaged in their work (Obicci, 2015; Ram & Prabhakar, 2011; Roberts & Davenport, 2002; WorldatWork, 2006).

## The relationship between workplace trust and work engagement

Literature provides ample support indicating a positive relationship between workplace trust and employee engagement (Chughtai & Buckley, 2008; Engelbrecht et al., 2014; Men, 2015; Mone & London 2010; Ugwu, Onyishi & Rodriguez-Sanchez, 2014).

Costigan, Ilter and Berman (1998) noted that when employees perceive their supervisors to be competent and supportive, they are more likely to trust their superiors when workplace issues arise. Similarly, Ugwu et al. (2014) discovered that workplace trust has a significant and strong positive relationship with work engagement. Research carried out by Chughtai and Buckley (2008) as well as Mone and London (2010) proposed that having a good degree of workplace trust can result in increased work engagement. Men (2015) confirmed this in his study in the United States, finding that the quality of employee–organisational relationships (including trust) positively influences engagement.

To conclude, organisational rewards (Bussin & Toerien, 2015; Jacobs et al., 2014; Nujjoo & Meyer, 2012), workplace trust (Krot & Lewicka, 2012; Sousa-Lima, Michel & Caetano, 2013) and work engagement (Bedarkar & Pandita, 2014;

Beukes & Botha, 2013) are important behavioural-related concepts within today's world of work. With high turnover rates and the poor global economic climate, these concepts are significant for behavioural practitioners who invest time and energy into improving their talent management strategies for the purpose of seeking to retain skilled and valuable employees.

## Problem statement and research questions

Retaining a skilled workforce has become a major concern and challenge for many organisations, particularly within South Africa (Kerr-Phillips & Thomas, 2009; Muteswa & Ortlepp, 2011; Terera & Ngirande, 2014; Visser 2012). Organisations are moving away from traditional organisational reward practices in which salaries, bonuses and other concrete benefits are no longer being used as the only means for motivating and retaining their employees (Jacobs et al., 2014). These rewards alone are no longer effective in establishing workplace trust and ensuring that employees will be more engaged in their work (Jacobs et al., 2014; Martins & Von der Ohe, 2002; Scott et al., 2010).

It is, therefore, important that organisations aim to create favourable conditions for employees to reduce staff turnover and retain human capital. It is for this reason that South African organisations need to continually improve and better their talent management strategies by focusing on aspects such as organisational rewards to enhance workplace trust and work engagement. Against this background, the study sought to answer the following research questions:

- Question 1: Is there a relationship between organisational rewards, workplace trust and work engagement?
- Question 2: Do intrinsic rewards predict workplace trust and work engagement?
- Question 3: Do extrinsic rewards predict workplace trust and work engagement?
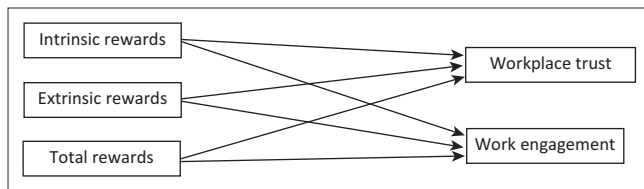- Question 4: Do total rewards predict workplace trust and work engagement?

## Objectives of the study

Research findings pertaining to organisational rewards, workplace trust and work engagement within the corporate South African context are limited. In addition, research is still largely growing as many gaps in the literature are prevalent. To contribute towards the body of knowledge through filling some of the recognised gaps, this research study primarily aimed to explore the relationship between organisational rewards, workplace trust and work engagement within the South African employment context. In addition, the research study sought to determine whether intrinsic and extrinsic organisational rewards predict workplace trust and work engagement.

## Conceptual model

In light of the aforementioned problem statement, literature review and overall aims of the research study, Figure 1

**FIGURE 1:** Conceptual model for the relationship between organisational rewards, workplace trust and work engagement.

demonstrates the conceptual model with regard to exploring whether there is a relationship between organisational rewards, workplace trust and work engagement and, additionally, to determine whether organisational rewards are able to predict workplace trust and work engagement.

# Research design

A quantitative, exploratory, cross-sectional research design was employed. Participants were selected based on their availability and willingness to participate. To be included in the study and increase the validity of the results, participants must have had at least one full year of working experience, had completed Grade 12 and been able to complete the questionnaire in English.

This study sought to comprehensively investigate the relationship between the key constructs amongst a multitude of employees who acquire rewards and returns for their efforts exerted in their jobs. As such, the intention of the study was to make the sample as representative as possible through obtaining a target group consisting of both men and women, participants of all ages, races and home languages as well as having a vast range of years of working experience and education level. The findings generated from the sample can, therefore, contribute towards research in a multitude of industries, sectors and disciplines.

To collect data from the participants, a non-probability convenience sampling procedure was utilised. This sampling technique entails selecting participants from a target population based on the researcher's convenience and access to participants (Ross, 2005). In addition, this technique is used to select participants who are readily available to the researcher at the time of data collection (Zikmund, 2003). Advantages of utilising this technique include that it is less expensive than other techniques, less time-consuming and easier to utilise when obtaining participants.

A total of 350 questionnaires were distributed to employees in various industries and sectors within the Gauteng region. All necessary steps in line with ethical considerations were taken to ensure anonymity and confidentiality. After a data vetting process took place, the final random sample consisted of 251 South African employees ($N = 251$).

The final sample consisted of 42.6% men and 57.4% women. Their ages ranged between 17 and 72 years, with the majority of the participants falling into the 26–36 age category. The distribution with regard to ethnicity was black

people ($n = 55$; 21.9%); mixed race ($n = 16$; 6.4%); Indian or Asian ($n = 16$; 6.4%); white people ($n = 163$; 64.9%) and other ($n = 1$; 0.4%). The three main language groups were English (42.6%), Afrikaans (32.7%) and isiZulu (13; 5.2%). Regarding education, the majority of participants had a Grade 12 level education (36.3%), followed by having a diploma or certificate (25.5%) and a bachelor's degree (12.4%). In terms of working experience, the distribution was more or less equal, representing 1–5 years' experience (24.3%), 5–10 years (26.7%), 10–20 years (23.9%) and 20+ years of working experience (25.1%). With regard to the industry that participants were currently employed in, the sample was well distributed.

## Measuring instruments

The questionnaire consisted of seven measures including a demographic and biographical information section compiled by the researchers. To our knowledge, there is no strong instrument measuring extrinsic and intrinsic rewards available. The researchers, therefore, resorted in using different subscales to measure the different components of rewards; as was introduced in the literature review. The measures utilised in the questionnaire are briefly introduced.

### Extrinsic rewards
*Job Satisfaction Survey* (*JSS*) was developed by Spector (1985). The JSS is designed to measure perceptions and attitudes regarding various aspects of an individuals' job. Four subscales comprising four items each were selected from this instrument, which included pay, promotion, fringe benefits and contingent rewards. Respondents were required to indicate their responses on a six-point Likert-type scale ranging from 1 (*disagree very much*) to 6 (*agree very much*). Examples of items include: 'I feel I am being paid a fair amount for the work I do' and 'I am satisfied with my chances for promotion'. Spector (1985) reported a Cronbach alpha reliability coefficient of 0.91 for the overall scale and coefficients of 0.75, 0.73, 0.73 and 0.76 for the subscale scores, respectively. Within the South African research context, Lumley, Coetzee, Tladinyane and Ferreira (2011) reported satisfactory Cronbach alpha coefficients of 0.78, 0.78, 0.72 and 0.76, respectively.

### Intrinsic rewards
*Intrinsic Motivation Inventory* (*IMI*) was developed by McAuley, Duncan and Tammen (1989). The IMI is designed to measure participants' subjective work-related experiences regarding intrinsic motivation. The interest or enjoyment subscale was selected from this instrument. This subscale comprised seven items, which were measured using a seven-point Likert-type scale. Respondents were required to indicate their responses ranging from 1 (*not true at all*) to 7 (*very true*). An example of an item includes: 'I enjoy doing this activity very much'. Previous studies yielded a Cronbach alpha reliability coefficient of 0.78 (McAuley et al., 1989) and 0.89 (Monteiro, Mata & Peixoto, 2015). Within the

South African context, Masvaure et al. (2014) reported an alpha coefficient of 0.75.

*Psychological Meaningfulness Scale* (*PMS*) was developed by Spretizer (1995). The PMS is designed to assess psychological meaningfulness in the workplace. It consists of six items, which are measured on a five-point Likert-type scale and assess the degree to which individuals assign meaning to their job-related tasks. Responses range from 1 (*totally agree*) to 5 (*totally disagree*). Examples of items include: 'The work I do on this job is worthwhile', 'My job activities are important to me' and 'I feel that the work I do on this job is valuable'. This scale has frequently been used within the South African context, where acceptable Cronbach alpha coefficients have been reported. For instance, Williamson (2011) and Van Zyl, Deacon and Rothmann (2009) reported a reliability coefficient of 0.85, whereas Rothmann and Hamukang'andu (2013) reported a reliability coefficient of 0.67.

*Basic Psychological Needs at Work Scale* (*BPNWS*) was developed by Deci and Ryan (2000). The BPNWS is designed to measure intrinsic need satisfaction in specific domains within one's life. To measure autonomy at work, the autonomy at work subscale was selected from this instrument. It consists of seven items that are measured on a seven-point Likert-type scale, with responses ranging from 1 (*not true at all*) to 7 (*very true*). Examples of items include: 'I feel pressurised at work' and 'When I am at work, I have to do what I am told'. In their study, Deci et al. (2001) reported a Cronbach alpha coefficient of 0.85 for the autonomy at work subscale. In a more recent study, Stäbler, De Boer and Rosema (2016) found an adequate reliability coefficient of 0.70. In addition, Coetzer (2014) found a Cronbach alpha coefficient of 0.82 within the South African pharmaceutical industry.

### Workplace trust

*Workplace Trust Survey* (*WTS*) was developed by Ferres (2001). The WTS is designed to measure trust within organisations. It consists of 36 items that measure three subscales: namely, trust in organisations, trust in co-workers and trust in supervisors. These subscales comprise 12 items each, which are measured using a seven-point Likert-type scale ranging from 1 (*strongly disagree*) to 7 (*strongly agree*). Examples of items include: 'I feel that information can be shared openly', 'I believe that my manager follows promises through with action' and 'I think that my co-workers act reliably from one moment to the next'. A high measure of internal consistency was found by James (2011) who reported an alpha coefficient at 0.97. Cronbach alpha reliability coefficients between 0.90 and 0.97 in both the South African and Australian context have further been reported (Ferres, 2001).

### Work engagement

*The Utrecht Work Engagement Scale* (*UWES* – 17 item) was developed by Schaufeli et al. (2002). The UWES is designed to measure work engagement. It comprises 17 items that measure vigour, dedication and absorption (the three subscales of work engagement). To rate the items, a seven-point Likert-type scale is used, with responses ranging from 0 (*never*) to 6 (*always*). Examples of items include: 'At my work, I am bursting with energy', 'I find the work that I do full of meaning and purpose' and 'I am immersed in my work'. Research has shown that the UWES has satisfactory reliability. Cronbach alpha reliability coefficients have been reported at between 0.68 and 0.91 (Schaufeli et al., 2002). In a South Africa study, De Bruin, Hill, Henn and Muller (2013) found reliability coefficients of 0.88, 0.91 and 0.85 for the subscales.

## Statistical analysis

The statistical analysis was carried out using SPSS version 22 (SPSS Inc., 2013). To analyse the data from the responses in the questionnaires, descriptive statistics (means, medians and standard deviations) and reliability tests utilising Cronbach alpha (Cronbach, 1951) for each scale were used to determine internal consistency, validity and homogeneity of the measuring instruments. Pearson's product–moment correlation and Cohen's effect size (Cohen, 1988) were selected to investigate the relationship between organisational rewards, workplace trust and work engagement. Standard multiple regression analysis was conducted to determine whether intrinsic rewards, extrinsic rewards and total rewards predicted workplace trust and work engagement.

# Results
## Descriptive statistics

To determine normal distribution and provide more information on the scales and instruments used, descriptive statistics were executed (see Table 1). The scales all fell well within the generally acceptable range of < 2 and < 4 (Finch & West, 1997) and were all normally distributed.

Table 1 depicts the alpha coefficients and normality scores for the scales utilised. Most of the scales were found to be satisfactory in accordance with the guideline of > 0.70 (Nunnally & Bernstein, 1994). The highest reliabilities amongst the scales included trust in organisation ($\alpha$ = 0.95), trust in supervisors ($\alpha$ = 0.95) and trust in co-workers ($\alpha$ = 0.96), followed by psychological meaningfulness ($\alpha$ = 0.93). The scales that produced the lowest reliabilities included contingent rewards ($\alpha$ = 0.59), fringe benefits ($\alpha$ = 0.61) and promotion ($\alpha$ = 0.62).

## Correlation analysis

To answer the primary research question, Pearson's product–moment correlations were calculated (see Table 2).

The results indicated that extrinsic rewards have a statistically and practically significant relationship with intrinsic rewards ($r$ = 0.42; $p$ < 0.01; medium effect), total rewards ($r$ = 0.90; $p$ < 0.01; large effect), workplace trust ($r$ = 0.68; $p$ < 0.01; large effect) and work engagement ($r$ = 0.34; $p$ < 0.01; medium effect). It was further found that intrinsic rewards have a statistically and practically significant

**TABLE 1:** Descriptive statistics of the organisational rewards, workplace trust and work engagement scales.

| Item | Mean | SD | Skewness | Kurtosis | α |
|---|---|---|---|---|---|
| Pay | 13.66 | 4.59 | 0.05 | -0.40 | 0.70 |
| Promotion | 13.70 | 4.18 | 0.08 | -0.36 | 0.62 |
| Fringe benefits | 14.30 | 4.27 | 0.23 | -0.29 | 0.61 |
| Contingent rewards | 14.62 | 4.22 | -0.03 | -0.19 | 0.59 |
| Interest or enjoyment | 37.28 | 7.92 | -0.41 | -0.49 | 0.84 |
| Psychological meaningfulness | 11.81 | 5.06 | -0.95 | 1.17 | 0.93 |
| Autonomy | 24.05 | 4.99 | -0.13 | -0.13 | 0.66 |
| Trust in organisations | 56.44 | 16.52 | -0.32 | -0.60 | 0.95 |
| Trust in supervisors | 59.39 | 16.65 | -0.68 | -0.02 | 0.95 |
| Trust in co-workers | 58.02 | 16.08 | -0.75 | 0.26 | 0.96 |
| Work engagement | 72.62 | 17.81 | -0.60 | 0.06 | 0.93 |
| Total extrinsic rewards | 59.79 | 13.69 | 0.28 | -0.10 | 0.82 |
| Total intrinsic rewards | 73.27 | 9.42 | -0.03 | 0.12 | 0.65 |
| Total rewards | 133.23 | 19.56 | 0.26 | -0.02 | 0.81 |
| Total trust | 173.90 | 43.93 | -0.36 | -0.41 | 0.96 |

**TABLE 2:** Correlation coefficients of organisational rewards, workplace trust and work engagement.

| Item | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Extrinsic rewards | 1.00 | - | - | - |
| Intrinsic rewards | 0.42*[b] | 1.00 | - | - |
| Total rewards | 0.90*[c] | 0.77*[c] | 1.00 | - |
| Workplace trust | 0.68*[c] | 0.46*[b] | 0.69*[c] | 1.00 |
| Work engagement | 0.34*[b] | 0.53*[c] | 0.50*[c] | 0.52*[c] |

Practically Significant correlation, $r > 0.10$ (small effect).

[b], Practically significant correlation, $r > 0.30$ (medium effect); [c], Practically significant correlation $r > 0.50$ (large effect).

*, Statistically significant correlation, $p < 0.01$.

relationship with total rewards ($r = 0.77$; $p < 0.01$; large effect), workplace trust ($r = 0.46$; $p < 0.01$; medium effect) and work engagement ($r = 0.53$; $p < 0.01$; large effect), whereas total rewards have a statistically and practically significant relationship with workplace trust ($r = 0.69$; $p < 0.01$; large effect) and work engagement ($r = 0.50$; $p < 0.01$; large effect). Workplace trust produced a statistically and practically significant relationship with work engagement ($r = 0.52$; $p < 0.01$; large effect).

## Multiple regression analysis

In response to the secondary research questions on whether intrinsic and extrinsic rewards can predict workplace trust and work engagement, multiple regression analysis (using the method proposed by Field, 2013) was utilised.

Table 3 summarises the regression analysis with extrinsic rewards, intrinsic rewards and total rewards as predictors of workplace trust. Intrinsic rewards were entered in Step 1 and proved to be a statistically significant predictor of workplace trust, explaining 21% of the variance in workplace trust. Extrinsic rewards were entered in Step 2 and was also shown to be a statistically significant predictor of workplace trust, explaining an additional 49% of the variance in the total model [$F(2.241) = 118.41$, $p < 0.001$]. The model demonstrated that extrinsic and intrinsic rewards combined explained 70% of the variance in workplace trust. Regarding total rewards as a predictor of workplace trust, this variable was excluded from the rest of the analysis as it did not explain any additional variance.

Table 4 summarises the regression analysis with intrinsic rewards, extrinsic rewards and total rewards as predictors of work engagement. Intrinsic rewards were entered in Step 1 and statistically significantly predicted work engagement, explaining 28% of the variance. Thereafter, extrinsic rewards were entered in Step 2 and also statistically significantly predicted work engagement, explaining an additional 29% of the variance of the total model [$F(2.241) = 51.44$, $p < 0.001$]. The model indicated that intrinsic and extrinsic rewards combined explained 57% of the variance of work engagement. Regarding total rewards as a predictor of work engagement, this variable was excluded from the rest of the analysis as it did not explain any additional variance.

## Discussion

The study sought to explore the relationship between organisational rewards, workplace trust and work engagement within the South African employment context and also aimed to determine whether intrinsic and extrinsic organisational rewards were able to predict workplace trust and work engagement. The research results in accordance with the objectives of this study encapsulate what follows.

### The relationship between organisational rewards, workplace trust and work engagement

The first objective of this research study was to determine whether there is a relationship between organisational rewards, workplace trust and work engagement. Results revealed that the relationship between extrinsic rewards and workplace trust produced a correlation of 0.68 (large effect). A correlation of 0.46 (medium effect) was found between intrinsic rewards and workplace trust. Regarding the correlation between total rewards and workplace trust, a correlation of 0.69 (large effect) was found. The results indicated that the relationship between both intrinsic and extrinsic rewards, as well as total rewards and workplace trust, was statistically significant. This is an encouraging result indicating that organisations can utilise their reward structures to improve their employees' trust and work engagement levels and ultimately have a positive effect on other outcomes such as productivity, performance,

**TABLE 3:** Multiple regression of workplace trust as the dependent variable and intrinsic rewards, extrinsic rewards and total rewards as independent variables.

| Model | Rewards | Unstandardised coefficient | | Standardised coefficient (Beta) | $t$ | $p$ | $F$ | $R$ | $R^2$ | $\Delta R^2$ |
|---|---|---|---|---|---|---|---|---|---|---|
| | | B | SE | | | | | | | |
| 1 | Constant | 17.35 | 19.69 | - | 0.88 | 0.40 | 64.26 | 0.46 | 0.21 | 0.21 |
| | Intrinsic rewards | 2.14 | 0.27 | 0.46 | 8.02 | 0.00* | - | - | - | - |
| 2 | Constant | -11.36 | 15.95 | - | -0.71 | 0.48 | 136.57 | 0.70 | 0.50 | 0.49 |
| | Intrinsic rewards | 0.99 | 0.24 | 0.21 | 4.20 | 0.00* | - | - | - | - |
| | Extrinsic rewards | 1.90 | 0.16 | 0.59 | 11.69 | 0.00* | - | - | - | - |

*, Statistically significant, $p < 0.05$.

**TABLE 4:** Multiple regression of work engagement as dependent variable and intrinsic rewards, extrinsic rewards and total rewards as independent variables.

| Model | Rewards | Unstandardised coefficient | | Standardised coefficient (Beta) | $t$ | $p$ | $F$ | $R$ | $R^2$ | $\Delta R^2$ |
|---|---|---|---|---|---|---|---|---|---|---|
| | | B | SE | | | | | | | |
| 1 | Constant | -0.93 | 7.58 | - | -0.12 | 0.90 | 95.75 | 0.53 | 0.28 | 0.28 |
| | Intrinsic rewards | 1.00 | 0.10 | 0.53 | 9.79 | 0.00* | - | - | - | - |
| 2 | Constant | -3.65 | 7.60 | - | -0.48 | 0.63 | 5.40 | 0.55 | 0.30 | 0.29 |
| | Intrinsic rewards | 0.90 | 0.11 | 0.47 | 7.99 | 0.00* | - | - | - | - |
| | Extrinsic rewards | 0.18 | 0.08 | 0.14 | 2.32 | 0.02* | - | - | - | - |

*, Statistically significant, $p < 0.05$.

organisational commitment and job satisfaction. The findings are in line with previous research reporting that organisational rewards are related to workplace trust (Burke, 2002; Engelbrecht et al., 2014; Fehr & List, 2004; Ferrin & Dirks, 2004; Gneezy, Meier & Rey-Biel, 2011; Tzafrir, 2005; Van der Berg & Martins, 2013).

One can, therefore, infer that higher levels of organisational rewards (intrinsic, extrinsic or both) imply a higher degree of workplace trust. A potential explanation of this finding is that organisations that promote a high trust climate are more likely to reward employee effort on the job through the use of intrinsic and extrinsic rewards. In particular, organisational leaders who trust their subordinates may be more likely to perceive them as valuable and, as such, take measures to nurture and develop their loyalty (Philips, 1997; Chen, Hwang & Liu, 2012). Developing and nurturing employee loyalty may be generated intrinsically through providing employees with meaningful work, autonomy and tasks, which reap interest or enjoyment and extrinsically through providing employees with recognition and through rewarding exceptional performance by means of increasing pay, promoting employees and providing them with higher levels of fringe and contingent rewards and other benefits. Another possible explanation of this relationship may be that employees who have high levels of trust in their supervisors, co-workers and organisation may be more productive (Sonnenberg, 1994). This can further signify higher extrinsic rewards (such as pay increases) as a result of heightened productivity and being appraised on a performance basis (Njanja, Maina, Kibet & Njagi, 2013).

## The relationship between organisational rewards and work engagement

The relationship between organisational rewards and work engagement has extensively been explored (Hotz, 2014; Hulkko-Nyman et al., 2014; Jacobs et al., 2014; May et al., 2004; Rothmann & Rothmann, 2010; Schaufeli & Bakker, 2003; Thomas, 2009; Zhijian & Tianshu, 2013). The findings in this study demonstrated that different types of organisational

rewards, both extrinsic and intrinsic, have a statistically and practically positive relationship with work engagement. These findings support previous research, which found similar results (Jacobs et al., 2014; May et al., 2004; Rothmann & Rothmann, 2010; Schaufeli & Bakker, 2003; Thomas, 2009).

In addition, a statistical significant correlation between total rewards and work engagement was reported, providing further support to previous findings (Hotz, 2014; Ram & Prabhakar, 2011; WorldatWork, 2006).

Based on the result, it can be potentially inferred that the higher the organisational reward (intrinsic and extrinsic), the more engaged employees will be in their work. Interestingly, similar to the findings of Schaufeli and Bakker (2003) and Thomas (2009), intrinsic rewards produced the highest correlation with regard to work engagement. When employees are provided with higher levels of intrinsic rewards, they tend to exert more effort, dedication and involvement in their work.

## The relationship between workplace trust and work engagement

As outlined in the literature review, many authors support the idea that workplace trust and work engagement are related (Chughtai & Buckley, 2008; Engelbrecht et al., 2014; Ferrin & Dirks, 2004; Hassan & Ahmed, 2011; Men, 2015; Mone & London, 2010; Ugwu et al., 2014). In the current study, a statistically significant correlation (large effect) was found between workplace trust and work engagement. This implies that the higher employees' level of workplace trust is, the higher their level of engagement in their work would be.

This may be due to employees perceiving that there are additional resources such as support and instrumental assistance available to them, which they could potentially draw upon when needed. For example, when employees perceive their superiors to be competent, they are likely to possess more trust, confidence in and reliance on them when and if job-related challenges do arise (Chughtai & Buckley,

2008; Costigan et al., 1998). This highlights that potential future research can explore the influence that various other job characteristics, such as work resources, may have on the relationship between workplace trust and work engagement.

## Organisational rewards as predictors of workplace trust

The secondary aim of this study was to determine the predictive significance of organisational rewards on workplace trust and work engagement.

Results indicated that both intrinsic and extrinsic rewards significantly predicted workplace trust. Intrinsic rewards explained 21% of the variance in workplace trust and adding extrinsic rewards, an additional 49% of the variance was explained. The results highlight the importance of ensuring adequate reward structures to ensure a trusting working environment.

Ferrin and Dirks (2004) observed that organisational rewards can have a strong and predictable influence on workplace trust and in particular, interpersonal trust, as rewards can influence trust by means of altering an employee's perception about the motives of others and subsequently evaluate their behaviours based on reward structures.

Tzafrir (2005) found that when superiors perceived their subordinates to be trustworthy, they were willing, and thus, more likely to increase employee compensation and incentive plans. From an employee's perspective, Fehr and List (2004) found that if employees perceive their extrinsic rewards in a more negative light, their incentives may reap a negative influence on certain behaviours, one of them being a decline in trust. From this finding, it can be potentially inferred that when employees perceive their extrinsic rewards in a more optimistic light, a positive influence on trust can be generated.

## Organisational rewards as predictors of work engagement

The final objective of this research study was to determine whether organisational rewards were able to predict work engagement. Similar to workplace trust, the results demonstrated that both intrinsic and extrinsic rewards significantly predicted work engagement. Intrinsic rewards explained 28% of the variance, and extrinsic rewards explained an additional 29% of the variance.

The results were in line with previous findings, which suggested that organisational rewards can predict work engagement (Gujral & Jain, 2013; Maslach, Schaufeli & Leiter, 2001; May et al., 2004; Ram & Prabhakar, 2011; Roberts & Davenport, 2002; WorldatWork, 2006). Some evidence suggests that employees are more inclined to be engaged in their work when placing high value on intrinsic rewards and when they perceive and feel that that the organisation 'cares' about them at work (Obicci, 2015; Ozütku, 2012; Silverman, 2004).

In terms of extrinsic rewards, employees who feel rewarded and recognised for their efforts may feel more satisfied and, therefore, exert more effort and engagement in their work (Waqas & Saleem, 2014). The social exchange theory supports this result, which holds that when employees are rewarded for their work efforts, they participate in an exchange of providing their organisation with increased work engagement (Gujral & Jain, 2013). In light of both rewards, a rewarding work environment can help employees to be more engaged at work (Roberts & Davenport, 2002).

## Limitations

Throughout this study, several limitations were identified. Firstly, the cross-sectional research design may serve as a limitation as it makes it difficult to determine causal inferences about the relationships between the three constructs. Secondly, to collect data from participants, the collection method relied exclusively on self-report measures. The utilisation of this method could potentially lead to social desirability bias as respondents may have had the tendency to respond in a more socially acceptable and positive light. Thirdly, the sample size was relatively small ($n = 251$) and data were only collected within the Gauteng region. This may have limited the generalisability of the findings. The fourth limitation of the study encapsulates the relatively low reliabilities of the promotion, fringe benefits and contingent rewards subscales used to measure extrinsic rewards. Particularly, the alpha coefficients did not meet the intended cut-off value of $> 0.70$. A possible explanation for this could be that these variables were measured using subscales adapted from the JSS and only contained four items each. The final limitation regards the scales utilised to measure organisational rewards. Unfortunately, access to instruments for measuring both intrinsic and extrinsic rewards proved challenging. Limited rewards instruments are available.

## Recommendations

In light of the findings, conclusions and limitations of this particular study, a number of possible recommendations for future research may be made. A significant recommendation would be to acquire a larger sample size from a vast array of demographical regions to generalise the findings to the broader South African context. Furthermore, a longitudinal study could be employed to determine whether the relationships between organisational rewards, workplace trust and work engagement remain stable across time. This could further include looking at the correlations and regressions between the subscales of workplace trust and work engagement, individually, to determine with more accuracy, the particular factors that are related to and predict these two constructs.

In addition, it is recommended that the impact that organisational rewards have on other variables such as job satisfaction, employee loyalty, motivation and commitment be explored as these could prove useful and valuable within the talent management domain. It might also be valuable and

interesting to determine whether additional factors such as gender and age moderate this relationship. The final recommendation for this study would be to develop and validate instruments for the measurement of both intrinsic and extrinsic rewards that can ultimately be made readily available to researchers, academics and scholars within the management and behavioural sciences. As such, the above recommendations would prove valuable to human resources practitioners and industrial psychologists who wish to better their current employee strategies.

## Practical implications

The study proved useful in that it provided insight into the influence that organisational rewards may have on workplace trust and work engagement. As outlined earlier in the study, these variables all play a substantial role in retaining employees. These findings are significant in that they may contribute towards improving talent management strategies, particularly, within volatile and competitive business environments, where organisations are faced with the challenge of retaining employees who fall within a scarce talent pool.

The study provided insight into the amount of interest and value that employees place on organisational rewards in their pursuit of seeking trust in their supervisors, co-workers and organisations as well as in engaging in their work. The study thus not only contributed to the existing body of knowledge but also provided significant findings, which could assist scholars, researchers and managers in better understanding the relationship between organisational rewards, workplace trust and work engagement as well. Furthermore, the findings provided a platform for future researchers to explore these relationships more intricately.

## Conclusion

This study found that in the 21st century world of work, although extrinsic rewards are important to heighten trust and engagement within the workplace, intrinsic rewards should not be overlooked, as the modern workforce is increasingly intrinsically driven. In particular, a moderate-to-strong positive relationship was found between rewards, trust and work engagement, and that rewards (and more so, intrinsic rewards) were able to predict workplace trust and work engagement.

The significance of exploring organisational rewards is that, in previous years, research found a link to various outcomes such as employee loyalty, performance and job satisfaction. With high turnover rates and poor economic conditions, reward practices have been in the spotlight due to organisations drastically cutting down on their costs and expenditure. This has further led to a reduction in outcomes such as in the levels of both engagement and confidence that employees portray at work. Over the past few years, linking organisational rewards with workplace trust and work engagement has thus become significant. Through exploring the influence that rewards might have on trust and engagement in the workplace, this study further provided relevant insight into how management and other behavioural specialists could make use of tangible, non-tangible and psychological rewards to enhance human-related strategies for the purpose of heightening employee retention within the modern world of work.

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### Authors' contributions

C.H. was the supervisor of the research study. She was responsible for making conceptual contributions to the study, data analysis and writing of the article. J.V. was responsible for conceptual contributions to the study; she was the main contributor to the literature review and was responsible for data collection, data capturing and some statistical analyses.

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# Multiculturalism in the workplace: Model and test

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**Orientation:** This article addresses the role of multiculturalism in employee attitudes.

**Research purpose:** It proposes a model of positive features of multiculturalism in organisations and tests it in South Africa. The model postulates three levels in multiculturalism: antecedent conditions, such as multiculturalism practices and norms that define the diversity climate; mediators, such as diversity-enhancing employee attitudes; and positive work outcomes.

**Motivation for the study:** South Africans from diverse backgrounds hardly meet in their private spaces. Given this forced contact in the workplace and the calls for national unity and social cohesion, we propose that a workplace that is characterised by mutual respect, accommodation and tolerance for difference could have a positive impact on employee work attitudes.

**Research approach/design and method:** A quantitative approach was adopted using survey questionnaires that were distributed to employees selected on the basis of convenience sampling ($N = 299$) in various workplaces.

**Main findings:** A multi-group path analysis confirmed the validity of the model for the white, black and mixed race ethnic groups. Although the differences were negligible to medium, white groups seemed to experience a slightly more favourable multicultural environment compared to black and mixed race groups.

**Practical/managerial implications:** All dimension scores were well above the mid-point of the scale, which suggests that psychometrically speaking, the multicultural climate, ethnic integration orientations and employee attitudes are experienced by these employees as favourable.

**Contribution/value-add:** From a conceptual perspective, the model implies that the more distal variable of a multicultural climate influences employee attitudes through a set of more proximal integration attitudes and practices. From a practical perspective, an inclusive climate has more distal characteristics such as the general multiculturalism climate and more proximal characteristics such as ethnic vitality.

## Introduction

We are interested in the role of multiculturalism (referring to the recognition and support of the plural nature of the society; Berry & Kalin, 1995) in employee attitudes in the workplace. South Africa is an interesting location to study diversity in organisations, given the country's history of racial segregation and discrimination. The system of apartheid, the legal basis of this segregation and discrimination, was abolished in 1994. The promulgation of various post-1994 laws, such as the *Labour Relations Act 66 of 1995* (RSA, 1995), the *Employment Equity Act No 55 of 1998* (RSA, 1998) and the *Basic Conditions of Employment Act No 75 of 1997* (RSA, 1997b), was aimed at demolishing discrimination, enhancing national cohesion and the creation of a rainbow nation (a term framed by Bishop Desmond Tutu to refer to the multi-ethnic composition of the South African society). These developments have resulted in increments in intercultural contacts in the workplace. However, South African employees often encounter two types of diversity in the workplace. Firstly, the business world as currently conceptualised and structured in most South African corporations is generally cast in a Eurocentric mould (Khoza, 1993), which largely resembles features of white domination of the pre-1994 era. This mould is quite different from the home culture, notably for the black groups. Secondly, because of the still rampant segregation of society, work is the only place where many South Africans meet individuals from other ethnic groups (Hofmeyr, 2006; Jackson & Van de Vijver, 2018). Given this forced contact in the workplace, calls of the new Constitution (RSA, 1996) for national unity and social cohesion, this contribution proposes that a workplace that is characterised by mutual respect, accommodation and tolerance for difference could have a positive impact on employee work attitudes and output.

Unfortunately, recent research results (Stoermer, Hitotsuyanagi-Hansel, & Froese, 2017) suggest that black South Africans are still prone to become targets of workplace racial harassment and that fault lines based upon skin colour persist. Consequently, racially harassed employees report lower degrees of job satisfaction (Stoermer et al., 2017). This, in return, can lead to voluntary turnover (Porter, Steers, Mowday, & Boulian, 1974) and decrease individual performance (Harter, Schmidt, & Hayes, 2002). This prevents organisations from maximising their competitive edge (Earley & Mosakowski, 2000). South African organisations need to take action to foster cooperation and trust among employees of different racioethnicities (Stoermer et al., 2017). One remedy is establishing an organisational inclusion climate (Nishii, 2013; Stoermer, Bader, & Froese, 2016).

This contribution aims to heed this call and to encourage interdisciplinary research, and it therefore proposes and tests a model of multiculturalism in the workplace. The model of this study is based on a mediating model of acculturation (Arends-Tóth & Van de Vijver, 2006), the interactive acculturation model (IAM) (Bourhis, Moïse, Perreault, & Senécal, 1997) and the interactional model of cultural diversity (Cox, 1993). The model holds that multiculturalism comprises three components: *antecedents* defining a climate of diversity-enhancing conditions such as multicultural policies and practices as supported by the majority in the workplace, *mediating conditions* comprising employee (and people from his ethnic group) orientations towards integration and employee *outcomes* comprising subjective experiences of work success, commitment and job satisfaction. Not only does this article fill the gap in the literature regarding the role of multiculturalism in employee attitudes in the South African workplace but it also addresses the call of Bourhis et al. (1997) to investigate the role of both mainstream (multicultural or diversity-enhancing conditions or requirements at work) and minority contextual features (integration orientation at work) and attitudes simultaneously. In addition, empirical evidence on the positive effects of multiculturalism in the workplace could be just the recipe for encouraging management (currently, mainly white) to facilitate and promote diversity initiatives in South African organisations.

## Literature review

### Models, typologies, strategies, definitions and benefits of multiculturalism

Psychological literature on acculturation has focused on the ways in which majority attitudes towards multiculturalism impact on the acculturation strategies of migrants. The most widely cited model of acculturation has been developed by Berry (e.g. 1997, 2001, 2005, 2008, 2011). According to Berry's model, when migrants enter a new cultural environment, they are faced with two questions: (1) whether they wish to maintain their affiliation with the culture of their country of origin and (2) whether they wish to forge relations with the dominant culture of the society they are entering. Depending on how migrants respond to these two issues, they are said to employ one of four acculturation strategies: not wanting to maintain one's cultural identity but seeking contact with the dominant group (assimilation), avoidance of interaction with the dominant group and placement of value on maintaining one's original culture (separation), little possibility or interest in cultural maintenance and relating to other cultures (marginalisation) and maintenance of one's original culture while also pursuing contacts with the dominant group (integration) (Berry, 2013).

According to Ojukwu and Oni (2017), multiculturalism embodies and promotes cultural security, cultural diversity and cultural equity. Cultural security is a broad concept that encompasses cultural safety, cultural sensitivity and awareness. Cultural safety refers to the condition in which people recognise their own culture, language, customs, attitudes, beliefs and preferred ways of doing things in their social and economic environment (IACIU, 2014:6).

Multiculturalism has been policed, particularly in Europe, to create national unity in ethnic diversity (Johnson, 2015). As such, it has been criticised for essentialising culture and reifying cultural differences (Howarth & Andreouli, in press). The criticisms multiculturalism faces are many and varied (Mason, 2018). It presupposes an essentialist conception of culture that treats cultures as static, homogeneous and bounded, with the result that multicultural policies tend to entrench traditional practices and promote the interests of established elites within cultural communities (Barry, 2001; Kukathas, 2003); that it gives unfair advantages to minority cultural and religious groups through additional funding and special provisions such as exemptions from laws and policies (Barry, 2001); that it is bad for women (Okin, 1999); and that it discourages cultural communities from integrating and encourages them to form separate parallel societies (Goodhart, 2013; West, 2013). Ironically, multicultural initiatives can produce scepticism and resentment on the part of, in particular, non-minorities (James, Brief, Dietz, & Cohen, 2001) and criticism centres on the claim that it excludes non-minorities, threatens unity (Plaut, Sanchez-Burks, Buffardi, & Stevens, 2007) and promotes separatism and division (Frederickson, 1997). Exclusion from organisational information and decision-making networks has been identified as one of the most significant problems facing today's diverse workforce (Fernandez, 1991; Morrison & Von Glinow, 1990; O'Leary & Ickovics, 1992). The inclusion–exclusion experience of diversity is one that has deep social–psychological roots for human beings (Baumeister & Leary, 1995).

This is in contrast to the use of the term to describe a situation in society where diversity is widely accepted and valued, by all ethnocultural groups, and where cultural groups maintain their ethnic and cultural distinctiveness while still participating in the daily life of greater society (Berry, 2013; Sam, 2006). In addition, Howarth and Andreouli (in press) propose that multiculturalism should be studied as a social representation, that is, a collectively shared system of 'values, ideas and practices' (Jovchelovitch 2007; Moscovici 1973, p. xiii; 2000; Wagner & Hayes, 2005).

Ramakrishna (2013, p. 100) argues that multiculturalism is 'the representation of difference'. By this, multiculturalism means accepting and tolerating differences in cultural identities and promoting ways of peaceful coexistence. Rosado (1996) explicitly defines multiculturalism as:

> a system of beliefs and behaviours that recognizes and respects the presence of all diverse groups in an organization or society, acknowledges and values their socio-cultural differences, and encourages and enables their continued contribution within an inclusive cultural context which empowers all within the organization or society. (p. 2)

Therefore, multiculturalism can be described as a behavioural pattern that appreciates, tolerates and promotes multiple cultures and identities situated within the confines of a particular community. These explanations infer that multiculturalism is a reactionary movement or ideology purposed to resolving the challenges of colour difference, cultural diversity and social inequality through an attitude of acceptability, hospitality, tolerance and love (Olanrewaju, Loromeke, & Adekoye, 2017).

In general, intercultural contact of higher quality predicted more positive intergroup attitudes, trust, more positive perceptions of out-group intentions in working towards peace (Tropp et al., 2017). More specifically, managing and valuing diversity enhances the performance (Choi & Rainey, 2010; Mazibuko & Govender, 2017). Workplace diversity is associated with higher organisational benefits (Joubert, 2017). For instance, cultural diversity is associated with organisational advantages, such as strengthening the organisation's culture, improving the company's global reputation, increasing creativity and innovation or building loyalty among customers of different origins (Cox & Blake, 1991; Franken, 2015; Shen, Chanda, D'Netto, & Monga, 2015; Thomas & Ely, 1996). It is also associated with increases in productivity, goal attainment, creativity, client focused services and an interesting work environment (Joubert, 2017) as well as work team cohesion (Cashmore, 2003; Trivedi, 2008). In addition, when diversity is managed effectively, employees learn more about each other so that communication is improved, with less stereotyping and discrimination among the employees (Joubert, 2017). Organisations promoting initiatives based on a multicultural ideology can be expected to be particularly attractive to minorities, because diversity is acknowledged and retained (Verkuyten, 2005).

Nonetheless, not all people might experience the workplace positively (Jackson & Van de Vijver, 2018). For instance, women of all races are overrepresented in pink-collar jobs (Jaga, Arabandi, Bagraim, & Mdlongwa, 2017). Sue and Capodilupo (2008) reported that women experience a variety of gender microaggressions and discrimination that undervalue their work contributions. Older workers were likely to be channelled to lower paid jobs than young workers, potentially affecting their standard of living (Drydakis, MacDonald, Chiotis, & Somers, 2018). About 16% – 68% of lesbian, gay, bisexual and transgender individuals reported experiencing employment discrimination, with 41% being harassed at work and gay men earned 10% – 32% less than equally qualified heterosexual men (Badgett, Lau, Sears, & Ho, 2007). Durrheim and Talbot (2012) and Moloto, Brink and Nel (2014) reported racial stereotypes prevalent among all four South African race groups (i.e. black, white, Indian and mixed race). Another study found that stereotypes also exist about both race and gender groups occupying managerial positions (Booysen & Nkomo, 2010).

Given the challenges above, efforts must be speeded up to provide answers to the problematic issues that arise as a result of frequent intercultural interaction in the workplace and in society. Interdisciplinary research could provide some of the answers that we so desperately need. Service research is also especially apt for interdisciplinary as service is not developed by any one function in a company; it is a purpose in some way for everyone across the organisation regardless of where they are working. It is strange then that we have not advanced further on interdisciplinary research, particularly because it has been in focus for a long time in the field (Gustafsson & Bowen, 2017). Never before has cooperative research been as necessary among scholars and practitioners as in the case of inclusion (Wooten & James, 2008). The greatest advances in human resources (HR) practices have resulted from the joint activities of scholars and practitioners (Shore, Cleveland, & Sanchez, 2018).

## A model of multiculturalism in the workplace

It is a novel feature of this contribution that it studies diversity from an acculturation perspective, as acculturation is a productive way of examining adjustment processes faced by individuals who come into continuous contact with other cultural backgrounds (Berry, 1997). This theoretical framework combines a mediation model of acculturation in the broader society (Arends-Tóth & Van de Vijver, 2006) and in the workplace (Jackson, Van de Vijver, & Ali, 2012). Antecedents in the model, called multiculturalism or diversity-enhancing conditions, refer to contextual conditions that define the climate of the workplace *vis-à-vis* diversity, such as descriptive norms and practices about the need to acknowledge, respect, appreciation of multiculturalism and tolerance of culturally diverse group. Mediating variables, called ethnic integration, refer to the various aspects that, as a consequence of a positive diversity climate, promote integration that refers to retaining your own identity and freely interacting with people from different ethnic backgrounds. Integration is a combination of attitudes and practices that maintain the own ethnic identity (such as ethnic vitality) and attitudes and practices that promote multiculturalism (interaction and contact with people from your own and other ethnic backgrounds) and the need to adopt a multicultural identity (such as pressure by co-ethnics to embrace multiculturalism at work). Outcomes in the model are represented by employee attitudes such as job satisfaction, organisational commitment (psychological diversity outcome indicators) and perceived subjective experience of work success (sociocultural diversity outcome indicator).

**Antecedent conditions**

The coexistence and integration of the diverse cultures represented in the workforce are important in multiculturalism. Multiculturalism conditions have an impact on intercultural interaction and the adjustment in the workplace. Research has recently confirmed contextual influences (such as the degree of multiculturalism in the workplace) on ethnic diversity orientations; ethnic vitality and an integration orientation play a crucial role in these orientations, which are supposed to influence adaptation and intergroup relationships (Jackson & Van de Vijver, 2018; Jackson et al., 2012). As antecedent or diversity-enhancing conditions, this study focuses on perceived institutional or majority support for multiculturalism and mainstream tolerance.

*Perceived multicultural norms* refer here to rules and codes of conduct that emphasise acknowledgement, respect and appreciation of cultural differences in the workplace (e.g. the majority members in the organisation believe that people from different ethnic backgrounds should be respected), while *perceived multicultural practices* refer to the actual co-employee behaviours *vis-à-vis* diversity in the workplace (e.g. the majority members in the organisation respect people from different ethnic backgrounds). According to Berry (2006), although support for multiculturalism may be conceptually similar to tolerance, multiculturalism attitudes are more related to the idea that diversity is a resource for a society, and that all ethnocultural groups should be mutually accommodating to obtain harmonious relationships in a culturally plural society. Empirically, support for multiculturalism was correlated with dominant group members' tolerance (Berry, 2006; Jackson & Van de Vijver, 2018; Jackson, Van de Vijver, & Biela, 2013a), while support for multiculturalism strongly predicted social tolerance (Van der Noll, Poppe, & Verkuyten, 2010).

*Perceived mainstream tolerance* refers to the condition of not being uncomfortable with others' existences with regard to different language, gender, religion, belief and attitude (Sahin, 2011). Tolerance has also been demarcated as a preparedness to give up unlikable thoughts or groups (Gibson, 2006). Contemporary scholars outline tolerance as diversity esteem, openness, inclusiveness of all ethnicities, races and walks of life and cultivating oneself to respect others (Corneo & Olivier, 2009; Florida, 2003; Ramadan, 2010). Tolerance here refers to acknowledgement, acceptance and lenience towards cultural differences. Tolerance is an attitude towards social equality and egalitarianism (Berry, 2006). Ethnic tolerance is opposite to ethnocentrism that tends to favour one's in-group over out-groups (Berry & Kalin, 1995), whereas social egalitarianism involves intolerance for social dominance orientation, supporting equal opportunities and rights (Berry, 2006). Multicultural practices and norms and mainstream tolerance in the workplace are associated with lower levels of physical and psychological ill health as well as increased subjective experiences of work success (Ait Ouarasse & Van de Vijver,

2004; Jackson & Van de Vijver, 2018; Jackson et al., 2012) and satisfaction with life (Jackson et al., 2013a). Research also found that a multicultural ideology was related to an integration strategy (Hui, Chen, Leung, & Berry, 2015).

**Mediating conditions: Ethnic integration norms at work**

According to Bourhis et al. (1997), a common shortcoming of acculturation models is the lack of importance given to how the host community and the integration policy of the state can shape especially the acculturation preferences of minority group members. The IAM, proposed by Bourhis et al. (1997), suggests that the acculturation orientations of ethnic minority members are related to the acculturation orientations of host majority members and should be emphasised and included in empirical studies. Integration involves some degree of maintenance of the home culture, while at the same time, members of an ethnic cultural group seek to participate as an integral part of the larger social (diverse) network (Berry, Poortinga, Breugelmans, Chasiotis, & Sam, 2011). Ethnic integration norms at work (Jackson et al., 2012), individual integration orientation (Jackson & Van de Vijver, 2018; Jackson et al., 2012) and ethnic vitality (Ait Ouarasse, 2004) are the variables from the minority context that have been reported to bear on acculturation outcomes that are considered in this contribution.

In this study, *perceived ethnic integration norms at work* refer to the pressure or expectation from own ethnic members to retain one's own culture, but also to participate in and adopt the culture of the workplace, which combines a largely European business culture and a plural ethnic culture among colleagues (the latter concept is known in South Africa as the rainbow nation). Integration is often seen as the best way for an individual to deal with differences between important cultures for the person such as the home and diverse culture of the workplace (Berry, 2003). Positive relations between ethnic integration norms, and multiculturalism, mainstream tolerance, subjective experiences of success at work as well as lower levels of ill health, have been reported (Ait Ouarasse, 2004; Jackson et al., 2012).

*Individual integration acculturation orientation*, in Berry's (1997) bi-dimensional model, refers to an immigrant's preference to maintain his own culture, but also to participate in the mainstream culture. In the context of the present study, integration refers to individual preferences in the workplace to have contacts with own but also other ethnicities. Berry (1997) has argued that integration is the individual-level orientation that corresponds to multiculturalism at organisational or societal level. Research has often shown that integration is the orientation most favoured by minority members (Pham & Harris, 2001; Zagefka & Brown, 2002). A recent study confirmed positive relations between an individual integration acculturation orientation and multiculturalism, mainstream tolerance, ethnic integration norms at work and subjective experiences of work success as well as a negative relation with physical and psychological ill health (Jackson & Van de Vijver, 2018; Jackson et al., 2012).

The concept of *ethnic vitality*, adapted from linguistics (Harwood, Giles, & Bourhis, 1994), refers to ethnic institutions that can support the diversity process, such as the availability of places of worship, shops, recreational opportunities and educational resources for specific ethnic groups (Adelman, 1988; Galchenko, 2006; Malewska-Peyre, 1982). Perceived ethnic vitality refers in the present study to the availability of services for diverse groups in an organisation, such as availability of and catering for ethnic specific food and freedom to engage in ethnic practices (language usage, clothing and prayers), which are the consequences of support for a multicultural climate, as implemented in diversity policies. A minority that is vital and supportive acts as both springboard from which minority individuals can deal with the mainstream culture, which is seen in the positive effect on relationships and work success, and as a safety net that provides support to deal with negative acculturation experiences, which is performed indirectly via relationships with co-ethnics (Jackson, Van de Vijver, & Molokoane, 2013). Positive relations between perceived ethnic vitality, social relations, school success, mental health (Ait Ouarasse, 2004), multiculturalism, tolerance and approach coping style and work success have been confirmed in the research (Jackson et al., 2013b).

### Diversity outcomes: Employee attitudes and performance

In the acculturation literature, outcomes are often grouped under two major types: psychological outcomes and sociocultural outcomes (Ward, Bochner, & Furnham, 2001). The psychological outcomes of acculturation are mainly studied in the stress and coping tradition and refer to mental health and general satisfaction with life in the host milieu. Sociocultural adaptation, on the other hand, is studied in the culture learning tradition, and is mainly a matter of successful participation in the host society. In the present study, the focus is on employee attitudes, such as job satisfaction and organisational commitment, as well as subjective experiences of work success as indicators of psychological and sociocultural diversity outcomes, respectively. Psychological adaptation was positively correlated with an integration strategy and multicultural ideology, while sociocultural adaptation was positively correlated with an integration strategy (Hui et al., 2015).

*Job satisfaction and organisational commitment* represent psychological diversity outcome indicators in this contribution. Addressing the needs or challenges of a diverse workforce is important for maintaining positive work attitudes in employees, particularly *job satisfaction* (Stoermer et al., 2017), which is one of the central determinants of crucial work-related outcomes, such as organisational commitment, employee performance or turnover (Zimmerman, 2008). In their meta-analysis on the effects of perceived organisational support (POS), Rhoades and Eisenberger (2002) showed the beneficial effects of POS on several employee outcomes, for example, affective commitment, job satisfaction and extra-role performance. Perceived organisational support signals to employees that the organisation is taking care of their needs

beyond legal requirements. The positive association between multiculturalism and job satisfaction has been confirmed empirically in South Africa (Jackson et al., 2012). In addition, research has confirmed that women's minority status in the mining industry places them at greater risk of poorer mental health and job satisfaction than their male colleagues because of their lower social status, less social support and less social integration in the industry (Penhaligon, Louis, & Restubog, 2013; Seeman, 1996; Skaalvik & Skaalvik, 2011; Thoits, 2011).

The effect of diversity management on employees' *affective commitment* can partially be explained by its impact on the inclusiveness of the organisational culture (Ashikali & Groeneveld, 2015). Perceptions of inclusion and fair treatment, which are features of multiculturalism, have been found to predict both organisational commitment and job performance (Cho & Mor Barak, 2008). Moreover, models of inclusion treat affective commitment as an outcome of diversity management for all employees because they rest upon the assumption that individuals need to fulfil their need for belongingness and uniqueness. This is, in fact, the goal of diversity training: to select and effectively manage diverse employees by valuing their uniqueness while increasing their sense of belonging to and identifying with the organisation (Ashikali & Groeneveld, 2015; Shore et al., 2011). Organisations endorsing a diversity climate should be regarded as serving employees from all ethnicities (McKay et al., 2007).

*Perceived subjective experience of work success* is a sociocultural diversity outcome indicator in this study, which refers to the extent employees perceive that they are meeting and exceeding standards, and that they are performing well at work. The concept also refers to the respect that employees earn from co-workers as consequences of being successful at work. Work success relates positively with multiculturalism and tolerance (Jackson & Van de Vijver, 2018; Jackson et al., 2012, 2013) and negatively with diversity-inhibiting conditions, such as subtle racism, discrimination and segregation demands (Jackson & Van de Vijver, 2018; Jackson, Van de Vijver, & Burckard, 2011; Jackson et al., 2013a).

The aim of the present study was to test the feasibility of a conceptual model of multiculturalism in the workplace. More specifically, the following hypothesis was tested:

- **Hypothesis 1:** The same mediation model of multiculturalism (with positive associations between positive diversity conditions or antecedents, mediating variables and employee outcomes) holds for the white, black and mixed race groups.

### Group differences in support for multiculturalism in South Africa

Recent national and international surveys of ethnic differences in opposition to such policies suggested an element of group self-interest at play in the policy attitudes (Durrheim, 2010; Van de Vijver, Breugelmans, & Schalk-Soekar, 2008). Members of the group who had most to gain from the policies (usually the groups with the least power

in society) rated them most favourably, whereas members of the group who had most to lose rated the policies most negatively. It is argued that this type of reasoning does not apply to South Africa. White people still remain in a much stronger economic position compared to black people in that they are still the dominant group in the economic sense, being the most affluent group with the highest positions in organisations; therefore, white people are served best by a policy that does not threaten their position. Given the poor progress of representation of black people and women in top positions in the organisation, it is argued that extant business practices that still favour white people will not threaten the dominant position of the white group in the South African workplace. It is only through measures of affirmative action (AA) and Broad Base Black Economic Empowerment (BBBEE) policies and other forms of positive discrimination or preference to previous disadvantaged groups (black people, women and the people with disabilities) that the dominant position of the white groups is challenged.

It is not surprising that once the beneficiaries and power wielders of the apartheid state, Afrikaners in particular, found that their 'worldview … imploded' (Steyn 2004, p. 143), and that the opposition to these measures of white groups is strong (Herman, 2000). This is confirmed in studies showing that, in the aftermath of the racial state's demise, white communities struggle to come to terms with their 'new' minority status (Alsheh & Elliker 2015), try to maintain white privilege in the face of black power (Steyn & Foster 2008) or work to 'rehabilitate an ethnic whiteness in distress' (Blaser & Van der Westhuizen 2012, p. 385).

The reality, however, paints a different picture. As a result of their dominant position in the workplace, white people still experience the recent South African diverse workplace more positive compared to non-white people despite recent legislative changes such as the *Employment Equity Act* (RSA, 1998) and the use of AA policies that favour non-white people in both private and public institutions (Jackson et al., 2011, 2012). This is also supported by the overrepresentation of white people in top management positions in the South Africa (Department of Labour, 2017). Africans constituted less than 14.4% of top management in 2016, yet they constitute 78% of the workforce of the country. Mixed race constituted less than 4.9% of top management in 2016, yet they constitute 9.8% of the workforce of the country. Indians constituted less than 8.9% of top management in 2016, yet they constitute 2.8% of the workforce of the country. White groups constitute 68.5% of top management in 2016, yet they constitute only 9.5% of the workforce (Department of labour, 2017). Another aim of this study was for ethnic group differences in components of the model. More specifically, given the aforementioned, we tested the following hypothesis:

- **Hypothesis 2:** White employees score significantly higher in multiculturalism and mainstream tolerance, ethnic vitality, ethnic integration and positive employee attitudes compared to black employees.

# Research methods
## Research approach

This research began with a quantitative approach, followed by a cross-sectional survey design whereby a sample was drawn from a population at one point in time, and this sample was used to obtain the research objectives. Cross-sectional designs are appropriate where groups of participants, at various stages of development, are studied simultaneously, whereas the survey technique of data collection gathers information from the target population by means of questionnaires (Burns & Grove, 1993). This design is used to assess interrelationships among variables within the population. Survey questionnaires were distributed to employees selected on the basis of convenience sampling in various workplaces in South Africa.

## Procedure

The Economic and Management Faculty's Ethics Committee of North-West University approved the study. These employees were mostly the colleagues and co-workers of network members and acquaintances. In addition, permission was acquired through formal verbal requests to line managers during visits to various workplaces to gather data from employees not acquainted with the researcher filling out the questionnaires. Participants completed consent forms. The purpose, anonymity and voluntary nature of the research and its advantages were explained to prospective participants after permission was granted during lunch break briefings. Participants were given two weeks to complete the questionnaires, which could be dropped in a sealed box in the HR section that was later collected by the researcher.

## Sampling and participants

Using convenience sampling, participants from different workplaces in South Africa were approached. Characteristics of the participants are presented in Table 1. The sample ($N$ = 299) consisted mainly of female employees (55.35%) in the age range of 26–33 years (40.67%). Approximately one-third (34.56%) were mixed race employees, 33.33% were black employees, 23.55% were white employees, 7.95% were

**TABLE 1:** Participant characteristics.

| Item description | Category | Frequency | Percentage |
|---|---|---|---|
| Gender | Male | 135 | 45.2 |
| | Female | 164 | 54.8 |
| Age | 18–25 | 74 | 24.7 |
| | 26–33 | 120 | 40.1 |
| | 34–41 | 72 | 24.1 |
| | 42–49 | 22 | 7.4 |
| | 50–60 | 11 | 3.7 |
| Ethnic group | White | 77 | 25.8 |
| | Black | 109 | 36.5 |
| | Mixed race | 113 | 37.8 |
| Educational qualifications | Grade 12 | 96 | 32.1 |
| | Certificate | 73 | 24.4 |
| | Diploma | 71 | 23.7 |
| | Degree | 34 | 11.4 |
| | Postgraduate | 22 | 7.4 |

Indian and 0.61 indicated other; 30.89% of the employees held a grade 12 or National Senior Certificate (corresponding to completed secondary school or higher).

## Measurements

Some instruments with well-established psychometric properties used in other cultural contexts were adapted (Ait Ouarasse & Van de Vijver, 2004). Adaptations involved replacing the original ethnic groups of the scale, Dutch and Moroccan-Dutch, with South African and its ethnic groups, respectively. All diversity scales follow a five-point Likert format ranging from *strongly agree* (1) to *strongly disagree* (5) and item scores were reversed before the analyses so that higher scores reflect a higher standing on the target construct.

### Mainstream domain instruments

- **Perceived multicultural norms:** This six-item scale is an adaptation of Ait Ouarasse and Van de Vijver (2004). This instrument measures the participant's multiculturalism values and attitudes on a five-item measurement scale that defines the participant's experiences of the majority of his or her co-workers' attitudes, cultural diversity acceptance, racial integration and equality within the workplace. An example item is: 'I think most of my co-workers from other cultures are most welcoming people'.
- **Perceived multicultural practices:** This scale is an adaptation of the scale by Ait Ouarasse and Van de Vijver (2004) and contains six items that measure the behaviour of actual multiculturalism and the occurrence of multicultural practices among the majority of co-workers within an organisation. An example item is 'My co-workers generally show respect for other cultures in our organization'.
- **Perceived mainstream tolerance:** This scale is an eight-item measure adapted from Ait Ouarasse and Van de Vijver (2004) and evaluates the participants' perceptions of the majority of co-workers and their attitudes to ethnic difference within the workplace and their general acceptance of cultural diversity and minority ethnic group activity. A sample items is 'I think that most of my co-workers accept the fact that we have different cultures'.

### Mediating variables

- **Ethnic vitality:** Ethnic vitality is a six-item scale adapted from Ait Ouarasse and Van de Vijver (2004) that measures organisational institutions' source of support and educational resources for acculturation processes taking place. A sample item is 'The cafe caters (makes provision) for my cultural food in our organisation'.
- **Integration norms at work:** This six-item scale (Jackson et al., 2012) measures the individual's own ethnic group's preference and expectation for integration of their members within the organisation as part of diversity. It expresses wishes from co-ethnics to interact and make contact with members form other ethnic groups. Items are phrased as positive statements; a sample item is

'Most members of my cultural group want me to show my cultural values and to respect those of others'.
- **Integration orientation:** This three-item scale measures the intended responses from employees regarding their attitudes towards integration, which involves adaptation and adoption of the dominant culture while not relinquishing their own. Sample items include 'I prefer social contact and interaction with members of ALL South African groups irrespective of ethnicity as well as with members of my own ethnic group'.

### Psychological and sociocultural diversity outcomes

- **Psychological outcome – The Minnesota Satisfaction Questionnaire (MSQ):** A short form developed by Weiss, Dawis, England and Lofquist (1967) was used in the present study. The MSQ is a 20-item scale that was used to assess the participants' intrinsic and extrinsic satisfaction with their jobs. Sample items include 'The way my job provides for steady employment' and 'The chances for advancement on the job'.
- **Psychological outcome – Organisational commitment:** This eight-item scale was developed for the study to measure an individual's affective commitment to his or her current workplace. Sample items include 'I am committed to this organization' and 'I am proud of this organization'.
- **Sociocultural diversity outcome – Work success:** This 14-item scale was developed by Ait Quarasse and Van de Vijver (2004). The scale measures sociocultural outcomes and includes punctuality, status, and recognition at work and task completion. Sample items include 'I always meet deadlines in my work' and 'I do my work well enough to be respected by my co-workers'.

## Data analysis

We applied multi-group path analysis (using AMOS version 24) to test for mediation effects of integration in the link between diversity conditions and employee outcomes. The mediation model was based on the reasoning that more distal variables (antecedent) conditions influence more proximal variables (diversity orientation), which, in turn, influence employee attitudes. We conducted a closer examination of the direct and indirect effects to evaluate their relative sizes, using the bootstrap procedure as implemented in the AMOS programme. Moreover, we computed a multivariate analysis of variance (MANOVA) to examine racial group differences in their experiences of workplace diversity and employee attitudes. Cohen's *d* values were used to gauge the size of the ethnic differences.

# Results

The results of this study are presented in three parts. We firstly examined the psychometric properties of the scales by conducting exploratory factor analyses (EFAs) and confirmatory factor analyses (CFAs) to examine the dimensionality and invariance of the scales and items in the

black, mixed race, and white groups using AMOS and SPSS software. We also computed internal consistencies. Secondly, we tested if our hypothesised multicultural model in the workplace would fit our data for the three groups of employees using multi-group analyses. Thirdly, we test group differences between black and white employees in the experiences of antecedents and intervening variables and employee attitudes.

## Psychometric properties

The results obtained from EFAs indicated that all scales used were unifactorial; proportions of explained variance by the first factor obtained in this study were as follows: 43.25%, 47.78% and 43.52% of the variance in *perceived multicultural norms* for white, black and mixed race employees, respectively; 43.21%, 44.57% and 43.275% in *perceived mainstream tolerance* for white, black and mixed race employees, respectively; 56.40%, 46.25% and 54.38% in *perceived multicultural practices* for white, black and mixed race employees, respectively; 56.73%, 64.10% and 53.92% in *an individual integration orientation* for white, black and mixed race employees, respectively; 31.92%, 35.03% and 44.16% in *perceived ethnic vitality at work* for white, black and mixed race employees, respectively; 60.71%, 54.73% and 61.28% in *perceived ethnic integration demands at work* for white, black and mixed race employees, respectively; 39.30%, 31.53% and 36.96% in *job satisfaction* for white, black and mixed race employees, respectively; 62.44%, 62.44% and 48.45% in *organisation commitment* for white, black and mixed race employees, respectively; and 43.99%, 36.89% and 39.86% in *subjective experiences of work success* for white, black and mixed race employees, respectively. Next, Cronbach's alpha coefficients and the relationships between the different variables focused on in this study were examined. An inspection of Table 2 shows that all the alpha coefficients obtained for the constructs measured, except for multicultural norms (white and mixed race people), ethnic vitality at work (white and black people) and individual integration orientation (white people) were lower than the guideline of 0.70 (Nunnally & Bernstein, 1994).

We then conducted invariance analyses to test scalar invariance. We conducted such analyses for each scale separately. The common approach to test for invariance is to employ CFA. However, for some of our longer measures, we did not have a sufficient sample size made to use CFA. We therefore opted for an EFA approach followed by differential item functioning analysis using regressions.

Over the past decade, applied researchers have argued that from a practical perspective, the $\chi^2$-difference test represents an excessively stringent test of invariance and particularly in the light of the fact that Structural Equation Modelling models at best are only approximations of reality (MacCallum, Roznowski & Necowitz, 1992). Consistent with this perspective, Cheung and Rensvold (2002) reasoned that it may be more reasonable to base invariance decisions on a difference in CFI ($\Delta$CFI) rather than on $\chi^2$ values. Based on a rigorous Monte Carlo study of several goodness-of-fit indices, Cheung and Rensvold (2002) proposed that evidence of non-invariance be based on a difference in CFI values larger than 0.01. The model that is taken to be invariant is then the most restrictive model for which the change in CFI value (compared to the previous, less restrictive model) is less than 0.01. We also examined changes in Tucker–Lewis index (TLI) and root mean square error of approximation (RMSEA) (the same critical values of 0.01 have been proposed), as well as values of Akaike information criterion Akaike information criterion (AIC) (the best fitting model is the model with the lowest AIC value). We tested configural, metric and scalar invariance (the latter addresses item bias or differential item functioning), followed by tests of the invariance of path coefficients (structural weights), error components of the latent variables (structural residuals) and error components of the observed variables (measurement residuals).

## A test of the multiculturalism model

In order to investigate the mediating role of ethnic integration in the relations between multiculturalism and positive employee attitudes at work, structural equation modelling was performed using AMOS 24; correlations of the components of the model are presented in Table 2. In this model (see Figure 1), a latent diversity climate variable, labelled multicultural climate that is measured by three positive multiculturalism conditions, namely multicultural norms, multicultural practices and mainstream tolerance, was found to impact on a single latent variable (positive employee attitudes at work) that was measured using three indicators,

**TABLE 2:** Descriptive statistics and correlations between multiculturalism and integration characteristics and outcomes.

| Variables | α (1) | α (2) | α (3) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Multicultural norms | 0.67 | 0.77 | 0.67 | - | - | - | - | - | - | - | - |
| Multicultural practices | 0.76 | 0.75 | 0.79 | 0.44** | - | - | - | - | - | - | - |
| Tolerance | 0.83 | 0.76 | 0.82 | 0.54** | 0.63** | - | - | - | - | - | - |
| Ethnic vitality at work | 0.56 | 0.62 | 0.74 | 0.27** | 0.37** | 0.35** | - | - | - | - | - |
| Ethnic integration demands at work | 0.87 | 0.83 | 0.87 | 0.41** | 0.58** | 0.51** | 0.53** | - | - | - | - |
| Individual integration orientation | 0.61 | 0.72 | 0.57 | 0.16** | 0.27** | 0.18** | 0.13* | 0.32** | - | - | - |
| Job satisfaction | 0.91 | 0.88 | 0.91 | 0.17** | 0.16** | 0.15* | 0.14* | 0.19** | 0.21** | - | - |
| Organisation commitment | 0.85 | 0.85 | 0.72 | 0.14* | 0.29** | 0.14* | 0.19** | 0.30** | 0.11* | 0.24** | - |
| Subjective experiences of work success | 0.89 | 0.86 | 0.87 | 0.29** | 0.28** | 0.21** | 0.17** | 0.30** | 0.29** | 0.26** | 0.28** |

(1), white people; (2), black people; (3), mixed race people.

*, $p < 0.05$; **, $p < 0.01$.

α, Cronbach's alpha coefficients.

namely organisational commitment, job satisfaction (psychological outcomes) and work success (sociocultural outcomes) through a latent variable (ethnic integration) that was measured using three indicators, namely ethnic integration norms, ethnic vitality and an individual integration acculturation orientation. The conceptual model used in this study considers antecedent conditions, ethnic intervening variables and positive employee attitudes at work as outcomes of a multiculturalism model.

The similarities and differences between the white, black, and mixed race ethnic groups were explored by testing the fit of a hierarchy of models with increasing constraints on the number of invariant parameters (see Table 3). An inspection of Table 3 revealed that the structural residuals model (see Figure 1) was the most restrictive model with a good fit: $\chi^2$ (115, $N = 299$) = 156.99, $p < 0.01$; $\chi^2/df = 1.37$ (recommended $\leq 3.00$). Other indices confirmed the good fit of the model: The TLI was 0.94 (recommended $\geq 0.90$), comparative fit index (CFI) was 0.94 (recommended $\geq 0.90$), AIC was 250.99 (the lowest of all AIC values) and the RMSEA was 0.04 (recommended $\leq 0.06$). The results of the structural residuals model are presented in Figure 1. In this model, the regression coefficients of the



*, $p < 0.05$; **, $p < 0.01$.
a, parameter was fixed (as 1) in the input path diagram.
**FIGURE 1:** A model for multiculturalism at work.

antecedent multicultural conditions and factor loadings to predict employee attitudes at work, through ethnic integration, the latent variable, as a mediating variable, are invariant across black, mixed race and white groups. The path from multicultural climate to ethnic integration was positive and significant. Similarly, the path from ethnic integration to employee attitude at work was also positive and significant. This suggests that climate, ethnic integration and output are related in the expected way. Employees who experienced a more positive multicultural climate also reported increased ethnic integration and better employee attitudes at work; as can be derived from the large standardised path coefficients, the associations between multicultural climate and ethnic integration and between the latter and outcomes were strong. We can therefore conclude that a multicultural climate is important for ethnic integration and employee attitudes at work.

## Mediating effects of ethnic integration

The hypothesised model is a mediation model in which multicultural conditions that are markers of a multicultural climate in an organisation influence an ethnic integration, which can be associated with an inclusive, colour-blind orientation, which, in turn, affects employee attitudes at work. There was a full mediation in our model. Although we started with this more parsimonious model, there are no theoretical reasons to exclude partial mediation. We performed a closer examination of the direct and indirect effects to evaluate their relative sizes. We computed the significance of mediation effects by using the bootstrap procedure (90% bias-corrected Confidence Interval (CI) using 200 samples) as implemented in the AMOS programme. The results of the mediation analysis can be found in Table 4. Multicultural conditions therefore exert indirect and significant influence on psychological and sociocultural diversity outcomes (job satisfaction and organisational commitment as well as the subjective experience of work success). It can be concluded that ethnic integration fully mediates the path from multiculturalism conditions to psychological and sociocultural diversity outcomes and that multiculturalism conditions show significant indirect associations with our outcomes.
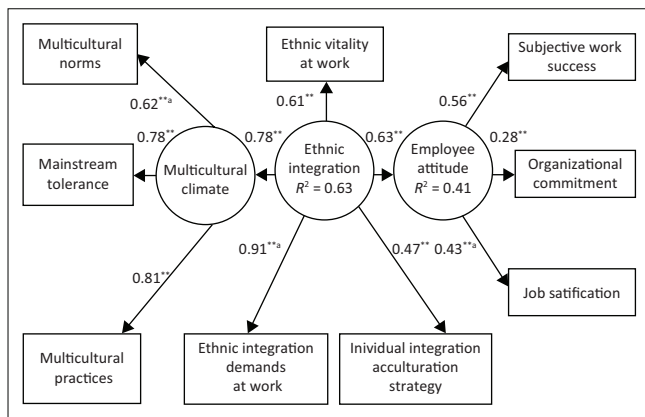
**TABLE 3:** Results of the multi-group structural equation model analysis.

| Model | $\chi^2/df$ | AIC | TLI | CFI | RMSEA | $\Delta\chi^2$ | $\Delta df$ |
|---|---|---|---|---|---|---|---|
| Unconstrained | 1.33* | 274.01 | 0.95 | 0.96 | 0.03 | - | - |
| Measurement weights | 1.36* | 268.55 | 0.94 | 0.95 | 0.04 | 18.54 | 12 |
| Measurement intercepts | 1.41* | 262.09 | 0.93 | 0.94 | 0.04 | 29.54 | 18 |
| Structural weights | 1.38* | 260.16 | 0.93 | 0.93 | 0.04 | 6.06 | 4 |
| Structural residuals | 1.33* | 250.99 | 0.94 | 0.94 | 0.04 | 2.82 | 6 |
| Measurement residuals | 1.61** | 268.12 | 0.91 | 0.90 | 0.05 | 53.13** | 18 |

AGFI, adjusted goodness-of-fit index; TLI, Tucker–Lewis index; CFI, comparative fit index; RMSEA, root mean square error of approximation; AIC, Akaike information criterion.
*, $p < 0.05$; **, $p < 0.01$.

**TABLE 4:** Mediation effects of integration (standardised effects).

| | Dependent variable | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Job satisfaction | | | Organisational commitment | | | Work success | | |
| Predictor | Direct | Indirect | Total | Direct | Indirect | Total | Direct | Indirect | Total |
| Multiculturalism | - | 0.21 | 0.21 | - | 0.26 | 0.26 | - | 0.27 | 0.27 |
| Ethnic integration | - | 0.26 | 0.26 | - | 0.33 | 0.33 | - | 0.33 | 0.34 |
| Employee attitudes | 0.43 | - | 0.43 | 0.53 | - | 0.53 | 0.56 | - | 0.56 |

Note: Empty cells (-) refer to effects that are zero in the model. All reported effects are significant, $p < 0.01$.

## Comparisons of ethnic groups

An MANOVA was then carried out with ethnicity (three levels: black, mixed race and white) as an independent variable and the mean scores of the scales as dependent variables. The multivariate effect of ethnicity bordered on significance (Wilks' $\Lambda = 0.917$, $F (18, 576) = 1.422$, $p = 0.11$). The mean scores of the scales per ethnic group are presented in Table 5. The only significant univariate effect was found for ethnic integration demands at work ($F [2, 296] = 3.643$, $p = 0.03$), ethnic vitality ($F [2, 296] = 2.685$, $p = 0.07$), an individual acculturation orientation ($F [2, 296] = 3.118$, $p = 0.05$) and subjective experiences of work success ($F [2, 296] = 2.842$, $p = 0.06$). White employees experienced higher on multicultural norms and practices as well as tolerance and ethnic vitality at work, and preferred an individual integration acculturation orientation and subjective experiences of work success and more at work compared to black and mixed race employees in this study. It also appears that mixed race employees experience more ethnic integration demands at work compared to white and mixed race employees.

The last column presents Cohen's $d$ values, which gauges the size of the ethnic differences. Only negligible and small effect sizes were observed. Although the impact of social desirability cannot be ruled out, our data suggest that multiculturalism is relatively well supported by both groups, and that the attitudes among employees are conducive for establishing and maintaining good intergroup relations in the workplace. All scale scores were high and well above the mid-point of the scale, which suggests that the multicultural climate, integration orientation and employee attitude were experienced by these employees as favourable and that they were satisfied with what they experience. White employees seemed to experience a slightly more favourable working environment, although the differences were very small and are only significant for ethnic vitality, individual integration acculturation orientation, ethnic integration and subjective experiences of work success.

## Discussion

A model of multiculturalism in South African workplace is proposed and tested. The model holds that diversity can be conceptualised as an interrelated set of a multicultural climate (as an antecedent), ethnic integration (as a mediator) and employee attitudes (as outcomes). The model was confirmed in groups of all black, mixed race and white employees. Models of multiculturalism have been reported in the literature (Jackson et al., 2012). These results concur with recent findings (Jackson et al., 2012), suggesting that (in this sample) a perceived multiculturalism climate was related to ethnic integration and positive attitudes at work. Employees who experienced more multiculturalism at work also reported higher ethnic integration and better employee attitudes at work. We can therefore conclude that the model of multiculturalism in the workplace is a valid conceptualisation of diversity in the workplace because it was demonstrated that multiculturalism and tolerance matter for ethnic vitality and ethnic integration as well as employee attitudes at work. Moreover, it was found that the link between a multicultural climate and outcomes is fully mediated by ethnic integration. The mediating effect of ethnic integration was also supported in a recent empirical study (Jackson et al., 2012) that tested a simplified version of the current model as well as a dual process model of diversity (Jackson et al., 2013b, Jackson & Van de Vijver, 2018). This simplified model (Jackson et al., 2012) does include all the current multicultural climate antecedents (multicultural norms or practices and tolerance) but did not include ethnic vitality as part of ethnic integration latent factor as mediator and include ill health (as opposed to job satisfaction and organisation commitment in the current contribution) as a psychological acculturation outcome. From a conceptual perspective, this model implies that the more distal variable of a multicultural climate influences employee attitudes through a set of more proximal integration attitudes and practices. From a theoretical perspective, it is therefore argued that the current model emphasises the inclusion of ethnic vitality as an additional element to the ethnic integration mediating latent factor.

Lastly, it was hypothesised that significant differences would be observed between black, mixed race and white ethnic groups in South Africa, employed in the South African workplace, in actual experiences of multiculturalism and

**TABLE 5:** Means and standard deviations per scale for the different ethnic groups.

| Variables | White groups (1)† | | Black groups (2)‡ | | Mixed race (3)§ | | Cohen's $d$ | | |
|---|---|---|---|---|---|---|---|---|---|
| | **M** | **SD** | **M** | **SD** | **M** | **SD** | **1/2** | **1/3** | **2/3** |
| **Multicultural antecedents** | | | | | | | | | |
| Multicultural norms | 3.32 | 0.63 | 3.25 | 0.79 | 3.31 | 0.67 | 0.09 | 0.02 | 0.08 |
| Multicultural practices | 3.74 | 0.68 | 3.65 | 0.62 | 3.70 | 0.73 | 0.13 | 0.06 | 0.09 |
| Tolerance | 3.47 | 0.57 | 3.32 | 0.62 | 3.40 | 0.66 | 0.24¶ | 0.11 | 0.12 |
| **Multicultural mediators** | | | | | | | | | |
| Ethnic vitality at work | 3.42 | 0.60 | 3.20 | 0.61 | 3.25 | 0.74 | 0.36¶ | 0.23¶ | 0.07 |
| Ethnic integration demands at work | 3.68 | 0.68 | 3.49 | 0.69 | 3.73 | 0.70 | 0.28¶ | 0.07 | −0.34¶ |
| Individual integration orientation | 3.96 | 0.62 | 3.68 | 0.84 | 3.78 | 0.74 | 0.33¶ | 0.24¶ | 0.12 |
| **Employee attitudes: Outcomes** | | | | | | | | | |
| Job satisfaction | 3.38 | 0.59 | 3.27 | 0.54 | 3.22 | 0.65 | 0.24¶ | 0.25¶ | 0.08 |
| Organisation commitment | 3.72 | 0.73 | 3.67 | 0.79 | 3.66 | 0.63 | 0.06 | 0.08 | 0.01 |
| Subjective experiences of work success | 3.99 | 0.54 | 3.80 | 0.53 | 3.87 | 0.55 | 0.35¶ | 0.23¶ | 0.13 |

†, $N = 77$; ‡, $N = 109$; §, $N = 113$.
¶, $d \geq 0.20$ (small effect).
M, means; SD, standard deviation.

mainstream tolerance, ethnic vitality, ethnic integration and positive employee attitudes. The findings suggest that white employees experienced higher on multicultural norms and practices as well as tolerance and ethnic vitality at work, and preferred an individual integration acculturation orientation and subjective experiences of work success and more at work compared to black and mixed race employees in this study. This finding could be because of the fact that white employees still occupy the dominant position in the economic sphere of the South African society, especially in the private sector as confirmed by the most recent Employment Equity Report issued by the South African Department of Labour (Department of Labour, 2017). Only negligible differences to small effect sizes were observed. Therefore, even though white employees tended to show somewhat higher scores on the antecedent, mediating and outcome variables, the group differences are small. All dimension scores are high and well above the mid-point of the scale, which suggests that the multicultural climate, ethnic integration orientations and employee attitudes that are experienced by these employees are favourable. Practically speaking, it means that the employees are satisfied with what they experience. The results concur with previous findings that suggest that white employees seem to experience a slightly more favourable multicultural environment (Jackson et al., 2012). In addition, the organisational literature suggests that minorities encounter less favourable racial conditions in firms than their white counterparts (Foley, Kidder, & Powell, 2002; Greenhaus, Parasuraman, & Wormley, 1990). Minorities also reported such concerns to be of greater relative importance (Kossek & Zonia, 1993; Mor Barak, Cherin, & Berkman, 1998). In turn, these negative racial conditions have been shown to undermine minorities' organisational attitudes (Chrobot-Mason, 2003; Foley et al., 2002).

There is some literature, originating from Western countries, about the question of whether diverse teams are more productive or less productive than monocultural teams (e.g. Bowers, Pharmer, & Salas, 2000; Van Knippenberg, De Dreu, & Homan, 2004; Webber & Donahue, 2001). This question is of theoretical interest; yet, its practical interest for multicultural countries like South Africa is limited as the cultural composition of work teams can usually not be manipulated and more and more teams are multicultural. In such countries, it has more practical relevance to study the factors that can enhance well-being and productivity of employees in such organisations. In addition, the *Employment Equity Act* (RSA, 1998) recommends that designated employer must collect information and conduct an analysis, as prescribed, of its employment policies, practices, procedures and the working environment, in order to identify employment barriers that adversely affect people from designated groups. The proposed model and instrument could useful for such workplace analysis or diversity audits. This study successfully demonstrated that both a multicultural climate (and conditions conducive for such a climate) and an inclusive orientation of employees have a substantial impact on employee attitudes. It may be noted that various aspects of this model (both in multicultural climate and in ethnic integration) can be influenced by diversity policies. This submission highlights the importance of treating all with respect and dignity in the workplace and provides a tool for HR, as the custodian of human right in the workplace, to 'frequently' assess especially intercultural interaction in the workplace.

## Limitations

The current study has some limitations. The cross-sectional nature of the data used does not allow for rigorous testing of causal links between the variables at hand; therefore, the dynamic nature of the relationships between multiculturalism, ethnic integration and employee attitudes cannot be uncovered with total accuracy. However, the findings constitute a useful basis for considering further research into factors that influence employees' attitudes. One also needs to consider that the use of a self-report method may be a limitation of the study. We cannot be certain that self-report measures provide an accurate picture of employees' actual responses to multiculturalism, ethnic integration and employee attitudes.

Future empirical work could consider the role of demographic variables such as age, gender, socio-economic status with regard to the support for multiculturalism, ethnic integration and its impact on employee attitudes in the workplace. Future studies should also consider using longitudinal designs and recruiting samples from various other state departments in the public sectors as well as various organisations from various sectors in the private sector and not for profit organisations, using mixed methods and according to Adkoli (2017, p. 38) multiple methods, tools and techniques, such as grounded theory (to develop a theoretical model based on actual ground realities), phenomenology (to understand a phenomenon from participants' perception), ethnography (to gain insights in the organisation culture), case studies (to develop in-depth understanding of a case) and narratives (to capture long personal experience). It is advised that researchers interact with the participant in a 'naturalistic setting' as opposed to an artificial 'lab setting' and helps in describing and exploring an issue to 'contextualisation' rather than 'generalisation'. A method of 'triangulation' should be used for validating the results. This will facilitate the use of the correct context-specific interventions.

## Recommendations

While diversity management is an approach that revolves around employees, the human resource management (HRM) function is the custodian of the people management processes. The HRM toolkits addressing inequality in recruitment, appraisal, advancement and reward can enhance equal employment opportunity, improve inclusiveness and enhance creativity in a diverse workforce. It is therefore widely recognised by researchers that effective diversity management can be achieved through using appropriate HRM strategies (Shen, Chanda, D'Netto, & Monga, (2009).

*At a theoretical level*, diversity research has been criticised for lacking scientific precision, theoretical analysis, historical specificity, empirical grounding and for being seriously under-researched (Litvin 1997; Nkomo & Cox 1996; Sanchez & Brock 1996). In this regard, Gedro and Mizzi (2014, p. 452) suggest critically exploring human resource development through a queer theory lens. Firstly, this perspective would mean that the structures of organisations must questioned in ways that are very real and very practical to all workers. This suggestion could manifest in human resources development (HRD) practices in the following ways: through the selection, which includes the opportunities for preparation, or 'grooming' such as stretch assignments and expatriate assignments (Gedro, 2010) for promotional opportunities; through the design of mentoring and career development programmes; through the design of workplace learning initiatives; through organisational change and development endeavours and through HR policies. Examining and then changing HRD practices to reduce or even eliminate inherent biases against minorities have the potential to shift an organisational culture from one of heteromasculine dominance to one that operates on principles of inclusion, respect and awareness of differences. Career development programmes that take into account the tapestry, the complexity and the fluidity of identity are one way of operationalising queer and feminist theoretical principles. To be more specific, career development programmes that resist stereotyping people based upon their gender or gender expression or their (perceived) sexual orientation or rather that expand the range of possibilities present a helpful type of resistance to fixed, stable and oppressive categories of identity.

*At a practical level*, it is recommended that organisations make use of cross-cultural training as intervention, which aims to develop the awareness, knowledge and skills needed to interact appropriately and effectively with culturally diverse customers and co-workers, which is an important element in the development of cultural competence (Bean, 2006). The Kraiger, Ford and Salas's (1993) framework of training evaluation identified three learning outcomes: affective-based, cognitive-based and skill-based outcomes. Kraiger et al. (1993) defined affective-based outcomes as measures of internal states that drive perception and behaviour. Affective-based outcomes include attitudes, self-efficacy and motivation in general; and cognitive-based outcomes include verbal knowledge, knowledge organisation and cognitive strategies. Skill-based outcomes include changes in behaviour (Kraiger et al., 1993). Kulik and Roberson (2008) have suggested that there are stronger effects for diversity training focused on dissemination (cognitive-based) and skills training than on awareness (affective-based). However, Kalinoski et al. (2013) observed in their meta-analysis of 65 studies for diversity training weaker effects on affective-based outcomes, compared with effects observed on cognitive-based and skill-based outcomes.

Forming teams with members from different cultures should be encouraged (contact hypothesis) and the inconsistent application policies should be discouraged as it could create impressions and perceptions of discrimination. The findings seem to suggest that multiculturalism works and it even economically pays off by creating a climate that creates a sense of subjective experience of work success. Lastly, it is suggested that organisations ensure that they have diversity management policies in place that can consistently be applied in situations where employees show disrespect for others' cultural practices or undermine multicultural practices in the workplace.

## Conclusion

The future success of South Africa's unique democracy depends on the development of harmonious race relations. Workplaces in South Africa represent microcosms of the society. The development of models and frameworks that could assist to analysis race relations at work should be encouraged. The use of such models that enhance harmonious race relations at work could go a long way in understanding race-related dynamics in the broader society. Understanding the factors underlying interracial attitudes is consequently important (Gordon, 2017). This model provides a basis for emphasising the importance of the role of multicultural norms, conventions and practices (culture) in shaping positive inter cultural orientations and employee attitudes at work.

# Acknowledgements

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# The impact of resilience and perceived organisational support on employee engagement in a competitive sales environment

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**Orientation:** Understanding the impact of resilience and perceived organisational support on employee engagement in a competitive sales environment.

**Research purpose:** The aim of this study was to explore the relationship between resilience, perceived organisational support and employee engagement among pharmaceutical sales employees in a competitive sales environment; and to establish whether resilience and perceived organisational support hold predictive value for employee engagement.

**Motivation for the study:** Limited research has focused on the unique context of employee engagement as a construct in professional sales. A broader understanding of resilience and perceived organisational support can provide sales organisations with a lever to create an environment where sales employees are more fully engaged.

**Research design, approach and method:** A quantitative, exploratory, cross-sectional survey approach was used. A sample of 125 sales representatives from a South African pharmaceutical organisation participated in the research. The measuring instruments included the Utrecht Work Engagement Scale (UWES), Brief Resilience Scale (BRS) and the Perceived Organisational Support Scale (POS).

**Main findings:** Perceived organisational support, but not resilience impacted employee engagement in a competitive sales environment.

**Practical and managerial implications:** Sales organisations' interventions to improve sales employee engagement should focus on perceived organisational support.

**Contribution:** The individual role of each construct provided insight into the sales context. The relationship between the constructs offered a different lens through which the drivers of employee engagement in sales can be viewed. This study contributes towards sales literature by including positive psychology and organisational support in a model of employee engagement.

## Introduction

### Key focus of the study

Understanding the impact of resilience and perceived organisational support (POS) on employee engagement in a competitive sales environment.

## Background

Sales employees are often the most important channel through which companies execute their strategies and generate revenue (Morelli & Braganza, 2012). Selling involves constant strain that includes competing with competitors, meeting sales targets and dealing with rejection (Loveland, Lounsbury, Parks, & Jackson, 2015). The topography of the current sales landscape is dynamic, evolving and uncertain. Sales tasks are often conducted in a competitive environment with sales positions often resulting in emotional exhaustion (Rajan & Srinivasan, 2015). Emotional exhaustion is often viewed as the opposite of engagement, or similar to being disengaged (Bande, Fernández-Ferrín, Varela, & Jaramillo, 2015).

Contemporary organisations need employees who feel energetic and engaged with their work (Albrecht, Bakker, Gruman, Macy, & Saks, 2015). The significance of employee engagement within an organisation relates to both the organisation and the employee. The benefits to

organisations include increased financial turnover (Rothmann & Rothmann, 2010), revenue growth (Werhane & Royal, 2009), gross profit (Towers Watson, 2015), operating profit (Towers Watson, 2012), greater customer satisfaction and increased productivity (Saks & Gruman, 2014). Benefits to the employee include self-reported indicators of greater health and well-being (Saks & Gruman, 2014), job satisfaction and lower staff turnover (Rothmann & Rothmann, 2010). Despite extensive research into employee engagement, relatively low levels of engagement continue to be reported by organisations across the globe (Albrecht et al., 2015). Investigating the drivers of engagement is therefore vital to understand how to enhance employee engagement in the work environment.

Employee engagement is a positive organisational outcome which has been associated with resilience (King, Newmans, & Luthans, 2015; Mache et al., 2014; Shin, Taylor, & Seo, 2012). The growing performance expectations of the current business environment cannot be met with average performance. Organisations thus require employees who are resilient and can succeed in chaos and grow in the face of difficulty, uncertainty and constant change (Kotzé & Nel, 2013). In sales, resilience enables the salesperson to sustain a constructive response in the face of adversity by focusing on the positive side of adversity, while simultaneously inhibiting negative responses (Krush, Agnihotri, Trainor, & Krishnakumar, 2013). People with a low level of resilience are more emotionally unstable when faced with difficulty (Bande et al., 2015; Bonanno, Papa, & O'Neill, 2001), less flexible to change and more resistant to new experiences (Bande et al., 2015).

Under the influence of a dynamic business environment, it is natural for employees to develop expectations regarding the extent to which the organisation cares about their well-being and appreciates their contribution in achieving business goals. A sense of being valued and appreciated is a key driver of positive organisational outcomes such as engagement. Feeling valued is not only highly organisation specific but also specific for different employee groups within an organisation (Gupta & Sharma, 2016). The aim of this research was to explore resilience of the individual and perceived support of the organisation as potential drivers of employee engagement in a competitive sales environment.

### Trends from the research

Although employee engagement has been identified as a significant driver of revenue and financial performance in modern organisations (Bakker & Demerouti, 2014; Verbeke, Dietz & Verwaal, 2011), limited research has focused on the unique context of employee engagement as a construct in professional sales (Medhurst & Albrecht, 2016). Existing sales literature on employee engagement focuses mainly on drivers such as role conflict, role ambiguity, adaptive selling behaviour (Miao & Evans, 2013), trust, psychological contract and interactional justice (Agarwal, 2014).

Various studies indicate that there is a relationship between resilience and engagement (Bakker, Albrecht, & Leiter, 2011; Bande et al., 2015; King et al., 2015; Mache et al., 2014; Shin et al., 2012). Resilience appears to be closely linked to vigour, one of the three dimensions of employee engagement (Schaufeli, Salanova, González-Romá, & Bakker 2002). Medhurst and Albrecht (2011) conclude similarly that resilience positively influences sales performance through vigour and also the investment of high levels of energy when faced with challenging situations. Bande et al. (2015) argue that resilience can lead to a subjective assessment of well-being that includes engagement. In the South African context, Simons and Buitendach (2013) observe a practical and statistically significant relationship between total employment engagement scores and resilience among call centre employees. The call centre environment is comparable to a competitive sales environment with respect to the negative effect of emotional exhaustion on employee well-being (Johnson et al., 2005). There appears to be no published studies in South Africa investigating the relationship between employee engagement and resilience in a sales environment.

Perceived organisational support as a construct is positively associated with employee engagement (Kurtessis et al., 2015; Mathumbu & Dodd, 2013). Research by Rothmann and Rothmann (2010) indicates that organisational support is a strong predictor of employee engagement in various South African industries. In the context of sales, this association is underpinned by the stressful nature of sales positions accompanied by emotional exhaustion, which ultimately has important implications for levels of engagement and the need for organisational support (Kurtessis et al., 2015). Salespeople with a subdued perception may also experience diminished job involvement and identification with the organisation, which can lead to less dedication and absorption (DeConinck, DeConinck, & Lockwood, 2015).

## Research objectives

The premise of this research is that employee engagement is a desirable organisational outcome in a competitive sales environment. Although there is limited empirical evidence concerning which factors predict employee engagement in a sales environment, this research aims to explore resilience and perceived organisational support (POS) as possible predictors.

The first objective of the study was to explore the relationship between resilience and employee engagement. Despite the importance of resilience in a sales environment, limited research has focused on resilience in salespeople (Loveland et al., 2015). Resilience appears to be closely linked to vigour, one of the three dimensions of employee engagement (Medhurst & Albrecht, 2011; Schaufeli et al., 2002). Engagement was defined as an aroused psychological state of energy and focus aimed at addressing the situational and task-related demands in a sales environment (Medhurst & Albrecht, 2016). According to the authors, salesperson engagement shares similar characteristics to the existing

conceptualisation of engagement in terms of vigour, dedication and absorption (Schaufeli et al., 2002).

The second objective of the study was to explore the relationship between POS and employee engagement. Although many studies have focused on POS as a construct, few studies have focused on POS in a sales environment (DeConinck et al., 2015). The stressful nature of sales positions accompanied by emotional exhaustion may have important implications for the incumbents' level of engagement and need for organisational support. Emotional exhaustion appears to be highly correlated with POS (Kurtessis et al., 2015). This correlation has important practical implications in a stressful work environment where employees are subjected to emotional exhaustion. This importance is accentuated in a sales environment where the sales force work alone in different geographical locations and are detached from the organisation (Morelli & Braganza, 2012).

## The potential value-add of the study

The purpose of this study was to contribute to the theoretical understanding of resilience and POS as potential drivers of employee engagement in a competitive sales environment. Resilience as a personal resource is pliable and open to development (Krush et al., 2013). An improved understanding of resilience can make a contribution to human resource management practices in terms of training and employee development. Studying resilience as a potential driver of employee engagement will make a contribution towards the academic field of positive psychology and positive organisational behaviour. Exploring salespeople's perceptions of organisational support offers valuable insights into the employee–organisation relationship in terms of concepts such as feeling valued as an employee (Gupta & Sharma, 2016), levels of supervisor support (DeConinck et al. 2015), fairness (Morelli & Braganza, 2012) and human resource management practices related to training, performance appraisal and compensation systems (Zampetakis, 2014). These insights can be utilised to create a more supportive environment with improved employee engagement and the ability to cope in a stressful profession (DeConinck et al. 2015). Studying the relationship between employee engagement and POS will make a contribution to the academic fields of positive organisational behaviour and organisational support theory.

In the next section, a synthesis and critical evaluation of the literature dealing with the constructs will be provided, followed by an explanation of the research design, reporting of results and a detailed discussion of the results.

## Ethical consideration

Ethical clearance was obtained from the University of Pretoria's Gordon Institute of Business Science Research Ethics Committee. All respondents were assured of confidentiality and anonymity, with participation being voluntary.

# Literature review
## Employee engagement

The emergence of engagement research in the 21st century is related to the developing importance of human capital, involvement of employees in organisations (Bailey, Madden, Alfes, & Fletcher, 2015; Schaufeli, 2013) and the need for businesses to maximise the inputs of employees (Rothmann & Rothmann, 2010). The first theoretical foundation of engagement stems from the work of Kahn (1990, p. 694), who views personal role engagement as the individual's emotional, cognitive and physical expression of their authentic self at work. To be fully engaged, individuals must display their full selves within their work role (Bailey et al., 2015). Building on the work of Kahn (1990, p. 694), Rich, Levine and Crawford (2010) state that individuals who are engaged invest their head, heart and hands in their performance. The second theoretical view of engagement is an activated positive state of mind directed towards work tasks. This view is founded on the concept of engagement and burnout being opposites of each other. This theoretical view defines engagement as 'a positive, fulfilling, work-related state of mind that is characterised by vigour, dedication and absorption towards work activities' (Schaufeli et al., 2002, p. 71). Vigour assists individuals to foster a more proactive work style (Coetzee, Schreuder, & Tladinyane, 2014) and is characterised by high levels of energy and mental resilience. In addition, vigour is associated with persistent, conscientious efforts to devote oneself to work and when facing difficulties (Coetzee et al., 2014). Dedication involves being strongly involved in one's work with a sense of pride and enthusiasm. Absorption involves being completely concentrated on and happily engrossed in one's work, whereby time passes quickly and it is difficult to detach from work (Bailey et al., 2015; Schaufeli, 2013).

Employee engagement has been identified as a significant driver of salesperson performance in modern sales organisations (Albrecht & Medhurst, 2011; Rapp, Bachrach, Panagopoulos, & Ogilvie, 2014). According to Albrecht et al. (2015), the direct influence of employee engagement on sales performance assists organisations to achieve a competitive advantage through improved customer satisfaction, increased selling intentions and a more favourable attitude towards products and resources. The impact of employee engagement in sales is also related to sales force turnover. Sales positions are subject to high turnover rates and are often challenging positions to fill (Bande et al., 2015). A high level of employee engagement is associated with 37% lower absenteeism (Harter, Schmidt, Agrawal, & Plowman, 2013) and has the ability to reduce the negative impact of sales force turnover on the business results of sales organisations (Bande et al., 2015).

A study by Medhurst and Albrecht (2016) interprets engagement among salespeople as an aroused psychological state of focus and energy, aimed at addressing the situational and task-related opportunities and demands encountered in

sales positions. According to these authors, salesperson engagement shares similar characteristics with the existing conceptualisation of engagement in terms of vigour, dedication and absorption (Schaufeli et al., 2002).

## Resilience

Bardoel, Pettit, De Cieri and McMillan (2014) propose that one of the theoretical approaches to resilience applied in the workplace is based on positive psychology and positive organisational behaviour. In positive psychology, resilience is described as a response where an individual adapts positively to exposure to a subjectively significant threat, risk or difficulty, without losing the ability to function normally (Bardoel et al., 2014; Bonanno, 2004). Recent applications of resilience in occupational literature focus on occupations associated with a high risk for experiencing acute stress and trauma, such as police officers and fire fighters (Freedman, 2004; Peres et al., 2011; Vanhove, Herian, Peres, Harms & Lester, 2015). However, Vanhove et al. (2015) propose that resilience may also be of significance in an employment context where stress can accumulate over time because of influences such as work overload, work relationships, lack of resources and support, emotional and physical exhaustion and work–life conflict. Johnson et al. (2005) identify teachers, ambulance workers, customer and social service workers, call centre staff and prison officers as examples of jobs where the above-mentioned influences and accumulated stress can have a negative effect on employee well-being and organisational functioning (Vanhove et al., 2015). Although no reference is made to sales employees, the nature of sales positions suggests that the sales environment can also be viewed as an employment context where resilience is of significance. Krush et al. (2013) support this view with the observation that resilience enables positive responses towards adversity, while simultaneously inhibiting negative responses.

Resilience in the workplace is also defined as the 'positive psychological capacity to "bounce back" from adversity, uncertainty, conflict, failure, or even positive change, progress and increased responsibility' (Kotzé & Nel, 2013; Luthans, 2002). According to the literature, a key component of resilience is whether an individual demonstrates simultaneous growth and positive change following a stressful event. Although some definitions refer to positive change, most simply require successful adaptation to adversity (Bande et al., 2015). In competitive sales, adaptation unaccompanied by growth or positive change will not enable a sales force to successfully meet sales targets or deal with rejection and competitors.

Employee engagement is a positive organisational outcome associated with resilience (King et al., 2015; Mache et al., 2014; Shin et al., 2012). Bande et al. (2015) report that resilience can lead to a subjective assessment of well-being that includes engagement. However, this prediction includes all the dimensions of self-efficacy, optimism, hope and resilience. This raises questions as to whether this position can be proposed by taking into account only the dimension of resilience. Luthans, Vogelgesang and Lester (2006) provide a possible explanation by arguing that resilient people may take a more pragmatic approach to dealing with stress than those with a high level of optimism or hope. Medhurst and Albrecht (2011) propose that resilience positively influences sales performance through vigour and the investment of high levels of energy when faced with challenging situations. Vigour as a dimension of employee engagement could therefore be positioned as a driver of employee engagement among sales employees (Schaufeli, 2013). This research study formulated the following hypothesis:

- **Hypothesis 1:** Can it be predicted with reasonable accuracy that a relationship exists between resilience and employee engagement in a sales environment?

## Perceived organisational support

Organisational support theory has attracted considerable attention because of its potential ability to explain the employee–employer relationship. Various studies indicate that POS is related to behavioural outcomes for both employees and organisations (Caesens, Marique, Hanin, & Stinglhamber, 2016). Beneficial organisational behavioural outcomes include organisational commitment (Baran, Shanock, & Miller, 2012; Connelly, Gallagher, & Gilley, 2007), organisational citizenship behaviour (Baran et al., 2012; Coyle-Shapiro & Morrow, 2006), performance (Webster & Adams, 2010) and job satisfaction (Kurtessis et al., 2015). Beneficial employee behavioural outcomes related to POS include increased trust in the organisation, job satisfaction, positive psychological well-being and increased in-role performance. Unfavourable behavioural outcomes include job stress, burnout and withdrawal behaviour. Under the umbrella of organisational support theory, fairness, human resource practices and supervisor support are important antecedents of POS (Baran et al., 2012; Kurtessis et al., 2015).

Perceived organisational support as a construct is positively associated with employee engagement (Kurtessis et al., 2015; Mathumbu & Dodd, 2013). According to organisational support theory, employees also develop beliefs regarding the extent to which the organisation cares about their well-being and appreciates their contribution to achieving business goals. Feeling appreciated is a key driver of positive organisational outcomes such as engagement (Gupta & Sharma, 2016).

The perception of organisational support can be viewed from an organisational or employee perspective. Tavares, van Knippenberg and van Dick (2015) argue that the perception of organisational support can be viewed by the organisation as a social currency offered with the aim of increasing the quality of the employer–employee relationship. This relationship is discretionary in nature, which means that employees can determine the extent to which they engage in extra-role efforts to benefit the organisation and its employees.

From the viewpoint of the employee, this relationship is reciprocal in nature as the employee feels obligated to support their employer with the expectation that increased performance will be noticed and rewarded. According to social exchange theory, employees with high POS will engage in greater job-related efforts (Kurtessis et al., 2015).

In a competitive and results-orientated milieu, sales representatives are more likely to succeed when they feel supported rather than directed (Adamson, Dixon, & Tolman, 2013). Sales representatives often work alone in different geographical locations and are detached from the organisation (Morelli & Braganza, 2012). Working outside the boundaries of the organisation in a complex sales environment may accentuate the need for organisational support. DeConinck et al. (2015) are of the opinion that with a subdued perception of organisational support, salespeople may also experience diminished job involvement and identification with the organisation, which can ultimately lead to less dedication and absorption. Dedication and absorption are critical dimensions of employee engagement based on the theoretical foundation of engagement as a positive, work-related state of mind (Schaufeli & Bakker, 2004). Based on the aforementioned, the following hypothesis is presented:

> **Hypothesis 2:** Can it be predicted with reasonable accuracy that a relationship exists between perceived organisational support and employee engagement in a sales environment?

Given these research findings, the researchers proposed a positive relationship between resilience and POS and employee engagement, respectively.

## Measurement of constructs

Most existing empirical research on employee engagement makes use of either the Utrecht Work Engagement Scale (UWES) (Gupta & Sharma, 2016; Schaufeli & Bakker, 2003) or the Job Engagement Scale (JES) (Gupta & Sharma, 2016; Rich & Levine, 2010). The JES is grounded in theories of self-expression at work and based on Kahn's (1990, p. 694) definition of engagement which includes physical, cognitive and affective dimensions (Gupta & Sharma, 2016). The UWES is grounded in burnout literature (Gupta & Sharma, 2016; Maslach & Leiter, 1997) and defines engagement as a positive, work-related state of mind with a strong sense of vigour towards, dedication to and absorption in work activities. According to Saks and Gruman (2014), the dimensions of the UWES are inconsistent with Kahn's (1990) original assertion that engagement is an indication of bringing one's true self to the performance of one's role (Saks & Gruman, 2014). The authors argue that bringing one's true self to the performance of one's role involves a much deeper and more authentic level of engagement than just devoting energy and dedication to the performance of work activities. However, a systematic review involving 214 studies found the UWES to be the most widely adopted measure of engagement (Schaufeli & Bakker, 2003).

The challenges of developing an operational definition for resilience have led to different approaches to measuring the construct (Windle et al., 2011). There is currently no gold standard in terms of measuring resilience. Most existing measures have concentrated on examining resources or protective factors that might facilitate a resilient outcome. In contrast, the Brief Resilience Scale (BRS) is designed to measure resilience as an outcome measure defined as the ability to recover from stress. The BRS is the only measure that assesses resilience based on its original and most basic meaning as relating to the ability to bounce back from stress (Smith, Tooley, Christopher, & Kay, 2010). In the South African context, the BRS was used in a small mixed method study by Edwards, Edwards and Highley (2015), with no references made to internal consistency scales using Cronbach's alpha. Additional measurement scales used in the local context include the Resilience Scale (Koen, van Eeden, & Wissing, 2011) and the Adult Resilience Indicator (Kotzé & Nel, 2013). A criticism from Jowkar, Friborg and Hjemdal (2010) is that most resilience measurement scales ignore the family and social aspects of resilience. An additional concern is that most of the resilience measurement instruments have been developed and utilised in the Western world, with concerns regarding their validity in non-western population (Abiola & Udofia, 2011; Dageid & Gronlie, 2015). Recent empirical research has demonstrated the BRS's reliability and validity in emerging countries such as Malaysia (Amat et al, 2014) and China (Lai & Yue, 2014).

The original 36-item POS Scale developed by Eisenberger (1986) has gained considerable interest because of the benefit of understanding the employee–employer relationship. The scale measures employees' perceptions regarding the extent to which employers value the contribution of employees and care about their well-being. Shorter versions of the scale are now available. Correlations among factor scores of POS Scale scores suggest that both the 8-item and 16-item version are just as effective as the original 36-item version, but are more efficient (Worley, Fuqua, & Hellman, 2009). A 6-item version of the POS Scale was used in a multi-industry, multi-generational and multicultural study with a high level of reliability (Smit, Stanz, & Bussin, 2015). In the South African context, the 8-item POS Scale has been used in a study of nurses and had acceptable levels of reliability and validity (Mathumbu & Dodd, 2013).

# Research design
## Research approach

Quantitative research methods were used to test the predetermined hypotheses regarding the relationship between the variables of resilience, organisational support and employee engagement within a cross-sectional time frame. Factor analysis, multiple regression and analysis of variance tests were applied to determine whether a predictive relationship of significance exists among the variables. Factor validity and reliability were determined for all measurement scales.

# Research method

## Research participants

The study made use of a convenience sampling approach. A survey was conducted on sales representatives from a Johannesburg Stock Exchange listed pharmaceutical company ($N = 220$) in South Africa. A response rate of 56.8% yielded a sample of 125 participants. The Monte Carlo simulation was used to determine the minimum sample size needed for multiple regression or prediction (Knofczynski & Mundfrom, 2007). From this method, it was inferred that for the purpose of this study, the minimum sample size needed for two predictor variables was 90 cases. The demographic characteristics of the sample indicate that almost 70% of the sales force were younger than or equal to 40 years of age, while 25% of the sales force had been employed by the organisation for 1 year or less. Female participants accounted for 69% of the sample, the majority of the respondents were white people (45%), followed by Indians (24%) and black people (17%), with the minority from the mixed race population (14%).

### Measuring instruments

The UWES, a 9-item questionnaire, measured employee engagement on a 7-point Likert scale ranging from 1 = never to 7 = always. Employee engagement was defined as a positive, fulfilling work-related state of mind that is characterised by the dimensions of vigour, dedication and absorption (Schaufeli, Bakker, & Salanova, 2006). An example of a question in this scale is: 'At my work, I feel bursting with energy'.

The 6-item BRS measured resilience as a single construct and the first independent variable (Smith et al., 2008). The BRS was chosen based on its ability to measure resilience in its most basic form (to bounce back from stress, difficulty or setbacks). The BRS was scored on a 5-point Likert scale varying from 1 = strongly disagree to 5 = strongly agree. An example of a question in this scale is 'It is hard for me to snap back when something bad happens'.

The 8-item version of the POS Scale (Eisenberger, 1986) was used to measure POS, and the extent to which employers value the contribution of employees and care about their well-being. The POS Scale was scored by finding the mean of the eight items on a 7-point Likert scale, varying from 1 = strongly disagree to 7 = strongly agree. An example of a question in this scale is 'The organisation strongly considers my goals and values'.

### Research procedure

A letter explaining the objective of the study and requesting participation in the survey was emailed to sales employees within the organisation. The measuring instruments were pretested with selected sales representatives from a division not participating in the study prior to being distributed to the entire sample, with no changes made after the testing phase.

Surveys were distributed to sales employees in paper-based form and via a link to an electronic format in Typeform™. Convenience sampling was used to select participants nationally from a sample frame consisting of 220 employees from which 125 responses were obtained for final analysis. The first section of the survey collected demographic information, whereas the second section consisted of a questionnaire combining the three measuring instruments.

## Statistical analysis

Coded data were analysed with the IBM SPSS (Version 22) statistical software tool. Descriptive statistics were calculated to describe the mean, median, standard deviation, skewness and kurtosis of the various constructs. Factor analysis was used to determine the construct validity of all measurement scales (Zikmund, Babin, Carr, & Griffin, 2010). First, the Kaiser–Meyer–Olkin (KMO) index and Bartlett's test of sphericity were inspected to determine whether factor analysis was a feasible option. Principle component analysis and a varimax rotation strategy were used to explore the factor structure of the various scales used within this study (Yong & Pearce, 2013). Cronbach's alpha was employed to determine reliability and internal consistency with a coefficient alpha between 0.70 and 0.80 considered to be reflective of good reliability (Zikmund et al., 2010). The corrected item-total correlation was used as an additional measure of reliability by correlating the individual item score to the sum of all scores. A correlation coefficient greater than 0.3 indicated adequate item-total correlation (Field, 2013).

Multiple regression determined whether resilience and POS hold predictive value for employee engagement. All required assumptions for multiple regression analyses were met before the analyses were conducted. The predictive power and relative contribution of the independent variables were tested with hierarchical multiple regression by entering the variables in a predetermined order. Demographic variables were controlled for and forced into the first step to determine whether the independent variables were still able to explain the remaining variance of the dependent variable.

# Results

## Validity and reliability of measurement scales

All the scales were subjected to a factor and reliability analysis. Single factor structures were obtained for all scales, whereas acceptable reliabilities were obtained for all subscales and overall scales. The KMO index measure for sampling adequacy for employee engagement, resilience and POS exceeded the minimum accepted level of 0.6 for a good factor analysis (Pallant, 2005).

For the UWES, high factor loadings were observed in all nine items, and therefore, all items were included in the scale. A one-factor solution also seemed to best fit the data. All correlation coefficients were greater than 0.30, indicating adequate item-total correlation. With an alpha of 0.93, the UWES Scale was considered to be reliable with a high degree

of consistency between multiple measurements of the scale. This level of reliability is within close range of a South African nurses study reporting an alpha coefficient of 0.79 (Mathumbu & Dodd, 2013) and a comparable South African study of call centre employees that reported an alpha of 0.95 (Simons & Buitendach, 2013).

For the BRS, the loadings of each of the items on the one component with factor loadings ranged from 0.43 to 0.81 exceeding the acceptable factor loading of 0.40. Therefore, all six scale items were included in the scale. All correlation coefficients were greater than 0.30, indicating adequate item-total correlation. The initial Cronbach's alpha for the BRS was 0.73. Item R5 ('I usually come through difficulty times with little trouble') lowered the scale's reliability and validity with a low correlation coefficient (< 0.30) and factor loading (0.434), and was subsequently removed from further analysis. There are no comparable South African studies reporting mean resilience scores based on the BRS.

For the POS Scale, high factor loadings were observed; therefore, all eight items were included in the scale. A one-factor solution also seemed to best fit the data. All correlation coefficients were greater than 0.30, indicating adequate item-total correlation. With a Cronbach's alpha of 0.90, the POS Scale was considered to be reliable with a high degree of consistency between multiple measurements of the scale. These results are consistent with previous South African research indicating an acceptable level of reliability and validity for this scale with Cronbach's alpha values ranging from 0.71 (Mathumbu & Dodd, 2013) to 0.89 (Smit et al., 2015).

## Descriptive statistics

The descriptive statistics for all constructs are presented in Table 1. For employee engagement, a mean score of 5.77 indicated a high level of employee engagement. On the 7-point Likert scale, this indicated a high level of engagement experienced often (a few times a week). A standard deviation dispersion of 0.87 showed that the individual responses did

not deviate much from the main score; the responses were therefore not polarised. Resilience had a mean score of 3.70 on a 5-point Likert scale presenting a high perceived level of resilience close to 'agree'. A standard deviation dispersion of 0.63 indicated that the individual responses deviated slightly from the main score. For POS, a mean score of 4.87 indicated a response close to 'slightly agree'. A standard deviation dispersion of 1.31 indicated that there was a large amount of variation in the individual responses.

In conclusion, descriptive statistics indicated a high perceived level of resilience and employee engagement, and a 'slightly agree' perception of POS.

## Multiple regression

In Table 2, demographic variables (gender, age, length of service) predicted approximately 4% of the variance in employee engagement. Resilience predicted just more than 5% of the variance in employee engagement. Neither the demographic variables ($F = 1.63$, $p > 0.05$) nor resilience ($F = 1.50$, $p > 0.05$) was statistically significant predictor of employee engagement. Perceived organisational support predicted approximately 23% of the variance in employee engagement ($F = 27.20$, $p < 0.05$). In Table 3, the regression coefficient of POS was statistically significant ($\beta = 0.44$, $p < 0.05$).

**TABLE 1:** Descriptive statistics of constructs.

| Variable | Mean | SD |
|---|---|---|
| Employee engagement | 5.77 | 0.87 |
| Resilience | 3.7 | 0.63 |
| Perceived organisational support | 4.87 | 1.31 |

SD, standard deviation.

**TABLE 2:** Model summary of employee engagement.

| Model | F Change | R | R² | Adjusted R Square | Cohen's f² |
|---|---|---|---|---|---|
| 1 | 1.632 | 0.197[a] | 0.039 | 0.015 | 0.04 |
| 2 | 1.502 | 0.225[b] | 0.051 | 0.019 | 0.05 |
| 3 | 27.200 | 0.477[c] | 0.227 | 0.195 | 0.29 |

[a], Predictors – (Constant), tenure, gender, age; [b], Predictors – (Constant), tenure, gender, age, TotalR; [c], Predictors – (Constant), tenure, gender, age, TotalR, TotalPOS.

**TABLE 3:** Coefficients of employee engagement[a].

| Model | Variable | β | | t | Sig. |
|---|---|---|---|---|---|
| | | Standardised coefficients | Unstandardised coefficients | | |
| 1 | (Constant) | 6.258 | - | 18.213 | 0.000 |
| | Gender | -0.315 | -0.169 | -1.865 | 0.065 |
| | Age | 0.076 | 0.093 | 0.781 | 0.437 |
| | Length of service | -0.019 | -0.177 | -1.467 | 0.145 |
| 2 | (Constant) | 5.696 | - | 9.953 | 0.000 |
| | Gender | -0.31 | -0.166 | -1.837 | 0.069 |
| | Age | 0.071 | 0.087 | 0.734 | 0.464 |
| | Length of service | -0.018 | -0.165 | -1.367 | 0.174 |
| | TotalR | 0.150 | 0.109 | 1.226 | 0.223 |
| 3 | (Constant) | 4.000 | - | 6.535 | 0.000 |
| | Gender | -0.129 | -0.069 | -0.821 | 0.413 |
| | Age | 0.084 | 0.102 | 0.951 | 0.344 |
| | Length of service | -0.007 | -0.064 | -0.577 | 0.565 |
| | TotalR | 0.114 | 0.083 | 1.031 | 0.305 |
| | TotalPOS | 0.293 | 0.442 | 5.215 | 0.000 |

Sig., significance.

Statistical power was increased with a large sample size ($N = 125$) than the required sample size of 90. The sample size was sufficient with a medium effect size ($\beta \geq 0.2$) and power of 80%. The increase in power decreased the probability of a Type II error (false negative). With a critical $\alpha \leq 0.05$, there was only a 5% chance of a Type I error, or incorrectly rejecting the null hypothesis.

In conclusion, there is a statistically significant relationship between POS and employee engagement, but no statistically significant relationship between resilience and employee engagement.

# Discussion

The main objective of the study was to determine whether resilience and POS are significant predictors of employee engagement. A discussion on the various constructs will be followed by the regression analysis.

### Hypothesis 1: Can it be predicted with reasonable accuracy that a relationship exists between resilience and employee engagement in a sales environment?

Although resilience explained almost 5% of the variance in employee engagement, no statistically significant relationship was found with employee engagement. The results of this analysis contradict prior academic research indicating that employee engagement is a positive organisational outcome associated with resilience (King et al., 2015; Mache et al., 2014; Shin et al., 2012). In the South African context, Simons and Buitendach (2013) observed a practical and statistically significant relationship between total employee engagement scores and resilience among call centre employees. The call centre environment is similar to the sales environment in terms of emotional exhaustion and burnout.

Findings from Bakker et al. (2011) also suggest that resilience is an important predictor of work engagement. However, this prediction included additional dimensions of self-efficacy, optimism, hope and resilience. It is likely that the predictive power of resilience for engagement could be stronger if it was defined and quantified in conjunction with all the dimensions of psychological capital.

It is plausible that the relationship between resilience and employee engagement is more complex than what can be explained by a simple prediction model. Resilience may be a moderating variable between an independent variable and the outcome variable employee engagement. For example, the possibility of the moderating effects of resilience as a personal resource in the relationship between job resources and work engagement has been recognised in existing empirical research (Mäkikangas, Feldt, Kinnunen, & Mauno, 2013; Xanthopoulou, Bakker, Demerouti & Schaufeli, 2007). It is also possible that resilience as a personal resource may act as a mediating variable between an independent variable and the outcome variable of employee engagement (Bakker & Demerouti, 2008; Chen, Westman, & Hobfoll, 2015). Using

the job-resources or demands model, Cooke, Cooper, Bartram, Wang and Mei (2016) found that employee resilience mediates the relationship between high-performance work systems and employee engagement within the context of Chinese banking.

In a sales context, resilience may act as a moderating variable between employee engagement and a different organisational outcome. Medhurst and Albrecht (2011) found that resilience influences a salesperson's performance through engagement and the investment of high levels of energy when faced with challenging situations. In addition, although resilience did not predict employee engagement for the population under study, this may be different in other populations.

### Hypothesis 2: Can it be predicted with reasonable accuracy that a relationship exists between perceived organisational support and employee engagement in a sales environment?

Perceived organisational support not only predicted approximately 23% of the variance in employee engagement ($F = 27.20$, $p < 0.05$) but also proved the regression coefficient to be statistically significant ($\beta = 0.44$, $p < 0.05$). This outcome is consistent with the results of earlier studies based on similar theory (Saks, 2006). According to social exchange theory, employees with high POS will engage in greater job-related efforts (Kurtessis et al., 2015). In more recent international and South African studies, positive organisational support was positively associated with a high level of engagement (Mathumbu & Dodd, 2013; Trinchero, Brunetto & Borgonovi, 2013).

It is also plausible that the relationship between the two constructs can be defined beyond prediction. Shantz, Alfes and Latham (2014) suggest that POS moderates the relationship between work engagement and behavioural outcomes such as turnover intentions and deviant behaviours. In a study of nurses, affective commitment mediated the relationship between POS and work engagement (Gupta, Agarwal, & Khatri, 2016).

While formulating the hypothesis, it was not assumed that employee engagement as an outcome would be entirely explained by the predictive power of the independent variable. Perceived organisational support predicted nearly a quarter (23%) of the outcome, which means that the majority, or almost three quarters of the predictive power of engagement, is still explained by different independent variables. It is also important to take into account that different predictors or drivers of employee engagement are interrelated and do not function separately. Examples of predictors of engagement reported in sales literature include role conflict, role ambiguity, activity and capability control, and adaptive selling behaviour (Miao & Evans, 2013), trust, psychological contract and interactional justice (Agarwal, 2014).

## Practical implications

Employee engagement is a continuous process in need of integration across all facets of the employer–employee relationship and employee life cycle (Albrecht et al., 2015). Direct supervisors and sales managers should treat employee engagement as a priority and actively take responsibility for driving the process. Although there are many stakeholders involved in creating a culture of engagement, line managers and direct supervisors ought to be the ultimate owners of engagement (Aon Hewitt, 2015).

Resilience is pliable and open to development (Krush et al., 2013) and resilience should thus be viewed as a set of skills that can be developed as part of strategic human resource management. Resilience-building programmes have proven to be effective in the workplace with a positive effect on health, well-being and performance (Robertson, Cooper, Sarkar, Curran, & Cooper, 2015; Vanhove et al., 2015). This can be of particular importance in the stressful nature of a competitive sales environment.

With supervisor support being identified as an antecedent of POS (Morelli & Braganza, 2012), sales managers should maintain a reflective outlook on the quality and level of their supervision and support towards sales staff. A high level of supervisor support has the ability to reduce burnout and ultimately staff turnover (DeConinck et al. 2015). With fairness being one of the precursors of POS (Morelli & Braganza, 2012), managers responsible for the allocation of sales territories, structuring of sales targets and performance packages play an important role in making decisions that are perceived by sales staff as fair. Human resource practices is the third antecedent of POS (Morelli & Braganza, 2012). A study by Zampetakis (2014) indicated that human resource management practices such as training, performance appraisal and compensation systems play an important role in creating supportive environments for sales employees. Individually or collectively, the above-mentioned factors may assist in creating an engaged sales force.

## Limitations and recommendations

The limitations of this study are mainly linked to shortcomings related to impact and generalisation. Firstly, the sample in this study was derived from a single pharmaceutical organisation with sales roles predominantly focused on doctor detailing and business-to-business selling. The results may consequently not be generalisable to sales employees working in different industries. Secondly, with pharmaceutical sales representatives working in a knowledge-intensive and science-based economy, the results may not be generalisable to sales employees working in other environments (e.g. telesales or retail sales). Thirdly, a cross-sectional research design provided only a snapshot of the specific time frame used. A different time frame containing dynamics such as restructuring or organisational change may have produced different results.

To validate and generalise the results of this study, future research should replicate the predictive relationship between POS and employee engagement in different sales organisations across different industries. Employee engagement has not been studied extensively in the South African pharmaceutical context. More research focusing on this sales environment can provide valuable insight on the constructs in question on an industry level. This research did not focus on sales performance as an outcome of employee engagement. An interesting area of research could be to explore how POS mediates the relationship between employee engagement and sales performance. The competitive nature of the pharmaceutical sales environment is bound to intensify with an increased focus on industry profit margins, and gaining and protecting market share. Demand for pharmaceuticals in South Africa is likely to rise in the future, reflecting demographic and epidemiological trends as well as government commitments to improved healthcare. Yet, the South African pharmaceutical industry will become more constrained (IMS Health, 2014) with squeezed industry margins due to increased drug pricing, intensified regulation of drug prices and the impact of inflation and exchange rate fluctuations on manufacturers. As a result, management will increasingly scrutinise sales performance as a driver of revenue.

Research measuring resilience as a single construct in a different context using the BRS would make a valuable contribution towards demonstrating the reliability and validity of the scale in the South African context as an emerging country. The positive association between employee engagement efforts and staff retention is well documented (Bande et al. 2015). Taking into consideration concerns related to high sales force turnover (Johnson, Friend, & Rutherford, 2016), future research can explore the moderating effect of POS and employee engagement on intention of sales staff to leave the organisation.

## Conclusion

Employee engagement remains a burning issue across corporate, consulting and academic domains. In the dynamic and competitive topography of sales, employee engagement has immense opportunities to impact business success. Resilience has the potential to reframe the challenging nature of sales positions into a more progressive and desirable occupational domain, while POS can be used by organisations as a social currency to increase employee engagement and ultimately sales performance. The results of this study provided insights that will encourage conversations and future research in a domain that is critical for organisational survival and success.

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## Competing interests

The authors declare that they have no financial or personal relationships which may have inappropriately influenced them in writing this article.

## Authors' contributions

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# Retention of high-potential employees in a development finance company

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**Orientation:** The loss of high-potential employees was a concern to leaders at a South African development finance company. The research question that guided the study was: How can high-potential employees be retained in the company?

**Research purpose:** The objective of the study was to identify factors that positively impact the retention of high-potential employees in a development finance company.

**Motivation for the study:** The organisation that comprised the unit of study had prioritised employee development to retain high-potential employees, thereby aiming to build a strong talent pipeline and a sustainable knowledge base. A prevalent concern was that there were no formal retention programmes for high-potential employees. Accordingly, organisational leaders could benefit from understanding those retention factors that may serve to retain such employees.

**Research design, approach and method:** A qualitative methodology promoted a deeper understanding of a social problem through a case study. Eleven purposefully chosen high-potential employees provided insights into factors they considered to be important in their retention. A content analysis of the data resulted in clusters of themes that addressed the research objective.

**Main findings:** The following factors appeared to influence the retention of high-potential employees: leadership and organisational culture, organisational purpose, developmental opportunities, meaningful work and collegiality.

**Practical and managerial implications:** Leaders in the company should consider factors that could influence the retention of high-potential employees. Such factors should be built into formal retention strategies based on the intrinsic needs of employees; the strengths that the organisational culture provides could be leveraged in this regard.

**Contribution:** The practical value of the study was the highlighting of the factors that can be leveraged to retain high-potential employees in a development finance company.

## Introduction

The inability to retain high-potential employees poses a concern to many organisations (Castellano, 2013), which are at risk of losing business knowledge when an employee leaves (Ortlieb & Sieben, 2012). In this process, leadership strength is damaged (Hausknecht, Rodda & Howard, 2009) and the organisation has to incur unnecessary costs by constantly replacing staff with those of the same calibre (Fritz, O'Neil, Popp, Williams & Arnett, 2012). Retention is 'the ability to hold onto those employees you want to keep, for longer than your competitors' (Johnson, 2000, p. 34).

The present case study focused on understanding retention factors for high-potential employees at a niche South African development finance institution with a complex business model, different from that of traditional asset-backed financiers. Such an institution is one that provides access to financial and support services to an underserved market with the aim of contributing to the sustainable growth of the economy (Association of Development Financing Institutions in Asia and the Pacific, 2013). A development finance institution is 'an alternative financial institution which includes microfinance institutions, a community development financial institution and revolving loan funds' (Levere, Schweke & Woo, 2006, p. 2). These loans carry a higher risk in comparison to those offered by traditional lending institutions in developing countries.

The environment in which the company operates is competitive, tightly regulated and high risk. Because of its entrepreneurial nature, organisational structure and the industry in which it

operates, retention of high-potential employees has become a crucial objective in the last 3 years and this objective has been translated into a key focus area for the human capital team. The company defines a high-potential employee as someone who is aligned to the organisation, who fulfils a critical role or has scarce skills, who fits into the organisational culture, who has a positive outlook and who is resilient.

## Purpose

Ingham (2006) suggests that retention of good employees is important for organisational success. There is scope for further research to understand the complexities of retention strategies and how they may influence retention of high-potential employees at a South African development finance company, with some cautious extrapolation, perhaps, to the broader industry. In light of this motivation, the research problem that the present study sought to address was to understand factors that may aid the retention of high-potential employees within the company. The research question, thus, was: what factors retain high-potential employees within a development finance company?

## Literature review

### The importance of retaining high-potential employees

Employee retention has become a global quest because employees contribute to organisational success (Ortlieb & Sieben, 2012). For an organisation to remain competitive, it must employ the most talented people within the market (Castellano, 2013). This is particularly relevant to the financial sector (Mohlala, Goldman & Goosen, 2012). However, top-performing employees are sometimes overlooked as organisational assets. As a result, they may become dissatisfied with and disengaged from their current employers and begin to look for new opportunities where they feel more highly valued (Hughes & Rog, 2008). Trying to replace talent and train new employees to function as productively as their predecessors is a growing challenge for financial institutions (Vasishtha, 2009).

### Characteristics of high-potential employees

A talented individual is one who drives exceptional business performance through competence, commitment and contribution (Hayashi & Dolan, 2013). McKinsey and Company (2001) offer a similar description, explaining that a high-potential employee is someone who demonstrates consistent levels of high performance, is capable of lateral or upward movement and has reached the potential to move upward, more commonly into management or supervisory positions. To this list, Allen, Bryant and Vardaman (2010) add that the individual must possess robust business knowledge and contribute soundly to the business. High-potential employees are more likely to become the future leaders of an organisation (Hausknecht et al., 2009) and possess several core characteristics including, but not limited to, creativity, autonomy, resilience and learning potential (Kyndt, Dochy, Michielsen & Moeyaert, 2009). Joo and Mclean (2006) note that employees who are engaged and

committed should be considered strategic assets in an organisation as they possess 'the set of difficult-to-trade-and-imitate, scarce, appropriable and specialized resources and capabilities that bestow a firm's competitive advantage' (Amit & Schoemaker, 1993, p. 36).

### Factors that impact retention of high-potential employees

It is important that employers endeavour to retain high-potential employees and replace the low performers with new employees with diverse skills and strong ability (Holtbrugge, Friedman & Puck, 2010). Turnover can be considered positive if talented employees are retained while lower performers leave the organisation (Hausknecht et al., 2009).

The term 'talent management' relates to:

> the implementation of integrated strategies or systems designed to increase workplace productivity by developing improved processes for attracting, developing, retaining, and utilising people with the required skills and aptitude to meet current and future business needs. (Lockwood, 2006, p. 2)

Talent management implies that companies are purposeful in the methods used to engage with new employees who are considered to have high potential. These strategies include selection techniques, the provision of developmental opportunities, promotion and mobility in the organisation (Ingham, 2006). Talent management also includes the manner in which performance is driven (Schiemann, 2013).

Blanket retention policies are often unsuccessful and disadvantageous to an organisation if they appeal to employees at all levels and are not segmented (Vaiman, Scullion & Collings, 2012). It is crucial that organisational leaders or human resource practitioners understand which factors help to retain employees specific to their own organisations. Retention schemes that are successful in one organisation may not necessarily achieve retention at another (Sinha, 2012).

Some of the key factors that have been shown to impact the retention of high-potential employees include organisational culture and values, self-actualisation, leadership, communication, work–life balance and reward and recognition (Trevisan, Veloso, Da Silva, Dutra & Fischer, 2014).

The variation in employee retention across organisations may be related to organisational culture (Kerr & Slocum, 2005). Organisational culture is described by Schein (2006, p. 236) as a 'set of shared, implicit assumptions that a group holds and that determines how it perceives, thinks about, and reacts to its various environments'. Similarly, Chatman and Cha (2003) explain culture to be a system of shared values and norms. Employees become energised when the culture appeals to their higher ideals and values (Liden, Wayne, Lioa & Meuser, 2014).

Linked to organisational culture, organisational commitment is often enhanced by the relationship the employee has with

the organisation, especially if the employee is aligned to the organisation (Messmer, 2004). Leaders should ideally enhance employees' personal links to the company, thereby enabling employees to better understand how their individual successes contribute to the overall success of the organisation (Sun & Anderson, 2012). If employees are well socialised into the organisation and identify with the corporate culture, their commitment is likely to be enhanced (Kinicki & Fugate, 2012).

Personal values of individuals influence their beliefs, behaviour and the decisions they make in the workplace (Alfes, Shantz, Truss & Soane, 2013). If employees identify with the values of the organisation and believe them to be similar to their own, they are more likely to stay with the organisation (Grojean, Resick, Dickson & Smith, 2004).

High-potential senior employees often try to achieve a level of self-actualisation (Gupta & Tayal, 2013). They are on a constant journey to be the best possible versions of themselves (Ramlall, 2004). They need to feel that they are learning, advancing and remaining competitive in relation to their industry peers and see this as leading to opportunities for promotion and career advancement (Kyndt et al., 2009). If they do not feel this way, the likelihood of them exploring new external job opportunities increases (Sageer, Rafat & Agarwal, 2012).

Leadership is fundamental to the retention of high-potential employees and should be reflective of the organisational culture (Paul & Berry, 2013). Kaiser and Hogan (2010) argue that standing by business ethics and displaying personal integrity are prerequisites for good transformational leadership. If leaders are perceived to be lacking integrity, it is likely to harm the trust and the relationships required to build and sustain effective working relationships with high-potential employees (Kaiser & Hogan, 2010).

Leaders, through the organisational culture, provide employees with informal direction on how to execute their roles to achieve the strategic objectives (Grojean et al., 2004). They also encourage employees to take ownership of their actions and consequently, high performers are likely to excel (Chatman & Cha, 2003).

Effective communication is linked to leadership (Effelsberg, Solga & Gurt, 2012) and is considered one of the best tools for leaders to increase retention (Masibigiri & Nienaber, 2011). Open and honest communication can contribute to employee commitment and thereby promote retention and by reminding employees of their value and importance to an organisation, high commitment can be fostered (Tillott, Walsh & Moxham, 2013). Thus, an inclusive organisational culture that promotes open and honest communication, and one that places a strong emphasis on knowledge equality, is likely to contribute to the retention of employees (Pyszka & Pilat, 2011).

If employees feel that they are unable to attain a work–life balance, they may be more predisposed to leave for an environment that can support this expectation, necessitating that both employees and organisations reach an agreement on this issue (Greenhaus & Allen, 2012). Organisational leaders should focus on providing policies that promote a healthy work–life balance to assist in the retention of top potential employees (Nadeem, 2009).

The culture of the company determines the organisational mindset around opportunities offered internally (Chatman & Cha, 2003). High-potential employees appreciate organisational investment in training and skills development that generally lower an employee's need to leave (Allen, 2008). This is particularly relevant for professions where incumbents require constant skills updating or continuous professional development (Doh, Smith, Stumpf & Tymon, 2011). Growth opportunities and long-term career prospects are crucial for high-potential employees (Rondeau & Wager, 2001).

Extrinsic and intrinsic rewards and advancement opportunities are central to the retention of high-potential employees (Caldwell et al., 2012). Employees need to feel equitably remunerated and see potential to grow within organisations (Mansel, Brough & Cole, 2006). Ryan (2010) discusses the results of a top talent survey in which partners of various organisations were asked what they considered to be the top tools to retain high-potential employees. All partners stated that compensation would retain talent. However, the results revealed that compensation ranked number four by high-potential employees while developmental opportunities ranked number one.

If employees perceive that contributions are equal to the benefits they receive, they are less likely to leave the organisation (Lee, Liu, Rousseau, Hui & Chen, 2011). These benefits may be in the form of remuneration, the feel of the workplace environment and opportunities for promotion and development. If the culture of the organisation allows for flexibility regarding working conditions and benefits, whether tangible or intangible, this can aid retention strategies (Chatman & Cha, 2003).

# Method

## Research approach

The study adopted a qualitative approach to assist in an understanding the experiences of the participants, all of whom had been identified as high-potential employees in the company; it sought to promote the understanding of a social problem through rich description (Creswell, 2014).

## Research design

A case study design in a single organisation was used to explore the way in which participants construct meaning within their own live contexts (Yin, 2009). In this way, an attempt was made to learn more about an unknown or inadequately understood subject by means of gathering in-depth data (Leedy & Ormrod, 2001).

## Population and sample

The population comprised 15 senior high-potential employees from whom 11 participants were selected through purposive sampling. All participants had to display the characteristics of a high-potential employee as determined by the company: alignment to the organisation, performing a critical role or having scarce skills, fitting into the organisational culture, possessing a positive outlook and resilience. They were employees with diverse skills and business knowledge who could be rotated within the company and added value to numerous business areas. Because of their skills transferability and scarce skills, these employees are marketable and thus are 'key informants' (Maxwell, 2013, p. 73) or respected or knowledgeable people in terms of the research subject and ones who are able to provide a deeper understanding of the issues under consideration.

## Research instrument

Based on the literature, an interview guide was constructed that included open-ended questions. Care was taken to ensure that the questions were fully understood by the participants. The questions were organised and worded in a way to encourage participants to provide accurate, unbiased and complete information in relation to the research problem. Probes were used if participants appeared unsure of the questions. Examples of questions included 'Please describe your level of commitment to the company', 'Please explain the degree to which accurate information is shared throughout the organisation', 'What opportunities are there for you to participate in decision-making regarding organisational goals and objectives?' and 'If you could describe the corporate culture of the company in three words, what would they be?'

## Data collection

Access to participants was gained by obtaining consent from the organisation and participants were approached individually through personal emails to set up convenient meeting times and at venues that ensured confidentiality.

## Data analysis and interpretation

In line with qualitative research methodology, the data were subjected to content analysis where themes, or recurring 'threads of meaning' (Baxter, 1991, p. 250) and categories, or groups of content-sharing commonalities (Krippendorff, 1980) were used to assemble the first-order concepts and to understand the information at a higher logical level (Graneheim & Lundman, 2004). To ensure reliability of the data, all semi-structured questions were posed in the same way to participants by the first author, and responses were not influenced in any way (Myers, 2010).

The soundness of a study is influenced by credibility, internal validity and transferability (Bowen, 2005). Credibility is determined by establishing whether the information provided by participants speaks to the findings of the study (Esterberg, 2002), which was the case in the present study. Golafshani (2003, p. 600) indicates that credibility in qualitative studies refers to the 'ability and effort' of the researcher. Selecting the most appropriate method of data collection, as well as the amount of data collected, was important in establishing such credibility. The units of data acquired through content analysis were not too broad with multiple meanings and not too narrow as to risk fragmentation. In addition, representative quotations from the transcribed text were used to illustrate the input provided by participants (Graneheim & Lundman, 2004).

Transferability is the ability to use the same research method and approach in another setting and obtain a similar result (Pidgeon & Henwood, 1997). Transferability was ensured through providing rich descriptions of data (Bowen, 2005), thus allowing other researchers to use the current study as a framework for reflection on the findings (Terre Blanche & Durrheim, 1999).

## Ethical considerations

The necessary authorisation was obtained from the company at which the study was conducted. The company's name remained anonymous and no identifying details of participants were disclosed. Written consent was obtained from all participants and the information gathered was kept confidential in accordance with the guidelines of Leedy and Ormrod (2001). Participants were informed of the nature of the study, that participation was voluntary and that they could withdraw from the study at any time should they not feel comfortable.

# Findings

The purpose of the study was to understand, from 11 high-potential employees, what factors could be used to retain such employees within the company. The following themes emerged.

## Leadership

Five participants attributed poor leadership as the reason why they had left previous organisations. Participants mentioned that supportive leadership was an overarching reason why they stayed with their current employer:

> For me leadership is the differentiating factor for staying in an organisation. That's why I decided to stay here. The CEO is phenomenal. Since he joined in 2010, I've been more engaged and excited to be at work. (Participant 5, Indian male, 9 years' service)

Participant 10 cited the open management style in the business as being the reason for his retention:

> No manager is unapproachable in the organisation. My manager is inclusive and entrenched in the business. He includes our team in everything and values our opinion. I appreciate that the CEO is someone who wants everyone to be happy and lives the culture he is trying to create in the organisation. (Participant 10, white male, 5 years' service)

Participant 8 echoed this sentiment:

> I have a great manager. I report to a manager who goes beyond his call of duty to build relationships and support his employees both personally and professionally. I'm privileged to work so closely with the executive team. One of the executives is an inspiration to women. She holds her own in a male dominated environment while running the department. She's approachable, independent and objective. She acts with high integrity. I really respect her. (Participant 8, black female, 5 years' service)

## Organisational purpose

The majority of participants had a clear understanding of the company's mission and organisational purpose. They emphasised that the business is focused on being a true development financier:

> What other organisation allows you to uplift previously disadvantaged people who did not have access to finance and provide them with an opportunity to create their own business? We are giving people access to the formal and mainstream economy. (Participant 11, white male, 3 years' service)

> The organisation does what I feel is really important. [*It*] creates value by empowering people to create value for themselves. (Participant 3, black male, 2 years' service)

> I truly believe in what we do in this business. Being part of a development finance organisation that directly impacts millions of South Africans every day is why I come to work. The purpose and concept of what we do is really cool. (Participant 1, black female, 2 years' service)

## Developmental opportunities

All participants expressed their appreciation for being invited to attend courses. All mentioned that they valued the organisation for providing a diverse range of developmental opportunities geared to every level of the organisation:

> The current leadership initiatives being run internally have impacted me positively. I've learnt a lot and gained valuable work experience. It's a fantastic opportunity. The organisation has arranged a formal coaching programme for me that has influenced me hugely, both personally and professionally. The fact that the organisation is willing to spend money on developing me increases my commitment. (Participant 6, white male, 4 years' service)

Participant 6 appreciated the recognition and developmental opportunities he receives within the company. He described the internal and external opportunities as well thought out, thus ensuring that they were adding value to every employee.

Participant 3 added:

> I really value the opportunity to learn and not being intellectually bored. (Participant 3, black male, 2 years' service)

## Meaningful work

Five participants felt that their jobs added value to both themselves and the company, and they were able to see how their roles contributed towards the company's success. Because of the dynamic nature of the business and the complexity of their jobs, they found their work challenging and intellectually stimulating, which participants highlighted as being important for them. Participants 1 and 7 emphasised that meaningful work was a major retention factor for them at this stage of their careers:

> If I'm not challenged, I'll leave. I must enjoy what I'm doing and be able to see the value of my work. (Participant 1, black female, 2 years' service)

> The work is always challenging. This is a driving factor for me. I need to be challenged. The way we do things is constantly evolving. There's always something to improve on or to implement and that excites me. I stay because I can add value and people ask for my opinion. It's magic. (Participant 7, white male, 4 years' service)

## Environment

The physical and cultural environment created by the company was a prominent theme in almost every interview. Seven participants used words such as 'dynamic', 'fun' and 'energetic' when describing the company's environment. Many of the participants referred to the positive environment specifically of the customer-consulting area and the vehicle warehouse business unit, which they felt truly differentiated this company from any other company. The culture was described as being reflective of the values and purpose of the company. The participants felt the environment fostered collaboration and innovation among employees, departments and customers:

> In my previous organisation I struggled. Going to work took more effort and my energy was depleted at the end of every day. I woke up in the morning thinking, do I really have to go to work? Whereas now, on a Monday morning, I wake up and think, awesome, I'm going to work. (Participant 6, white male, 4 years' service)

Participant 5 described the environment as fast paced and energetic. Participant 3 shared a similar view:

> The environment is cool and very unique to this business. If you walk into the welcome centre, customer service consultants are friendly and have created a happy and welcoming space. The area is a representation of how client focused the business is. But, if I had to show someone our business I would take them to the vehicle workshop purely because of its grandeur and pace. It's really amazing. (Participant 3, black male, 2 years' service)

## Collegiality

The participants all valued and respected the people who work for the company. They enjoyed coming to work because of the people with whom they interacted. They respected the teams in the business and those who they called their organisational heroes. Most of the heroes mentioned were not executives but teams and people in specific roles. Where possible, team names or job titles were used to show that, regardless of level, participants felt they were surrounded by great people in the organisation:

> They're able to do a job that's really unpleasant but have such a good ethic and sense of community. (Participant 6, white male, 4 years' service)

> The people are the reason I decided to join this company. I had such a great experience and interactions during my interview that I wanted to work here. I wanted to work with the people. People are so passionate, it's infectious. (Participant 3, black male, 2 years' service)

> I'm privileged to be a part of the team. (Participant 7, white male, 4 years' service)

Participant 11 referred to the resilient nature of the people within the company:

> The environment can be tough but the people are passionate, smart and strong. I enjoy interacting with the people at work. Our passion towards the business unites us and all of us can really relate to each other. (Participant 11, white male, 3 years' service)

# Discussion

## Outline of the findings

The study aimed to identify factors that could positively impact the retention of high-potential employees in a development finance company. The question which was answered was: What factors positively impact the retention of high-potential employees in a development finance company? Five major themes emerged in this regard: leadership and organisational culture, organisational purpose, developmental opportunities, meaningful work and collegiality. The factors are listed in order of importance as ranked by participants.

## Leadership and organisational culture

Participants valued the good leadership they experience in the company. This was the leading retention factor expressed. Leaders who are accessible and inclusive inspire and motivate high-potential employees within organisations (Trevisan et al., 2014). Many of the participants cited leadership as the reason why they chose to leave previous organisations and why they remain with their current employer. Participants appeared to respect their current leaders and, in particular, the CEO who was described as a people's person who lives the culture he has created. This finding supports the view that leaders reflect culture (Paul & Berry, 2013). Participants trusted leadership as a result of the good business ethics and personal integrity they observed (Kaiser & Hogan, 2010). Such identification appeared to influence retention positively. Participants stressed the importance of having leaders who motivate them, allow them the freedom to make decisions and enable them to work independently, but who are available and approachable if assistance is required. Such a leadership approach allows employees to take ownership of their actions, with the result that they remain engaged and committed to the company (Chatman & Cha, 2003).

The physical and cultural environment created by the company was a prominent theme in almost every interview. Participants agreed that the organisational culture encourages an environment that promotes innovation and collaboration (Grojean et al., 2004). The physical environment was seen as a differentiating factor and one that fosters collaboration and innovation among employees, departments and customers. From the findings one can see that high-potential employees prefer to work in environments that are productive, respect employees, value diversity and are inclusive and sociable (Ramlall, 2004).

## Organisational purpose

Participants made reference to the importance of belonging to an organisation that has a motivational purpose to which they are able to relate. Participants mentioned that, as they live and work in a developing country, it is important for them, at this stage of their careers as senior managers or specialists, to see the value in what they do. They want to belong to an organisation that is committed to improving the country and one that focuses on sustainability. Many of the participants enjoyed the direct impact that the organisation has on communities and the economy and, for them, this was a powerful motivator, increasing their desire to stay at the company. The findings confirmed that if high-potential employees identify with the organisation's purpose and recognise their role in fulfilling that purpose, they are likely to remain with the organisation (Messmer, 2004).

## Developmental opportunities

The need to develop was evident among these high-potential participants. All expressed appreciation for the developmental opportunities provided, which they considered to be abundant in assisting them to grow, achieve and advance in their careers. Similarly, Ryan (2010) found that it is important for high-potential employees to work for a company that provides them with such opportunities. Although developmental opportunities did not appear to be the leading retention factor for the participants, it emerged within the top three factors.

Many of the participants felt that the organisation offered a variety of developmental opportunities that were tailored and customised to their differing needs. They appreciated that the organisation supported continuous learning and development. Allen (2008) and Mohlala et al. (2012) also found that high-potential employees appreciate organisational investment in training and skills development with Allen (2008) noting that providing training and developmental opportunities generally increases retention of high-potential employees.

## Meaningful work

A common theme that emerged was the meaningfulness of the work which the company provides. Participants felt that their jobs add value and that they are able to see the value of their roles in the company's success. Their jobs allow them to be integrally involved in the business and they are able to make strategic business decisions. Participants alluded to the fact that if they were no longer challenged or if they could not see the value of their work, they would leave the company (Gupta & Tayal, 2013).

Participants expressed a similar view to that of Ramlall (2004), stating that at this stage of their careers they were on a constant journey to become better versions of themselves in the work place. They needed to add value and fulfil their personal passion. Their roles are meaningful to them personally and this motivates them. Participants explained that the meaningfulness of their work drives their commitment to the organisation and because of their involvement in the business they do not wish to seek other employment.

### Collegiality

Participants explained how they value and respect the people who work for the organisation. They enjoy coming to work because of the people with whom they work and interact. They respect the teams in the business and those who they referred to as their organisational heroes. High-potential employees need to work in an organisation where they feel respected and, more importantly, where they respect the people they work with (Ramlall, 2004).

Relationships appeared to be a factor that influences the retention of high-potential employees. Participants enjoyed being surrounded by people who are hardworking and passionate. Employees enjoy working with people who are like-minded and share the same behavioural norms (Kinicki & Fugate, 2012). Participants were complimentary about both teams and individuals employed within the company. There was a clear level of respect and appreciation for different people, teams and qualities within the business, reflective of the culture created to which high-potential employees relate. This finding is aligned to the prior research of Paul and Berry (2013) and Ramlall (2004).

### Practical implications

The findings have implications for the advancement of knowledge in the field of managing and retaining high-potential employees in the organisation.

The organisation should develop retention strategies based on the needs of its top potential employees as well as leverage the strengths that the organisational culture of the company provides. The findings of the study indicate that high-potential employees are intrinsically motivated. Therefore, the outcomes of this study could assist line and human resource managers in developing retention strategies that will not only increase the commitment of high-potential employees but also assist the organisation in retaining them as well.

It is important for the leaders in the company to be aware, further, that the needs of high-potential employees may vary (Chatman & Cha, 2003). Accordingly, efforts should be made to tailor retention strategies targeted at high-potential employees to ensure that their individual needs are met.

Leaders should focus on developing the organisational culture so that it is strong and promotes the organisational

purpose, encourages continuous development of employees, continues to create a cohesive environment and thus fosters and attracts the right people.

### Limitations and recommendations

While this study provided insights into the factors that motivate high-potential employees within the development finance industry, the information obtained was based on the participants' subjective views. This, coupled with the fact that the study was conducted in one organisation only, means that the findings must be generalised with caution. Nevertheless, the study provides pointers that can be considered and further explored with a view to retaining high-potential employees in this industry.

Understanding the factors that retain high-potential employees is a complex task (Chatman & Cha, 2003). Future research could seek to understand the balance that is required between intrinsic and extrinsic rewards in order to retain high-potential employees.

The participants in this study were all senior high-potential employees. Future research could consider retention strategies for high-potential employees at different levels in the company with a view to retaining and developing such employees into senior levels. Research may also indicate differences in retention strategies for different demographic groups including the retention requirements of high-potential employees at different stages in their careers.

### Conclusion

There is increasing focus on retaining high-potential employees (Castellano, 2013) because of the organisational costs associated with losing such employees (Hausknecht et al., 2009; Ortlieb & Sieben, 2012). Organisational leaders and human resource practitioners are also concerned about the costs and the time it takes to replace high performers (Fritz et al., 2012). Retaining high-potential employees is cost effective and can impact organisational success (Ortlieb & Sieben, 2012). Accordingly, factors such as leadership, organisational culture, organisational purpose, developmental opportunities, meaningful work and collegiality should be explored as potential factors that promote retention of high-potential employees.

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### Competing interests

## Authors' contributions

The study was based on the research dissertation of the first author, L.L., completed at the University of Johannesburg for the degree MPhil in Leadership in Performance and Change. A.T. was the supervisor of the study. A.T. converted the dissertation into the present manuscript.

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# Role stress and turnover intentions among information technology personnel in South Africa: The role of supervisor support

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**Orientation:** High turnover of information technology (IT) personnel is a major problem facing many global and local organisations. An increasingly important area of turnover research of IT personnel experiencing role stress involves examining their perceptions of supervisor support.

**Research purpose:** This study aimed to examine the effects of role-related stress and supervisor support on job satisfaction, job performance and IT turnover intentions.

**Motivations for the study:** It is important to assess from both a theoretical and a practical perspective the extent to which turnover can be explained by relational factors such as supervisor support.

**Research design, approach and method:** An online voluntary survey yielded a sample of 163 respondents. Six constructs were measured: turnover intention, job performance, job satisfaction, supervisor support, role ambiguity and role conflict. A total of 158 usable responses were subjected to descriptive, correlation and regression analysis. Mediation and moderation effects were assessed using a multiple regression bootstrapping procedure.

**Main findings:** Role ambiguity has a greater impact on job satisfaction than role conflict. Job satisfaction fully mediated the relationship between role stress and turnover intention. Supervisor support mediated the relationship between role stressors and job satisfaction and role stressors and job performance. There was no evidence in favour of a moderating role of supervisor support.

**Practical and managerial implications:** Higher priority should be given to tackling role ambiguity. Supervisor support can increase job satisfaction, improve job performance and ultimately reduce turnover intentions, despite the presence of role stress.

**Contribution or value-add:** Human resource managers and IT managers could use these results to improve job performance and staff retention.

## Introduction

Studies globally characterise information technology (IT) personnel as being part of the 'turnover culture' (Moore & Burke, 2002). These norms of high turnover of IT personnel are also a persistent challenge facing many South African organisations (Igbaria, Meredith & Smith, 1995; Smith & Speight, 2006; Naidoo, 2016). Factors such as role ambiguity, role conflict, role overload, exhaustion, stress and burnout offer useful explanations for turnover decisions in IT (Johnson & Stinson, 1975). A number of studies report that role-related demands, insufficient time to keep abreast with changing technologies, lack of resources and lack of support are among the primary sources of stress facing IT personnel (Ghapanchi & Aurum, 2011). In fact, role ambiguity and role conflict are the most often cited drivers of IT turnover (Lee, 1999). The increasingly complex and demanding nature of IT work is not surprising given the rapid technological changes and concomitantly greater expectations of end users, managers and government policymakers that IT employees keep up with these changes in technology (Lim & Teo, 1999).

In its National Integrated Information and Communication Technology (ICT) Policy White Paper (Telecommunications & Postal Services, 2016), the South African government recognises the importance of developing and retaining IT skills. Government policymakers recognise that the IT skills supply–demand gap is a major barrier to realising their social objectives. The IT skills gap also potentially impedes private sector companies from competing effectively in local

and global markets. Against this context of insufficient staff and resources, it is important to understand the different types of stressors experienced by IT personnel who are forced to work longer hours and serve in varied organisational roles (Ahuja, Chudoba, Kacmar, Mcknight & George, 2007). Role-related stress is of growing concern because it has significant economic implications for the national ICT sector. Role-related stress can lead to strain on emotional and physical health of IT personnel, work exhaustion, depersonalisation, job dissatisfaction, career switching and consequently a decline in productivity in the national ICT sector (Armstrong, Brooks & Riemenschneider, 2015). More specifically, the withdrawal behaviours of stressed IT personnel are also costly to organisations in terms of tardiness, rework, workdays lost, lateness, increased absenteeism, retirement and health costs (Jamal, 1984). Stressed IT personnel are more likely to show withdrawal behaviours such as cynicism, lack of organisational commitment, intention to leave and turnover (Moore, 2000). Moreover, those who leave add to hiring and training costs as well as investment in training and social capital losses. Meanwhile, although skilled IT workers can easily find new jobs, they also incur costs in adjusting to a new job.

While moderate levels of role-related stress can stimulate creativity and productivity (Qasim, Javed & Shafi, 2014), excessive levels of stress in the IT work environment may hinder industry competitiveness (Cho & Huang, 2012). However, the literature claims that strong supervisor support can relieve employee stress by improving the IT work environment (De Clercq, Dimov & Belausteguigoitia, 2016). For example, supervisors can address employee complaints and provide them with the required resources to complete their tasks (Firth, Mellor, Moore & Loquet, 2004). According to the buffering model of social support, employees that have good relationships with their supervisors can be productive even when they experience severe job stress (Cummins, 1990; De Clercq et al., 2016). Given the scarcity of IT talent, the critical importance of IT personnel well-being and arguably high levels of role stressors they experience, the general aim of the study is to investigate the effect of role-related stressors on turnover intentions. Furthermore, the IT literature has not addressed the role of job satisfaction as a mediator of job stressors on turnover intentions adequately. In addition, although supervisor support is important in reducing role stress, few IT studies have investigated this mediating relationship.

# Research purpose

The main purpose of this study was to examine how well job role stressors influence job satisfaction in IT. It also examined the relationship between supervisor's support, job satisfaction, job performance and turnover intentions. Specifically, it addressed these four research questions:

- Which role stressor, role ambiguity or role conflict has the biggest negative influence on job satisfaction?
- To what extent is the role stressor–turnover intentions relationship mediated by job satisfaction?

- Does supervisor support moderate and/or mediate the relationship between role stressors and job satisfaction?
- Does supervisor support mediate the relationship between role stressors and job performance?

# Literature review
## Turnover and turnover intentions

In the last 50 years, more than 1500 articles have been published on voluntary turnover (Holtom, Mitchell, Lee & Eberly, 2008). Since 1980, close to 100 studies focused on the voluntary turnover of IT personnel alone, further reinforcing the importance of this problem in the IT sector (Ghapanchi & Aurum, 2011; Joseph, Ng, Koh & Ang, 2007). Voluntary turnover occurs when the decision to leave the organisation is at the employee's discretion. This is different from involuntary turnover (layoffs, forced resignations, firing) where the organisation enforces the decision. According to human capital theory, while some voluntary turnover can be functional, it generally has a negative influence on workforce performance. Firstly, voluntary turnover depletes the organisation-specific human capital accumulated by an employee. Secondly, turnover eliminates the organisation's return on its investment from a productive employee. Thirdly, high turnover can disrupt the organisation's operations, for example, managers need to redirect human resources away from maintenance and safety to product or service delivery activities. For practical reasons, most studies focus on voluntary turnover intention as opposed to voluntary turnover. Voluntary turnover intention is the estimated probability that the employee will leave the organisation (Nzukuma & Bussin, 2011). Not surprisingly, voluntary turnover intention is also the best predictor of voluntary turnover and is a popular dependent variable for actual voluntary turnover. Although theoretical expansion of voluntary (avoidable or sometimes referred to as dysfunctional) turnover has been fruitful over the years, there continues to be a focus on stress, working relationship issues and job dissatisfaction.

## Job satisfaction

Given the practical benefits for enhancing employee lives and improving the effectiveness of organisations, job satisfaction has been studied extensively in the HR literature. A popular theory of job satisfaction is the value-percept model (Judge & Klinger, 2007). The value-percept model expresses job satisfaction in terms of what employees value and the job outcomes (Locke, 1969). This model predicts that discrepancies between employee desires and what is received are dissatisfying only if the job facet is important. While job satisfaction has several definitions, Locke (1976) defines job satisfaction as 'a pleasurable or positive emotional state resulting from the appraisal of one's job or job experiences' (Locke, 1976:1304). While this definition emphasises a cognitive (evaluative) and affective (or emotional) perspective, other conceptualisations include a behavioural component. A review by Judge and Klinger (2007) found that job satisfaction is related to a number of workplace behaviours. These include attendance, turnover decisions, decisions to retire,

psychological withdrawal behaviours, prosocial and organisational citizenship behaviours, workplace deviance behaviour and job performance. Job satisfaction also shows a strong relationship with employee well-being (Goswami, 2014; Judge & Klinger, 2007). However, while the literature recommends that organisations should value job satisfaction and employee well-being, it does not follow that these insights are generally applied by organisations.

## Role stressors and job performance

Employees generally accept job roles because they provide important psychological benefits such as status, ego gratification and self-esteem (Chang, Jiang, Klein & Chen, 2012; Cho & Huang, 2012; Jiang & Klein, 2001). Task identity, task significance, skill variety, autonomy and feedback are intrinsically motivating job characteristics (McKnight, Phillips & Hardgrave, 2009; Payne, Fineman & Wall, 1976) that produce positive outcomes such as job satisfaction and job performance. However, roles can also be costly when employees are not able to perform them as expected. According to role stress theory (Katz & Kahn, 1978), employee role expectations experienced as prolonged pressure can create symptoms of ill health owing to strain and fatigue (Driscoll, Beehr, Journal & Mar, 2016; Jamal, 1984). Employees experience role stressors in the form of increasing demands and constraints. Role stressors are composed of three distinct but related constructs: role overload, role ambiguity and role conflict. Role overload occurs when a person cannot fulfil the work within the time available. In this case, role expectations are greater than the employee's abilities and motivation to perform a task (Goswami, 2014; Holtom et al., 2008). Role ambiguity occurs when a person has inadequate information to accomplish his or her role in a satisfactory manner. In this case, the employee does not have clear authority or knowledge about how to perform the assigned job (Raman, Vijayakumar Bharathi, Sesha & Joseph, 2013). Role conflict occurs when complying with one role makes it difficult or impossible to comply with another role. This suggests incompatible expectations and demands (Rutner et al., 2008). It is plausible that role stressors are being experienced by local IT personnel. This concept could illuminate more about IT turnover in the South African context. It is also important to investigate the relationship between role stressors and job performance.

## Supervisor support

An increasingly important area of human resource management research involves examining employee perceptions of support at work (Cummins, 1990; Erturk, 2014; Karasek, Triantis & Chaudhry, 1982). Prior research argues that employees value support from their co-supervisor more than from their co-workers or organisation (Kottke & Sharafinski, 1988). Supervisor support is the degree to which employees perceive that supervisors care about their well-being (De Clercq et al., 2016). The perception of care and the provision of positive social interaction and resources support role demands. Turnover research has begun to consider relational variables such as supervisor support (Holtom et al., 2008; King & Bu, 2005).
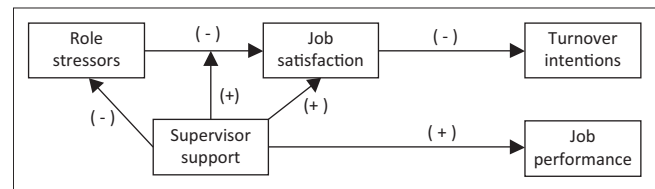


Source: Adapted from Joseph, D., Ng, K., Koh, C., & Ang, S. (2007). Turnover of information technology professionals: A narrative review, meta-analytic structural equation modeling, and model development. *MIS Quarterly, 31*(3), 547–577. https://doi.org/10.2307/25148807

**FIGURE 1:** Hypothesised model of the relationships between role stressors, supervisor support, job satisfaction, job performance and turnover intention in information technology.

Perceived supervisor support and the quality of the leader–member exchange relationship have been found to predict employee turnover (Erturk, 2014; Wayne, Shore & Liden, 1997). In these studies, perceived supervisor support was negatively related to turnover. Furthermore, employees who perceive greater social support have greater emotional and psychological resources for coping with role stressors (Hoonakker, Carayon & Korunka, 2013). Therefore, this study expects that the supervisor's support of IT personnel will mitigate the relationship between the role stressors that IT personnel experience and their levels of job satisfaction.

## The research model and hypotheses

Figure 1 depicts a conceptual model of role stressors, supervisor support, job satisfaction and turnover intention in IT drawn from the HR, organisational and psychology literature.

## Hypotheses

Role stressors are one of the ongoing challenges facing IT personnel (Ghapanchi & Aurum, 2011). A number of IT researchers make a strong case that role stressors result in emotional exhaustion, job dissatisfaction and turnover intention (Dhar & Dhar, 2010; Lim & Teo, 1999; Moore, 2000). Tedium factors, such as emotional exhaustion and fatigue, are also linked to role stressors and some studies have examined similar effects of technology advancements and threats of professional obsolescence (Kim, 2005). Studies have found that role ambiguity, role conflict and role overload reduce job satisfaction and hence increase IT employee turnover intention (Calisir, Gumussoy & Iskin, 2011). IT personnel tend to also serve multiple user communities as IT roles generally involve a high level of boundary spanning activities because of the nature of the job and the limited resources (Lim & Teo, 1999; Moore, 2000; Mourmant, Gallivan & Kalika, 2009; Levina & Vaast, 2014). Studies show that IT personnel involved in boundary spanning roles are more vulnerable to role stressors. For parsimony, the two role stressors (role ambiguity and role conflict) considered here are likely to influence job satisfaction differently (Calisir et al., 2011). To test if role stressors are a determining factor in relation to job satisfaction, the first hypothesis states:

- **Hypothesis 1 (H1):** There is a negative association between the employee's role stress as a result of role ambiguity and role conflict on their job satisfaction, but the effects (size) will be different.

A number of IT studies have shown that role stressors are related to lower job satisfaction (Calisir et al., 2011; Joseph et al., 2007). Substantial evidence from two recent systematic reviews found that job satisfaction is negatively related to turnover intentions (Ghapanchi & Aurum, 2011; Joseph et al., 2007). However, few studies have tested the possibility of a meditational nature of job satisfaction (Yousef, 2014). For example, Joseph et al. (2007) found that job satisfaction significantly mediated the effects of role ambiguity and role conflict on IT turnover intention. In this study, we test the possibility of IT employees' perceptions of role stressors and turnover intentions being mediated through job satisfaction (LeRouge, Nelson & Blanton, 2006). This leads to the second hypothesis:

- **Hypothesis 2 (H2):** The negative relationship between role stressors and turnover intention is mediated by job satisfaction.

Supervisor support is important in helping employees cope with stress (Jamal, 1984) and stressful situations (Karasek et al., 1982). As a result, stress does not have strong negative effects on their job satisfaction (Harris, Harris & Harvey, 2008). On the contrary, individuals who lack supervisory support are vulnerable to the effects of role stress (Visser & Rothmann, 2009). Empirical evidence regarding the effects of role stress is mixed (Holtom et al., 2008). Some studies have indicated that supervisor support interacts with role stressors in predicting job satisfaction, whereas other studies have not found evidence for such an interaction (Kirmeyer & Dougherty, 1988). Other studies found that individuals who receive high levels of supervisor support cope better with stress and are more satisfied with their jobs (Erturk, 2014; Ghapanchi & Aurum, 2011). While some studies suggest that supervisor support acts as a buffer that moderates the relationship between role stressors and job satisfaction, other studies have failed to replicate these results (Baloyi, Van Waveren & Chan, 2014). As indicated in Figure 1, supervisor support may also play a role by linking role stress to job satisfaction. In other words, supervisor support may intervene between role stress and job satisfaction by attenuating or preventing negative role stress outcomes such as a reduction in job satisfaction. Similarly, results are equally conflicting regarding the possibility of supervisor support mediating the relationship between role stressors and job satisfaction (Baloyi et al., 2014). This study strives to clarify these results by verifying the possibility of the quality of supervisor support probably moderating and/or mediating the association between role stressors (role conflict and ambiguity) and job satisfaction. More precisely, two hypotheses will be assessed:

- **Hypothesis 3 (H3):** Supervisor support will moderate the relationship between role stress and job satisfaction, such that the negative relationship between role stress and job satisfaction will be weakest when supervisor support is the highest.

- **Hypothesis 4 (H4):** The negative relationship between role stressors and job satisfaction is mediated by supervisor support.

A few studies have suggested that supervisor support has been associated with improvements in job performance in stressful professions (AbuAlRub, 2004). The relationship between supervisor support and job performance among IT professionals requires further investigation (Igbaria & Baroudi, 1995). Figure 1 proposes that supervisor support may intervene between role stress and job performance by attenuating or preventing negative effects on job performance (Baloyi et al., 2014). To test if supervisor support plays a determining factor in the role stressor–job performance relationship, the fifth and final hypothesis states:

- **Hypothesis 5 (H5):** The negative relationship between role stressors and job performance is mediated by supervisor support.

## Research design

A quantitative survey was employed to collect empirical data for hypothesis testing. Many turnover studies employed a similar approach (Ghapanchi & Aurum, 2011). Information technology personnel were targeted for this study. The target population of this study's sample was derived from the e-mailing lists of a few local IT professional bodies. Five academic researchers as well as two experienced human resource development (HRD) practitioners pre-tested the survey for face and content validity. Prior to the main survey, 20 postgraduate IT students volunteered to complete the pilot survey to ensure face validity of the online questionnaire. The objective of this pilot was to test if the participants understood the questions and that the full spectrum of the scale were used. Only minor changes to the questionnaire instructions and the design of the survey form were made as a result of the pre-test and pilot. The final questionnaire was divided into two main sections. Section A dealt with the demographic information of the respondents, for example, age, tenure, gender and highest educational qualification.

Section B measured the research model's six constructs. Construct measures were adapted from prior studies. Items for measuring job satisfaction were adapted from Pond and Geyer (1991). The construct's four indicators were:

- All things considered, how satisfied are you with your current job? 1 ('Very dissatisfied') to 5 ('Very satisfied').
- In general, how much do you enjoy your job? 1 ('Don't like it at all') to 5 ('Like it very much').
- Knowing what you now know, would you take up your current job again? 1 ('Definitely would not take this job') to 5 ('Would take this job without hesitation').
- How does this job compare with your ideal job? 1 ('Far from ideal') to 5 ('Close to ideal').

The remaining items were measured using a 5-point Likert scale which ranged from strongly disagree (1) to strongly agree (5).

The turnover intention construct's three indicators adapted from Allen and Meyer (1990) were:

- I often think about quitting my job.
- As soon as I find a better job, I will leave this organisation.
- I will probably look for a new job in the near future.

The job performance construct's three indicators adapted from Welbourne and Johnson (1997) were:

- I am achieving my personal career goals at my current organisation.
- I am developing skills needed for my future career.
- I am making progress in my career.

Items measuring supervisor support were adapted from Steelman, Levy and Snell (2004). The construct's four indicators were:

- My supervisor actively listens to my suggestions.
- My supervisor enables me to perform at my best.
- My supervisor promotes an atmosphere of teamwork.
- Overall, my supervisor does a good job.

Role stressors consisted of two constructs, namely, Role conflict and role ambiguity (Firth et al., 2004). Role conflict consisted of three indicators:

- I work with two or more groups who operate quite differently.
- I receive incompatible requests from two or more people.
- I do things that are sometimes accepted by some people and not by others.

The role ambiguity construct's three indicators were:

- Clear, planned goals and objectives exist for my job.
- I know what my responsibilities are.
- I know exactly what is expected of me.

The combined email lists had approximately 1000 unique email addresses. Subjects were prompted to complete the online questionnaire via a short email. The online survey was appropriate as IT professionals were the focus of the study.

Following a single round of data collection, 163 responses were collected, giving an estimated response rate of 16.3%. Five of these responses were incomplete and hence were discarded. The remaining responses were screened to identify any data entry errors as well as outliers. The final data for analysis consisted of 158 usable responses. These responses were sufficient given the number of variables and the correlation and multiple regression analysis techniques that were to be used to test the hypotheses (Hair, Anderson, Babin & Black, 2010). The data were analysed using the Statistical Package for Social Sciences (SPSS) version 24 and the PROCESS program. The PROCESS program developed by Hayes (2012) was installed to conduct the mediation and moderation analyses. Skewness of the constructs (ranging between -0.826 for supervisor support and 0.372 for role stressors) showed that the data were not highly skewed and

Kurtosis (ranging from -0.901 for turnover intentions to 0.611 for role stress) would not affect the results of the statistical analysis.

## Statistical analysis

Principal component analysis (PCA) with a direct oblimin rotation of the 20 scale items reflecting the variables of the study (role ambiguity, role conflict, supervisor support, job satisfaction, job performance and turnover intention) was conducted to identify their linear combinations (Hair et al., 2010). The Cronbach's alpha test was used to test the internal consistency of the scale items (Hair et al., 2010). As the job stressor variables measured the same concept, a composite variable was created using the average score of the summed variables. A minimum factor loading of 0.70 would be deemed to be acceptable (Nunnally, 1967). To test Hypotheses 1, standard multiple regression was used to determine how much of variance was explained by the two job stressor constructs. Hayes (2012) PROCESS procedures were used to assess hypothesis 2, 4 and 5 (mediational) and hypothesis 3 (moderation).

## Ethical considerations

Permission was granted by the University's Ethics Committee as the study complied with protocols relating to voluntary participation and anonymity of respondents.

# Results

Table 1 presents the profile of the respondents. The age of the respondents varied from 20 to 65 years with a mean age of 36 years (Table 1). Of these, 67.8% were male and 32.2% were female. Although the sample consisted of a greater spread of male compared to female respondents, this response is perhaps not atypical of the South African IT work context. Only 22.8% of the sample consisted of IT professionals younger than 30 years of age. Over 70% of the respondents had 8 or more years total work experience. Although respondents had diverse educational levels (high school to doctoral study), 94.2% of the respondents reported having at least some form of tertiary education.

Prior to performing PCA, the suitability of the data for factor analysis was assessed. Inspection of the correlation matrix revealed the presence of many coefficients of 0.3 and above. The Kaiser–Meyer–Oklin value was 0.852. This exceeds the recommended value of 0.60. The Bartlett's Test of Sphericity reached statistical significance ($p = 0.000$), supporting the factorability of the correlation matrix. All components were retained for Eigen value greater than 1. A stable 6-factor and 20-item solution emerged and the minimum values are shown in Table 2, which shows that results for the constructs revealed sufficiently high internal consistency for most of the scales, ranging from 0.605 to 0.924. The response pattern for role conflict was slightly inconsistent. Although this construct was below the cut-off value of 0.70, patterns like this sometimes occur with constructs involving few scale items. The construct was retained for further analysis.

**TABLE 1:** Profile of the respondents.

| Participants | Number (*N* = 158) | Percentage |
|---|---|---|
| **Age** | | |
| 20–25 | 6 | 3.8 |
| 26–30 | 43 | 27.2 |
| 31–40 | 67 | 42.4 |
| 41–50 | 30 | 19.0 |
| 51–60 | 11 | 7.0 |
| > 60 | 1 | 0.6 |
| **Total work experience** | | |
| ≤ 5 | 31 | 19.6 |
| 6–10 | 43 | 27.2 |
| 11–15 | 36 | 22.8 |
| 16–20 | 19 | 12.0 |
| > 20 | 29 | 18.4 |
| **Qualification** | | |
| High school certificate | 8 | 4.5 |
| Industry certificate | 2 | 1.3 |
| Some university | 22 | 14.0 |
| College (e.g. certificate/diploma) | 19 | 12.1 |
| Diploma | 36 | 22.9 |
| Degree (3 year) | 35 | 22.3 |
| Honours (4 years) | 27 | 17.2 |
| Master's | 3 | 1.9 |
| Doctorate | 6 | 3.8 |
| **Gender** | | |
| Male | 107 | 67.8 |
| Female | 51 | 32.2 |

**TABLE 2:** Mean, standard deviation and construct reliabilities.

| Constructs | Items | Mean | Standard deviation | Cronbach's alpha | Minimum factor loading |
|---|---|---|---|---|---|
| Role conflict | 3 | 3.65 | 0.82 | 0.605† | 0.691 |
| Role ambiguity | 3 | 2.19 | 0.82 | 0.827 | 0.748 |
| Supervisor support | 4 | 3.69 | 0.99 | 0.924 | 0.769 |
| Job satisfaction | 4 | 3.42 | 0.93 | 0.901 | 0.750 |
| Job performance | 3 | 3.34 | 0.99 | 0.885 | 0.727 |
| Turnover intention | 3 | 3.16 | 1.19 | 0.881 | 0.766 |

*N* = 158.

†, Construct below the normal cut-off of 0.70.

**TABLE 3:** Correlation matrix for job stressors, supervisor support, job satisfaction and job performance on employee turnover intention.

| Variable | (1) | (2) | (3) | (4) | (5) |
|---|---|---|---|---|---|
| Turnover intention (DV) | 1.000 | - | - | - | - |
| Role stressors | 0.257 | 1.000 | - | - | - |
| Supervisor support | -0.402 | -0.436 | 1.000 | - | - |
| Job satisfaction | -0.520 | -0.270 | 0.449 | 1.000 | - |
| Job performance | -0.368 | -0.221 | 0.475 | 0.542 | 1.000 |

*N* = 158.

Turnover intention is the dependent variable (DV).

All correlations are statistically significant at *p* < 0.01

**TABLE 4:** Regression analysis of role stress on job satisfaction.

| Independent variable | *b* | *t* | *p* |
|---|---|---|---|
| Role stressors | -0.270* | -3.496 | 0.001 |
| $R^2$ | 0.073 | - | - |

*b*, standardised beta; *t*, *t* test statistic; *p*, probability value.

*, *p* < 0.05

$R^2$, R-squared (coefficient of determination)

generally low. Role conflict scores (mean = 3.65, SD = 0.82) suggest that this stressor was prevalent in their jobs. Scores for job satisfaction (mean = 3.42, SD = 0.93) suggest that many respondents were only slightly satisfied with their jobs. Supervisor support had the highest performance score (mean = 3.69, SD = 0.99).

Table 3 shows that the scales were tested for independence using Pearson's product-moment correlation. All correlations were significant at *p* < 0.01 levels. The composite role stressor construct had a small positive relationship with turnover intention (*r* = 0.257, *n* = 158, *p* < 0.01). Job satisfaction has a strong negative relationship with turnover intention (*r* = -0.520, *n* = 158, *p* < 0.01). Job performance has a moderately negative relationship with turnover intention (*r* = -0.368, *n* = 158, *p* < 0.01) and a moderately positive relationship with supervisor support (*r* = -0.475, *n* = 158, *p* < 0.01). Supervisor support has a moderately negative relationship with turnover intention (*r* = -0.402, *n* = 158, *p* < 0.01). The correlation between job satisfaction and supervisor support (*r* = 0.448, *n* = 158, *p* < 0.01) was also moderate. Preliminary analyses were performed to ensure no violation of the assumptions of normality, linearity and homoscedasticity existed. Intercorrelations among scales did not exceed 0.70, therefore the independence of the scales was considered adequate for this study.

Hypothesis 1 predicted a negative relationship between role stressors and job satisfaction. The standard regression analysis presented in Table 4 supports hypothesis 1. Further analysis compared the independent contribution of role ambiguity and role conflict to job satisfaction. The beta-value for role ambiguity (beta = -0.273, *p* < 0.001) was higher than role conflict (beta = -0.123, *p* < 0.174, NS, nonsignificant) and statistically significant, suggesting that only role ambiguity made a unique contribution to predicting job satisfaction.

Hypothesis 2 proposed that *job satisfaction* mediates the relationship between role stressors and turnover intention. Hayes' (2012) PROCESS macro for statistical mediation analysis was applied once it was verified that the data had met the assumptions of linearity, normally distributed errors and uncorrelated errors. Table 5 shows the means, standard deviations and intercorrelations. Figure 2 shows the values of *b* and *p* for the effects. As Figure 3 illustrates, the standardised regression coefficient between role stress and job satisfaction was statistically significant, as was the standardised regression coefficient between job satisfaction and turnover intentions. These results support the mediational hypothesis. Role stressor was no longer a significant predictor of turnover intentions after controlling for the mediator, job satisfaction, *b* = 0.262, SE = 0.146, ns, consistent with full mediation.

Results of the analysis, along with descriptive statistics (item means and standard deviations), are presented in Table 2. While the mean score for turnover intention (mean = 3.16, SD = 1.19) appeared neutral, the SD score suggest a wide difference of opinion among respondents. Job performance scores (mean = 3.34, SD = 0.99) appeared somewhat neutral. Role ambiguity scores (mean = 2.19, SD = 0.82) were

**TABLE 5:** Means, standard deviations and intercorrelations for job satisfaction, role stressors and turnover intentions.

| Variable | Mean | Standard Deviation | 1 | 2 | 3 |
|---|---|---|---|---|---|
| Job satisfaction | 3.42 | 0.93 | - | -0.270 | -0.520 |
| Role stressors | 2.92 | 0.57 | - | - | 0.257 |
| Turnover intentions | 3.16 | 1.19 | - | - | - |

$N$ = 158.

Turnover intention is the dependent variable (DV).

All correlations are statistically significant at $p < 0.01$



$b$, standardised beta; $p$, probability value; BCa CI, bootstrapped confidence interval.

**FIGURE 2:** Diagram of the job satisfaction mediation model with regression coefficients, indirect effects and bootstrapped confidence intervals.
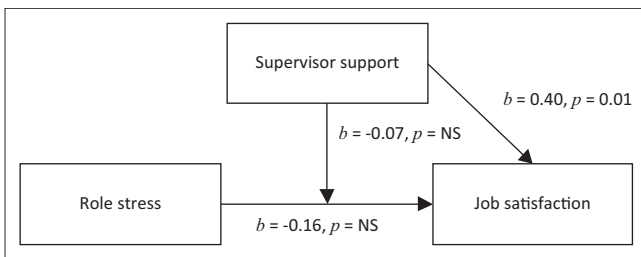


$b$, standardised beta; $p$, probability value; BCa CI, bootstrapped confidence interval.

**FIGURE 3:** Diagram of the job satisfaction moderation model with regression coefficients and interaction effect.

**TABLE 6:** Multiple regression analysis' summary for role stressors and job satisfaction moderated by supervisor support.

| Variable | $b$ | Standard error of the B coefficient | $t$ | $p$ |
|---|---|---|---|---|
| Supervisor support (centred) | 0.3965 | 0.0775 | 5.1149 | < 0.001 |
| Role stress (centred) | -0.1550 | 0.1480 | -1.0471 | NS |
| Role stress × supervisor support | -0.0691 | 0.0890 | -0.7767 | NS |
| Constant | 3.4007 | 0.0759 | -44.8056 | < 0.001 |

$b$, standardised beta; $t$, $t$ test statistic; $p$, probability value.

NS, nonsignificant at the 0.05 probability level.

$N$ = 158; $R^2$ = 0.21; $F(3, 154)$ = 16.54, $p < 0.01$.

**TABLE 7:** Means, standard deviations and intercorrelations for supervisor support, role stressors and for job satisfaction.

| Variable | Mean | Standard deviation | 1 | 2 | 3 |
|---|---|---|---|---|---|
| Supervisor support | 3.69 | 0.99 | - | -0.436 | 0.449 |
| Role stressors | 2.92 | 0.57 | - | - | -0.270 |
| Job satisfaction | 3.42 | 0.93 | - | - | - |

$N$ = 158.

Job Satisfaction is the dependent variable (DV).

All correlations are statistically significant at $p < 0.01$

The indirect effect of X on Y, the model with the relationship between *role stressor* and *turnover intentions* being mediated by *job satisfaction,* were computed for 1000 bootstrapped samples at the 95% confidence interval (Hayes, 2013).

The indirect effect was statistically significant. Thus, this analysis confirms that job satisfaction fully mediates the relationship between role stressors and turnover intentions, $b = 0.27$, bias-corrected and accelerated (BCa) bootstrap confidence interval (CI) (0.1268, 0.473).

Hypothesis 3 proposed that *supervisor support* would moderate the relationship between role stressors and job satisfaction. Once again, the data met the assumptions of linearity, normally distributed errors and uncorrelated errors. Hayes' (2012) PROCESS macro for statistical moderation analysis was applied to determine if supervisor moderates the relationship between role stress and job satisfaction. A statistically significant interaction was found [$F(3,154) = 16.54$, $p < 0.001$, $R$ squared = 0.21] for the model of supervisor support, role stress and the interaction of role stress and supervisor support. This model predicts 21% of the variance in job satisfaction. Table 6, however, shows that the interaction effect of role stress × supervisor support was not significant, suggesting that supervisor support was not moderating the relationship between role stressors and job satisfaction.

There was no statistically significant negative relationship between role stress and job satisfaction [$b = -0.87$, 95% CI (-0.349, 0.176), $t = -0.6516$, $p = $ NS]. When supervisor support was at the mean, there was no statistically significant negative relationship between role stress and job satisfaction [$b = -0.16$, 95% CI (-0.447, -0.1374), $t = -1.0471$, $p = $ NS]. Finally, when supervisor support was high, there was no statistically significant negative relationship between role stress and job satisfaction [$b = -0.22$, 95% CI (-0.627, -0.1801), $t = -1.0937$, $p = $ NS]. Both sets of predictor data were centred using the PROCESS command to conduct a slope analysis (Hayes, 2012). The pattern derived from the results diagrammed in Figures 4 and 5 confirms the existence of a main effect for supervisor support but not for an interaction effect of role stress (RSt) × supervisor support (SUPS) on job satisfaction (JS).

Hypothesis 4 proposed that *supervisor support* would play a mediating role between role stressors and job satisfaction. Table 7 shows the means, standard deviations and intercorrelations. Figures 4 and 5 confirm that supervisor support fully mediates the relationship between role stressors and job satisfaction [$b = -0.29$, BCa CI (-0.4634, -1.694)].

Hypothesis 5 proposed that *supervisor support* would also play a mediating role between the role stressors and job performance. Table 8 shows the means, standard deviations and intercorrelations. Figure 6 shows the values of $b$ and $p$ for the effects. The analysis confirms that supervisor support fully mediates the relationship between role stressors and job performance [$b = -0.35$, BCa CI (-0.533, -0.208)].

# Discussion

This research examined how role stressors influenced job satisfaction among IT personnel, the extent to which the role stressor–turnover intentions relationship is mediated by job
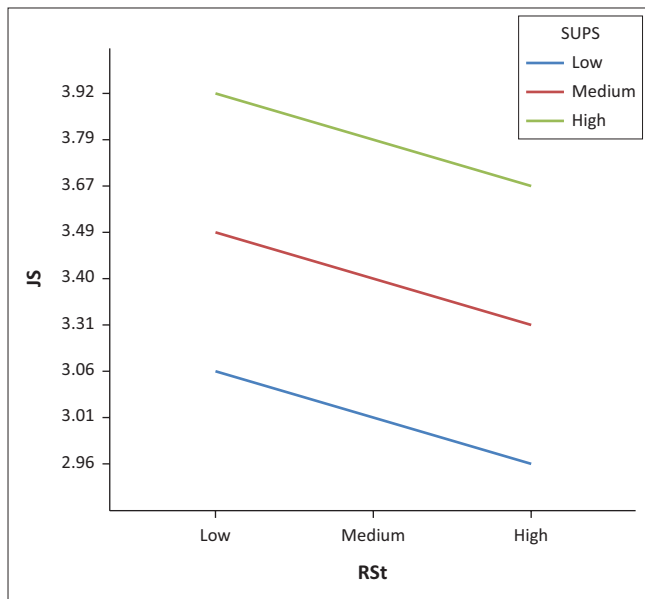
RSt, role stress; SUPS, supervisor support; JS, job satisfaction.

**FIGURE 4:** Graphing the interaction effects of role stressors and supervisor support in the prediction of job satisfaction.



*Direct effect, b = -0.15, p = 0.252*
*Indirect effect, b = -0.29, BCa CI [-0.4634, -1.694]*
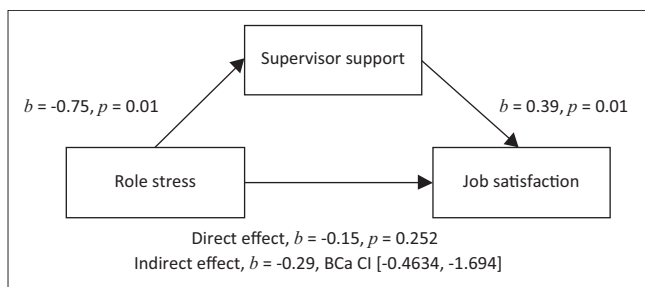
*b*, standardised beta; *p*, probability value; BCa CI, bootstrapped confidence interval.

**FIGURE 5:** Diagram of the supervisor support mediation model with regression coefficients, indirect effects and bootstrapped confidence intervals.

**TABLE 8:** Means, standard deviations and intercorrelations for supervisor support, role stressors and for job performance.

| Variable | Mean | Standard deviation | 1 | 2 | 3 |
|---|---|---|---|---|---|
| Supervisor support | 3.69 | 0.99 | - | -0.270 | 0.475 |
| Role stressors | 2.92 | 0.57 | - | - | -0.221 |
| Job performance | 3.34 | 0.99 | - | - | - |

$N = 158$.
Turnover intention is the dependent variable (DV).
All correlations are statistically significant at $p < 0.01$

satisfaction, the extent to which the role stressor job satisfaction relationship is moderated and/or mediated by supervisor support and the extent to which the role stressor–job performance relationship is also mediated by supervisor support. The results from the empirical study of 158 IT personnel supports Hypotheses 1, 2, 4 and 5. The results provided no evidence in favour of Hypotheses 3 which proposed a moderating role of supervisor support.

As predicted, there was a negative relationship between role stressors and job satisfaction. Furthermore, in this study, the role stressor, role ambiguity, was the sole predictor of turnover intention (and not role conflict). The negative



*Direct effect, b = -0.035, p = 0.080*
*Indirect effect, b = -0.35, BCa CI [-0.533, -0.208]*
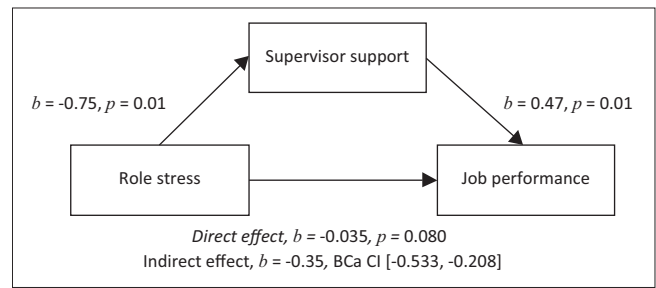
*b*, standardised beta; *p*, probability value; BCa CI, bootstrapped confidence interval.

**FIGURE 6:** Diagram of the supervisor support mediation model with regression coefficients, indirect effects and bootstrapped confidence intervals.

influence of role ambiguity compared with other role stressors has been noted by other researchers (Zhao & Rashid, 2010). Still, it is interesting that IT personnel in South Africa have a higher tolerance for role conflict than for role ambiguity. Role ambiguity issues around aspects, such as unclear or inadequate information or lack of authority to accomplish tasks, remain a major concern.

Furthermore, this study emphasises the importance of adopting strategies to deliver more supervisor support for IT personnel in the workplace (Krishnan & Singh, 2010; Lacity, Iyer & Rudramuniyaiah, 2009; Thatcher, Liu, Stepina, Goodman & Treadway, 2006). There is clear evidence that role stressors are a risk that leads to turnover intentions among IT personnel. However, the findings in this research suggest that supervisor support and job satisfaction function as mediators in this relationship. The results provided no evidence in favour of the so-called buffering effect or moderating role of supervisor support.

The mediating role of supervisor support on influencing role conflict and role ambiguity on job satisfaction suggest that employees who perceive higher levels of role conflict and role ambiguity would be less satisfied with their job and consequently have higher intentions to leave the organisation. Supervisor support considerably increased job satisfaction despite the presence of role stress. It is likely that the IT staff's relationship with supervisors enabled them to handle the presence of role stress by either decreasing the threats associated with role-related issues or by increasing the motivational resources available to cope with role-related issues.

Information Technology personnel who report higher levels of supervisor support and greater job satisfaction have better relational and psychological resources for coping with role stressors. These forms of coping, in turn, lead to lower intentions to leave among employees. So supervisor support and job satisfaction are two mechanisms that the organisation can use to mitigate the risk of role stressors. The role of supervisor support is not limited to reducing the effects of role stressors on turnover intentions. Supervisors also need to play an active role in the career development opportunities for employees. There is clear evidence from this study that supervisor support also encourages better job performance even in the presence of job stressors. Finally, despite

innovative job designs based on concepts such as self-management, agility and autonomous work teams, this study provides evidence that supervisor support remains vital in reducing the impact of role stress, increasing job satisfaction and improving the job performance of IT personnel.

## Practical implications

The current social and business climate places extra demands on IT employees and involves various role stressors, especially role ambiguity. One practical implication of this research is that role ambiguity has a much greater impact on turnover intention than role conflict, so organisations should give the highest priority to tackling role ambiguity in managing role stress. The second practical implication of the findings is the importance of supervisor support as an intervention in the presence of role stress. The third practical implication of these findings is the importance of keeping job satisfaction as high as possible in the presence of role stressors. The findings suggest that much of the impact of role stressors on turnover intentions goes through job satisfaction and if management can find ways to increase job satisfaction, they may be able to retain their employees even though role stress is present. Supervisor support and being sensitive to job satisfaction needs can go a long way in compensating for the negative effects of role stressors.

## Limitations and recommendations

The present research has several limitations that should be noted. Firstly, the study drew from a sample frame of IT professionals. Therefore, these findings must be confirmed for other types of IT workers. Secondly, the study also suffered from biases inherent in most voluntary survey-based research. In the case of this survey, the responses were skewed towards respondents who were receiving high degrees of supervisor support. Furthermore, this survey was limited to views of relatively older and more experienced IT professionals. Thirdly, supervisor support was the only relational resource investigated in reducing role stress. There are potentially more valuable relational resources. For example, future studies can examine the influence of organisational support, co-worker support, supervisor support and even family support. Prior research has also shown that the relationship between role stressors and intention to quit may vary widely, depending on the functional role and level of employees. Future studies could focus on the broader organisational hierarchy in IT and IT job types, and investigate how these differences may influence role stress and turnover. Finally, this study assumes that role stressors are generally constraining in nature. However, sometimes stressful demands can lead to personal development (Qasim et al., 2014). Future research could investigate the potential gains of role stress for individuals under certain conditions.

## Conclusion

Despite the recent innovative job designs in IT, based on concepts such as self-management, agility and autonomous work teams, this study provides evidence that traditional relational support structures such as supervisor support are still vital in improving overall job satisfaction and job performance of IT personnel, in the presence of role stress. Supervisors are crucial in helping IT personnel to remain satisfied and to perform well in spite of role stress. This relational support ultimately contributes to the retention of scarce IT talent. To improve staff retention, human resource managers, IT managers as well as IT supervisors could use these results to manage role stressors by also increasing job satisfaction to prevent unwanted turnover. Studies of relational support in IT can provide IT leaders in this era of increasing role changes and work-related stress with new insights on how to improve employee performance and IT talent retention.

## Acknowledgements

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# Investigating the impact of a combined approach of perceived organisational support for strengths use and deficit correction on employee outcomes

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**Orientation:** The positive psychology paradigm suggests a balanced focus on employee strengths and deficits. However, an overemphasis on strengths has raised questions regarding the value of a focus on strengths use, deficit improvement or a combined approach with a balanced focus on both.

**Research purpose:** The primary objective was to examine whether perceived organisational support (POS) for strengths use, POS for deficit improvement or a combined approach would be the strongest predictor of work engagement, learning, job satisfaction and turnover intention.

**Motivation for the study:** In the literature, there is little empirical evidence to support an approach where both employees' strengths are used and their deficits improved.

**Research design, approach and method:** This study was conducted among 266 teachers from four public schools in the Western Cape. A cross-sectional survey design was used.

**Main findings:** The results suggest that both strengths use and deficit improvement are important predictors of work engagement, learning, job satisfaction and turnover intention. Learning was higher and turnover intention lower for individuals experiencing a combined approach compared to those believing that their school did not support them in either using their strengths or improving their deficits. Furthermore, a combined approach was associated with higher job satisfaction than a strengths-based approach, and a deficit-based approach was shown to be associated with higher levels of work engagement and lower turnover intentions compared to an environment where neither employees' strengths nor deficits were addressed.

**Practical or managerial implications:** The results urge organisations to invest an equal amount of resources in their employees' strengths and deficits, as opposed to neglecting either one. Such a combined approach may be associated with increased work engagement, learning and job satisfaction and lower turnover intention.

**Contribution:** This study provides empirical evidence that supports a combined approach where both employees' strengths are used and their deficits developed.

## Introduction

Scholars in the field of positive psychology are promoting an equal focus on individuals' deficits and strengths (Seligman, 2002; Seligman & Csikszentmihalyi, 2000). In a work-related context, Van Woerkom Mostert, Els, Bakker and De Beer (2016) argue that employees are dependent on their organisations to support them to improve or develop their deficits *and* to use their strengths. In their research, Van Woerkom et al. (2016) refer to perceived organisational support (POS) for strengths use to indicate the extent to which employees believe that their organisations are supportive of them applying their strengths in the workplace. Similarly, POS for deficit correction refers to the extent to which employees perceive their organisation as supportive of them in developing their deficits. Although Van Woerkom et al. (2016) and other scholars promote a combined approach, studies usually focus on either strengths or deficits and rarely on a combined approach where both constructs are included.

In the literature it is found that organisations often take a deficit-based approach towards employee development by identifying employee deficits that compromise their performance in a

performance appraisal and by providing support in narrowing the gap between actual and desirable performance through training, coaching or feedback (e.g. Carr, 2004; Slade, 2010; Swanson & Holton, 2001; Wood & Tarrier, 2010). The focus on deficits or performance problems becomes evident in systematic approaches to human resources development that depart from a needs analysis, in which actual and desired end states are compared (Swanson & Holton, 2001), or in the competence management approach, in which employees are assessed and developed against a fixed set of competencies (Hall, 2004). Although such a deficit-based approach may indeed lead to considerable performance improvement (Dunn & Shriner, 1999; Ericsson, Nandagopal & Roring, 2009; LaFleur & Hyten, 1995), it does not acknowledge the fact that employees also have strengths, individual characteristics, traits and abilities that, when used, are energising and allow a person to perform at his or her personal best (Linley & Harrington, 2006; Wood, Linley, Maltby, Kashdan & Hurling, 2011).

Research has suggested that individuals can greatly benefit from using their strengths, because these refer to tasks for which the individual has an innate ability (Buckingham & Clifton, 2001). Previous research has found that strengths use is related to higher levels of self-efficacy (Falender & Shafranske, 2004; Van Woerkom, Oerlemans & Bakker, 2015b), increased happiness and vitality (Govindji & Linley, 2007), subjective well-being (Proctor, Maltby & Linley, 2011), increased work engagement (Harzer & Ruch, 2012, 2013; Linley & Harrington, 2006), goal attainment (Linley, Nielsen, Wood, Gillett & Biswas-Diener, 2010), increased in-role and out-role performance (Van Woerkom & Meyers, 2015) and lower levels of sick leave (Van Woerkom, Bakker & Nishii, 2015a). Recently, however, some scholars have objected that the positive psychology movement has again created an imbalance by focusing almost exclusively on employee strengths while failing to pay an equal amount of attention to employee deficits (Rust, Diessner & Reade, 2009; Sirmon, Hitt, Arregle & Campbell, 2010).

Thus, from the above arguments, it is suggested that in organisations there seems to be either an overemphasis on employee strengths or on deficits. Previous research, however, has not investigated empirically whether a focus on strengths use, a focus on deficit correction or a combined approach (focusing on both strengths use and deficit correction) may be more advantageous to the organisation. It therefore seems as if organisations are not grasping the possible positive outcomes that a combined approach (considering both strengths use and deficit correction as equally important) may offer. This study aims to address this issue by empirically investigating three possibilities: whether (1) POS for strengths use on its own, (2) POS for deficit correction on its own or (3) a combined approach including both POS for strengths use and POS for deficit correction will best predict employee outcomes, including work engagement, learning, job satisfaction and turnover intention. All these outcomes have been proven to affect the

bottom line of the organisation and are therefore important constructs for organisational and individual performance (Bakker & Bal, 2010; Cropanzano, Rupp & Byrne, 2003; Judge, Thoresen, Bono & Patton, 2001; Porath, Spreitzer, Gibson & Garnett, 2012).

It can also be argued that the teaching profession in particular is in need of a study where the effects of POS for strengths use and POS for deficit correction on employee outcomes are investigated. This profession is typically characterised by high levels of burnout (Johnson, 2015), low work engagement (Buron & Lassibille, 2016), psychological distress and depression (Domingo et al., 2015), low job satisfaction and high turnover (Shaw & Newton, 2014; Skaalvik & Skaalvik, 2011). This clearly illustrates the need to examine whether intervention strategies, namely a strengths-based approach, a deficit-based approach or a combination of the two, may improve outcomes relevant to the teaching profession.

## Purpose

The primary objective of this study was to examine which approach will best predict employee outcomes (i.e. work engagement, learning, job satisfaction and turnover intention): (1) an exclusive focus on POS for strengths use; (2) an exclusive focus on POS for deficit improvement or (3) an approach where both POS for strengths use and POS for deficit correction is combined.

## Literature review

### Perceived organisational support for deficit correction and for strengths use

*Perceived organisational support* refers to employees' overall beliefs about the extent to which the organisation values their contributions and cares about their well-being (Rhoades, Eisenberger & Armali, 2001). Although POS for strengths use and deficit correction is related to general POS, the latter construct is much broader. For example, the organisation can also value the employee's contribution by appreciating the fact that the employee is working overtime or care about employees' well-being by encouraging a healthy work–home balance. Employees will perceive organisational support for strengths use when they believe that the organisation actively supports them in applying their strengths at work (Keenan & Mostert, 2013), for instance by making use of complementary partnering with colleagues or by adapting the task allocation to employees' individual strengths (Linley & Harrington, 2006). This may implicate that the performance requirements for two individual employees may change, while together they are still responsible for the same tasks, making individual deficits less important for their performance.

Employees will perceive organisational support for deficit correction when they believe that their organisation actively supports them in correcting their deficits. An example of this is when employee deficits that compromise performance are identified in a performance appraisal (Swanson & Holton, 2001) and when the organisation supports the employee in

narrowing the gap between the actual and desirable performance by providing training, coaching, feedback or on-the-job learning processes.

Both POS for strengths use and POS for deficit correction may be conceptualised as job resources that are instrumental in achieving organisational and personal work goals, and that may stimulate employees' growth, learning and development (Bakker & Demerouti, 2007; Van Woerkom et al., 2016). When employees are able to use their unique strengths, they are more likely to achieve performance goals. Also, it is likely that these performance goals will be more self-concordant (Sheldon & Elliot, 1999) and therefore that employees will be more persistent in achieving these goals (Koestner, Lekes, Powers & Chicoine, 2002). Moreover, using one's strengths enhances feelings of competence (Peterson & Seligman, 2004), which will support employees in coping with job demands (Folkman & Moskowitz, 2004; Van Woerkom et al., 2015a). In addition, furthering one's best skills and abilities leads to steep learning curves, thereby stimulating employee development (Peterson & Seligman, 2004).

Perceived organisational support for deficit correction may also be seen as a job resource because remediating one's weaknesses facilitates goal attainment and employee development. As workers who feel incompetent report higher levels of stress or burnout (e.g. Brouwers & Tomic, 2000; Maslach, Schaufeli & Leiter, 2001), correcting performance deficits by engaging in learning opportunities may reduce job demands, alleviate stress and provide opportunities for growth and development.

### Employee outcomes of perceived organisational support for strengths use and for deficit correction

Following the conceptualisation of POS for strengths use and POS for deficit correction as job resources, these two concepts may be associated with the positive outcomes that are associated with job resources. According to the job demands–resources (JD-R) model, job resources are related to positive outcomes, including work engagement (Bakker & Demerouti, 2007), learning opportunities (Van Ruysseveldt, Proost & Verboon, 2011), job satisfaction and the intention to stay with the company (Jones, Chonko, Rangarajan & Roberts, 2007; Skaalvik & Skaalvik, 2009).

Work engagement is described as a positive, fulfilling work-related state that can be characterised by vigour, dedication and absorption (Schaufeli & Bakker, 2004; Schaufeli, Salanova, González-Romá & Bakker, 2002). Vigour is characterised by high levels of energy and mental resilience while working, the willingness to invest effort in one's work and persistence even in the face of difficulties (Schaufeli et al., 2002). Dedication refers to being strongly involved in one's work and experiencing a sense of significance, enthusiasm and challenge (Schaufeli et al., 2002). Recent studies suggest that vigour and dedication are the core dimensions of work engagement (Llorens, Schaufeli, Bakker & Salanova, 2007; Schaufeli & Bakker, 2004). According to

the JD-R theory, job resources are the strongest drivers for work engagement. More specifically, aspects of the job like autonomy, supervisory relationships, opportunities for growth, colleague support, et cetera, greatly influence an employee's levels of work engagement (Bakker, 2011; Bakker & Bal, 2010). This argument is built on the hypothesis that job resources influence work engagement because of the motivational nature of these resources. It is believed that job resources may play an intrinsic motivational role because they foster growth and learning, or they can play an extrinsic motivational role because they are instrumental in achieving work goals (Bakker & Demerouti, 2007). Therefore, job resources have a motivational potential and are associated with increased work engagement (Bakker & Bal, 2010).

It can therefore be expected that the two job resources, POS for strengths use and POS for deficit correction, may lead to increased work engagement. When employees apply their strengths at work and can do what comes naturally to them, they will feel more energised and intrinsically motivated, making them more vigorous and dedicated to their work (Biswas-Diener, 2010). Similarly, when employees feel supported to develop competencies that do not come naturally to them, this may foster their feeling of learning, growth and personal development, which have been found to be associated with work engagement (Bakker, 2011; Mauno, Kinnunen, Mäkikangas & Feldt, 2010). Within the teaching profession, research has also indicated that support by the school and opportunities for development may increase teachers' work engagement (Bakker & Bal, 2010). Similarly, it can be argued that when teachers feel competent in what they do and thus experience self-efficacy, they tend to experience higher levels of work engagement (Skaalvik & Skaalvik, 2014). For these reasons, we expect that both POS for strengths use and POS for deficit correction will increase employees' levels of work engagement.

Learning can be described as the acquisition and application of knowledge and skills and is defined as an important component of thriving (Spreitzer, Sutcliffe, Dutton, Sonenshein & Grant, 2005). On the one hand, POS for deficit correction can be expected to foster the acquisition of new skills, for example, by providing employees with opportunities for training or coaching. On the other hand, providing employees with the opportunity to use their strengths is likely to lead to the application of knowledge and skills. Also, learning curves tend to be steep when people get the chance to practice their best skills and abilities (Peterson & Seligman, 2004). This was confirmed in a study by Meyers, Van Woerkom, De Reuver, Bakk and Oberski (2015), who found that both an intervention to promote strengths use and an intervention to promote deficit correction led to increases in students' personal growth initiative, although these increases were bigger for the strengths intervention group.

The extent to which employees feel that their organisation provides them with the desired support to use their strengths

or remediate their deficits may also influence employees' attitudes regarding their work. When organisations are committed to employee development, employees may feel that they are important to the organisation and may feel more optimistic about the future (Xanthopoulou, Bakker, Demerouti & Schaufeli, 2007), which may increase their satisfaction with their job and reduce their intention to leave the organisation. Similarly, when employees feel that their work is designed in such a manner that they can do what they are good at, they may find their work more meaningful and may derive more pleasure from their daily activities (Harzer & Ruch, 2013; Littman-Ovadia & Steger, 2010). This in turn may influence their satisfaction with their work environment and reduce the risk of them leaving the organisation. Also, using strengths at work and mastering new skills may foster a sense of competence and self-efficacy, making employees feel more in control over their own performance (Bell & Kozlowski, 2008; Peterson & Seligman, 2004). This positive attitude may lead to higher levels of job satisfaction and a lower turnover intention. It can therefore be argued that, when teachers feel competent and skilled in what they are doing (i.e. either by means of applying their strengths or by training and learning activities to develop the work-related aspects they are not good at), they are likely to experience stronger job satisfaction and are less likely to want to leave the profession (Høigaard, Giske & Sundsli, 2012).

Based on the arguments above, it is proposed that both POS for strengths use and POS for deficit correction may be associated with higher levels of work engagement, learning and job satisfaction and lower levels of intention to leave. What we do not know, however, is to what extent one of these approaches is more beneficial than the other, or to what extent a combined approach, focusing on both strengths use and deficit correction, is even more advantageous to the organisation. For this reason we tested three different conceptual models (see Figure 1). In Model A the path from POS for deficit correction was constrained to zero, and the unique contribution of POS for strengths use to each of the outcome variables was examined. In Model B the path from POS for strengths use was constrained to zero, and the unique contribution of POS for deficit correction to each of the outcome variables was examined. Finally, in Model C none of the paths were constrained to zero, and thus the covariance between POS for strengths use and POS for deficit correction were also taken into account.

## Research method
### Research approach

This study followed a quantitative research design and cross-sectional data were collected by means of surveys. Therefore, data were collected at one particular point in time (Trochim & Donnelly, 2007).

### Measures
#### Participants

The study population consisted of teachers from public schools in the Western Cape, South Africa. According to the
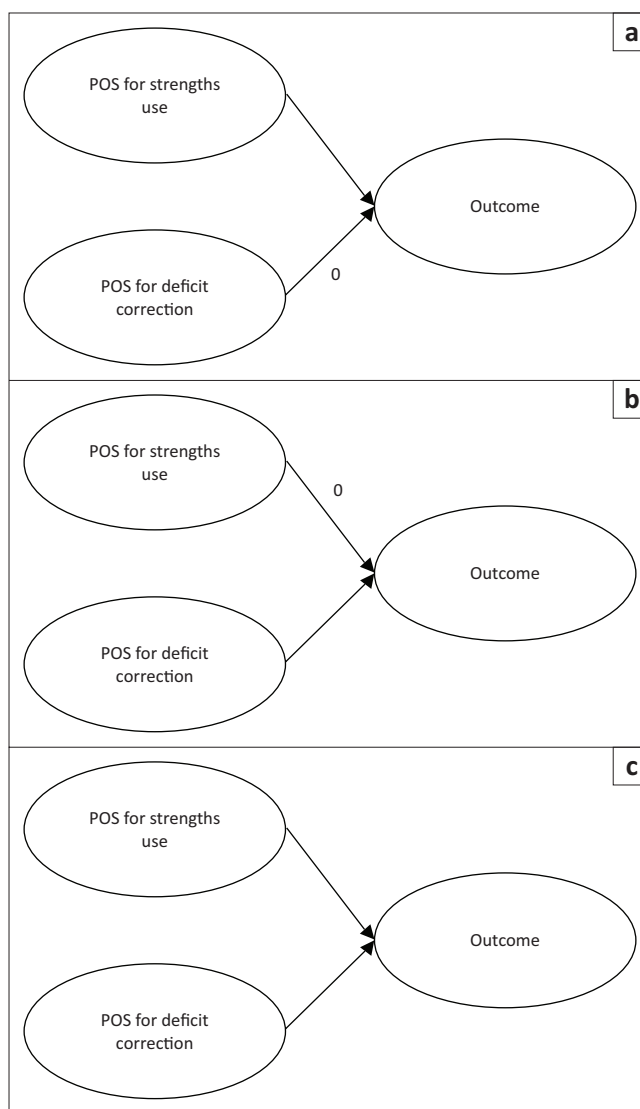


POS, perceived organisational support.

**FIGURE 1:** Conceptual models. (a) Model A, (b) Model B and (c) Model C.

Department of Basic Education of the Republic of South Africa (2014), there are approximately 11 062 educators employed in secondary schools in the Western Cape. A convenient sample of 266 teachers was drawn for the purpose of this study ($n$ = 266). The characteristics of the participants are presented in Table 1. The majority of the sample consisted of females (64.6%). The majority were Afrikaans speaking (94.50%), followed by English speaking (3.7%). The mean age of the sample was 48.28 years, and almost one-third of the participants (34.70%) held a university degree. The majority of the teachers had been with their current school for less than 5 years (34.20%).

#### Measuring instruments

The strengths use and deficit correction questionnaire (Van Woerkom et al., 2016) was used to measure POS for strengths use and POS for deficit improvement. These constructs were measured on a seven-point Likert-type scale ranging from 0 (never) to 6 (almost always). POS for strengths use was measured with five items (e.g. 'This organisation ensures that people can apply their strong points in their jobs'; α = 0.96)

and POS for deficit correction was also measured with five items (e.g. 'In this organisation I receive training to improve my weak points'; α = 0.93).

The Utrecht Work Engagement Scale (UWES) was used to measure the two core dimensions of work engagement, namely vigour and dedication (see Schaufeli & Bakker, 2004). Vigour was measured with six items (e.g. 'At my work, I feel I am bursting with energy') and dedication with five items (e.g. 'I am enthusiastic about my job'). All items were measured on a seven-point frequency-rating scale, varying from 0 (never) to 6 (every day). The reliability for use of the UWES within the South African context has been confirmed with Cronbach's alpha coefficients for vigour (α = 0.78) and dedication (α = 0.89; Storm & Rothmann, 2003).

Learning, as a dimension of thriving, was measured with the Thriving at Work Scale developed by Porath et al. (2012). This questionnaire measures learning with five items (e.g. 'I continue to learn more and more as time goes by') on a scale

from 0 (strongly disagree) to 6 (strongly agree). The internal consistency of the instrument was confirmed in previous studies, with Cronbach's alpha coefficients ranging from 0.88 to 0.93 (Porath et al., 2012).

The Job Satisfaction Scale, developed by Hellgren, Sjöberg and Sverke (1997) (based on Brayfield & Rothe, 1951), was used to examine job satisfaction. This instrument consists of three items (e.g. 'I am satisfied with my job') rated on a Likert scale ranging from 1 (strongly agree) to 5 (strongly disagree). The reliability of this instrument has been confirmed in South Africa (α = 0.75; Masia & Pienaar, 2011).

Turnover intention was measured with a scale developed by Sjöberg and Sverke (2000). The items are measured with a total of three items (e.g. 'I am actively looking for other jobs'). The items are measured on a five-point Likert scale ranging from 1 (strongly agree) to 5 (strongly disagree). This scale has been proven to be reliable within the South African context, with Cronbach's alpha coefficients ranging between 0.74 (Pienaar, Sieberhagen & Mostert, 2007) and 0.79 (Diedericks & Rothmann, 2014).

In the current study all scales showed a good internal consistency with Cronbach's alpha coefficients $\geq$ 0.72 (see Table 2). Additionally, confirmatory factor analysis including all variables indicated that the overall measurement model showed an acceptable fit to the data ($\chi^2$ = 1177.00; $df$ = 572; $p$ = 0.00; comparative fit index [CFI] = 0.91; Tucker–Lewis index [TLI] = 0.90; root-mean-square error of approximation [RMSEA] = 0.06; standardised root-mean-square residual [SRMR] = 0.05).

## Analysis

The data were analysed by means of the SPSS program (IBM SPSS Inc., 2009) and Mplus 7.2. Structural equation modelling was used to assess prediction of the dependent variables (employee outcomes) by the independent variables (POS for strengths use and POS for deficit development). The goodness of fit of the models was tested using the traditional $\chi^2$ statistic, the CFI, the TLI, the RMSEA and the SRMR. General guidelines were followed and fit was considered adequate if CFI and TLI values were larger than 0.90 (Byrne, 2010). A RMSEA value of 0.05 or less indicates a good fit, whereas values between 0.05 and 0.08 represent a moderately good model fit (Van de Schoot, Lugtig & Hox, 2012). According to Hu and Bentler (1999), the SRMR value should be smaller than 0.05. The Akaike information

**TABLE 1:** Characteristics of participants.

| Item | Category | Frequency | Percentage |
|---|---|---|---|
| Gender | Male | 87 | 32.10 |
| | Female | 175 | 64.60 |
| Home language | Afrikaans | 256 | 94.50 |
| | English | 10 | 3.70 |
| | Other | 5 | 1.80 |
| Age | 16–20 years | 2 | 0.80 |
| | 21–30 years | 30 | 11.30 |
| | 31–40 years | 19 | 7.10 |
| | 41–50 years | 81 | 30.50 |
| | 51–60 years | 99 | 37.20 |
| | 60–69 years | 24 | 9.00 |
| Highest qualification | Grade 10 | 5 | 1.80 |
| | Grade 11 | 0 | 0.00 |
| | Grade 12 | 23 | 8.50 |
| | Technical College Diploma | 58 | 21.40 |
| | Technicon Diploma | 29 | 10.70 |
| | University Degree | 94 | 34.70 |
| | Post-graduate Degree | 37 | 13.70 |
| Organisation tenure | 0–5 years | 91 | 34.20 |
| | 6–10 years | 35 | 13.20 |
| | 11–20 years | 51 | 19.20 |
| | 21–30 years | 52 | 19.50 |
| | 31–40 years | 24 | 9.00 |
| | 41–50 years | 3 | 1.10 |

$N$ = 266.

**TABLE 2:** Correlation matrix ($r$) of the latent variables.

| Variable | Mean | SD | 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|---|---|---|
| 1. POS for strengths use | 4.55 | 1.08 | (0.93) | - | - | - | - | - |
| 2. POS for deficit correction | 3.93 | 1.36 | 0.54 | (0.92) | - | - | - | - |
| 3. Engagement | 5.00 | 0.88 | 0.38 | 0.40 | (0.92) | - | - | - |
| 4. Learning | 4.32 | 0.64 | 0.20 | 0.25 | 0.44 | (0.72) | - | - |
| 5. Job satisfaction | 4.20 | 0.75 | 0.33 | 0.41 | 0.55 | 0.21 | (0.90) | - |
| 6. Turnover | 2.22 | 1.03 | -0.28 | -0.26 | -0.41 | -0.19 | -0.58 | (0.83) |

All correlations are significant at the 0.01 level ($p$ ≤ 0.01); $r$ ≥ 0.30 is practically significant (medium effect); $r$ ≥ 0.50 is practically significant (large effect). Cronbach's alpha coefficients (α) are presented on the diagonal in brackets.
Mean, scale means; SD, standard deviation; POS, perceived organisational support.

criterion and sample adjusted Bayesian information criterion were used to compare the fit of competing models, where the model with the lowest value suggests superior fit (Van de Schoot et al., 2012).

One-way multivariate analysis of variance (MANOVA) was used to assess whether differences exist in work engagement, learning, job satisfaction and turnover intention between different groups (representing different levels of POS for strengths use and POS for deficit correction). The Wilks' lambda statistic was used as an indicator of the significance of group differences (Mayers, 2013). Subsequent analysis of variance (ANOVA) was then conducted to examine the differences for each outcome variable. Where significant differences were found, the Games-Howell post hoc test was used to examine the nature of these differences.

# Results

## Relationships between the variables

The correlations between the study variables are presented in Table 2. The means for the scales (and not the latent variables that were standardised), standard deviations and Cronbach's alpha coefficients of the scales are also presented. All the correlations between all the variables were statistically significant.

## Structural equation modelling

To test whether POS for strengths use and POS for deficit correction were significant predictors of our outcome variables, separate structural models were tested for each of these outcome variables (work engagement, learning, job satisfaction and turnover intention). In all models, both POS for strengths use and POS for deficit correction were included, but three competing models were tested for each outcome variable:

- In Model A, the path from POS for deficit correction to the outcome variable was constrained to zero.
- In Model B, the path from POS for strengths use to the outcome variable was constrained to zero.
- In Model C, paths from both POS for strengths use and POS for deficit correction were specified to the outcome variable (none of the paths in this model were constrained). In addition, a covariance between POS for strengths use and POS for deficit correction was included in the model.

The model fit indices and structural paths for each of the outcome variables are presented in Table 3. As can be seen

**TABLE 3:** Goodness of fit indices and structural paths investigated for the different outcome variables.

| Model | Structural path | $\beta$ | SE | $p^a$ | $\chi^2$ | $df$ | CFI | TLI | RMSEA | SRMR | AIC | BIC | $\Delta\chi^2$ | $\Delta df$ | $p^b$ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Work engagement** | | | | | | | | | | | | | | | |
| Model A | POS for strengths use → engagement | 0.38 | 0.06 | 0.00* | 633.22 | 188 | 0.89 | 0.88 | 0.09 | 0.19 | 14568.94 | 14798.29 | 113.69 | 2 | 0.00* |
| Model B | POS for deficit correction → engagement | 0.45 | 0.05 | 0.00* | 618.69 | 188 | 0.90 | 0.88 | 0.09 | 0.18 | 14554.41 | 14783.75 | 99.16 | 2 | 0.00* |
| Model C | POS for strengths use → engagement | 0.18 | 0.07 | 0.01* | 519.53 | 186 | 0.92 | 0.91 | 0.08 | 0.05 | 14459.25 | 14695.76 | - | - | - |
| | POS for deficit correction → engagement | 0.35 | 0.07 | 0.00* | - | - | - | - | - | - | - | - | - | - | - |
| **Learning** | | | | | | | | | | | | | | | |
| Model A | POS for strengths use → learning | 0.36 | 0.06 | 0.00* | 333.17 | 89 | 0.91 | 0.89 | 0.10 | 0.20 | 10947.98 | 11112.83 | 103.82 | 2 | 0.00* |
| Model B | POS for deficit correction → learning | 0.36 | 0.06 | 0.00* | 324.42 | 89 | 0.91 | 0.90 | 0.10 | 0.20 | 10939.23 | 11104.08 | 95.07 | 2 | 0.00* |
| Model C | POS for strengths use → learning | 0.13 | 0.08 | **0.11** | 229.35 | 87 | 0.95 | 0.94 | 0.08 | 0.04 | 10848.16 | 11020.17 | - | - | - |
| | POS for deficit correction → learning | 0.29 | 0.08 | 0.00* | - | - | - | - | - | - | - | - | - | - | - |
| **Job satisfaction** | | | | | | | | | | | | | | | |
| Model A | POS for strengths use → satisfaction | 0.33 | 0.04 | 0.00* | 314.53 | 64 | 0.91 | 0.89 | 0.12 | 0.24 | 8568.11 | 8711.45 | 112.64 | 2 | 0.00* |
| Model B | POS for deficit correction → satisfaction | 0.42 | 0.06 | 0.00* | 297.62 | 64 | 0.92 | 0.90 | 0.12 | 0.23 | 8551.20 | 8694.54 | 95.73 | 2 | 0.00* |
| Model C | POS for strengths use → satisfaction | 0.13 | 0.08 | **0.09** | 201.89 | 62 | 0.95 | 0.94 | 0.09 | 0.04 | 8459.47 | 8609.98 | - | - | - |
| | POS for deficit correction → satisfaction | 0.35 | 0.07 | 0.00* | - | - | - | - | - | - | - | - | - | - | - |
| **Turnover intention** | | | | | | | | | | | | | | | |
| Model A | POS for strengths use → turnover | -0.37 | 0.08 | 0.00* | 282.76 | 64 | 0.92 | 0.90 | 0.11 | 0.22 | 9347.08 | 9490.42 | 96.52 | 2 | 0.00* |
| Model B | POS for deficit correction → turnover | -0.31 | 0.06 | 0.00* | 285.38 | 64 | 0.92 | 0.90 | 0.11 | 0.22 | 9349.70 | 9493.04 | 99.14 | 2 | 0.00* |
| Model C | POS for strengths use → turnover | -0.21 | 0.08 | 0.01* | 186.24 | 62 | 0.95 | 0.94 | 0.09 | 0.04 | 9254.56 | 9405.07 | - | - | - |
| | POS for deficit correction → turnover | -0.19 | 0.08 | 0.02* | - | - | - | - | - | - | - | - | - | - | - |

*B*, beta; SE, standard error; [a], statistical significance of regression paths, values in bold not significant; [b], statistical significance of chi-squared difference; $\chi^2$, chi-squared; *df*, degrees of freedom; POS, perceived organisational support; CFI, comparative fit index; TLI, Tucker–Lewis index; RMSEA, root-mean-square error of approximation; SRMR, standardised root-mean-square residual; AIC, Akaike information criterion; BIC, Bayesian information criterion.

*, $p \leq 0.01$

**TABLE 4:** Between-group differences based on work engagement, learning, job satisfaction and turnover intention.

| Variable | Group 1: LS_LD | Group 2: HS_LD | Group 3: LS_HD | Group 4: HS_HD | F | p | Partial η² |
|---|---|---|---|---|---|---|---|
| Work engagement | 4.60 (0.91)[a] | 4.98 (0.65) | 5.14 (0.94)[b] | 5.38 (0.72)[b] | 12.84 | 0.00 | 0.14 |
| Learning | 4.08 (0.63)[a] | 4.30 (0.79) | 4.35 (0.70) | 4.47 (4.47)[b] | 5.24 | 0.01 | 0.06 |
| Job satisfaction | 3.93 (0.70)[a] | 4.05 (0.83)[c] | 4.29 (0.63)[b] | 4.55 (0.58)[b,d] | 12.48 | 0.00 | 0.13 |
| Turnover intention | 2.51 (1.04)[a] | 2.13 (0.95) | 2.31 (0.87) | 1.83 (0.96)[b] | 7.02 | 0.00 | 0.08 |

The means are presented in the table with standard deviations in brackets; statistical significance is set at $p \leq 0.05$.

LS_LD, low POS for strengths use and low POS for deficit correction; HS_LD, high POS for strengths use but low POS for deficit correction; LS_HD, low POS for strengths use but high POS for deficit correction; HS_HD, high POS for strengths use and high POS for deficit correction.

[a], Group differs statistically significantly from type (in row) where b is indicated; [c], group differs statistically significantly from type (in row) where d is indicated.

from Table 3, Model C was a significantly better model compared to Models A and B for all outcome variables. Also, the results indicate that for work engagement, in Model C both POS for strengths use ($\beta = 0.18$; $p \leq 0.01$) and POS for deficit correction ($\beta = 0.35$; $p \leq 0.01$) were significant predictors of work engagement, with POS for deficit correction being the strongest predictor. With regard to the results for learning, Model C suggests that POS for strengths use was not a significant predictor of learning in the presence of POS for deficit correction. POS for deficit correction, however, significantly predicted learning ($\beta = 0.29$; $p \leq 0.01$). The results for job satisfaction indicate that in Model C, POS for strengths use ($\beta = 0.35$; $p \leq 0.00$) significantly predicted job satisfaction, whereas POS for deficit correction did not significantly predict job satisfaction. The results with regard to turnover intention indicate that in Model C, both POS for strengths use ($\beta = -0.21$; $p \leq 0.01$) and POS for deficit correction ($\beta = -0.19$; $p \leq 0.05$) were significant predictors of turnover intention.

The results from Table 3 suggest that for all the employee outcomes (i.e. work engagement, learning, job satisfaction and turnover intention), Model C showed a significantly better fit to the data compared to Models A and B, suggesting that the model where POS for strengths use and POS for deficit correction are combined is a better model compared to the other two models, where only POS for strengths use or POS for deficit correction is included.

## Multivariate analysis of variance and analysis of variance

Multivariate analysis of variance analysis was conducted to compare four different groups of respondents on their levels of work engagement, learning, job satisfaction and turnover intention. The sample was divided into groups based on the mean scores of POS for strengths use and POS for deficit correction, in which responses below the mean were categorised as 'low' and responses above the mean were categorised as 'high'. Consequently, the following four groups were created:

- Group 1 consisted of employees experiencing low POS for strengths use and low POS for deficit correction, implying that the organisation does not provide support for employees in using strengths or developing their weaknesses.
- Group 2 consisted of employees with high POS for strengths use but low POS for deficit correction, implying mainly a strengths-based approach.

- Group 3 consisted of employees with low POS for strengths use but high POS for deficit correction, for example, following mainly a deficit-based approach.
- Group 4 comprised employees experiencing high POS for strengths use and high POS for deficit correction, meaning that these organisations followed a combined approach.

The results of the Wilks' lambda test indicated that statistically significant multivariate group differences were found [$F_{(15.657)} = 4.14$, $p \leq 0.01$; Wilks' $\lambda = 0.78$; partial η² $= 0.08$]. The results of the follow-up ANOVA indicated significant differences for each of the five outcomes. Group comparisons were made by means of the Games–Howell procedure, because the group sizes were unequal (Mayers, 2013). The results are presented in Table 4.

The ANOVA results indicate that for all outcome variables, Group 1 (low POS for strengths use; low POS for deficit correction) differed significantly from Group 4 (high POS for strengths use; high POS for deficit correction). In each of these cases the high POS for strengths use and high POS for deficit correction group showed significantly higher levels of work engagement, learning and job satisfaction and lower levels of turnover intention compared to the low POS for strengths use and low POS for deficit correction group. In addition, interesting group differences were found for work engagement and job satisfaction, with results indicating a significant difference between Group 1 (low POS for strengths use; low POS for deficit correction) and Group 3 (low POS for strengths use; high POS for deficit correction), indicating that individuals who believe their organisation provides support to remediate their deficits but does not provide support to use their strengths have significantly higher work engagement and job satisfaction when compared to employees who perceive their organisation as neither using their employees' strengths not correcting their deficits. Similarly, Group 2 (high POS for strengths use; low POS for deficit correction) showed significantly lower job satisfaction levels compared to Group 4 (high POS for strengths use; high POS for deficit correction), suggesting that employees who believe their organisation provides strengths use support but does not help them to improve their deficits reported significantly lower job satisfaction than those employees who indicated that their organisation provides support for both strengths use and deficit correction.

## Discussion
### Outline of the results

The primary objective of this study was to test three approaches and determine which approach would best

predict employee outcomes (i.e. work engagement, learning, job satisfaction and turnover intention): (1) an exclusive focus on POS for strengths use; (2) an exclusive focus on POS for deficit improvement or (3) an approach where both POS for strengths use and POS for deficit correction were combined. Our results indicate that both POS for strengths use and POS for deficit correction predict work engagement, learning and job satisfaction and are negatively related to turnover intention. This implies that when employees perceive their organisation to be supportive of them using their strengths or improving their deficits, they are more likely to experience increased levels of work engagement, learning and job satisfaction and lower intentions to leave the organisation. These results are in line with the results from previous research. A recent study by Botha and Mostert (2014) found that employees who are allowed to use their strengths at work experience higher work engagement. Other studies indicate that when individuals are given the opportunity to use their strengths (Falender & Shafranske, 2004; Peterson & Seligman, 2004) or master new skills (Bell & Kozlowski, 2008) these individuals may develop a sense of competence and self-efficacy, giving them the feeling that they have control over their own performance and that they can positively influence their environment. In a work context, such positive attitudes as a result of using one's strengths at work may potentially lead to higher levels of job satisfaction and lower levels of turnover intention. Also, research has shown that in organisations where employees receive opportunities for development, they may feel valued by the organisation (Xanthopoulou et al., 2007), which may influence their job satisfaction. Similarly, employees who feel they apply their strengths at work may feel more optimistic about their job, find their work more meaningful, and may derive more pleasure from their daily activities (Harzer & Ruch, 2013; Littman-Ovadia & Steger, 2010), which may influence their job satisfaction. Finally, our study supports advocacy for a combined approach focusing on both individuals' strengths and their deficits, as suggested by leaders in the field of positive psychology. These authors all agree that for optimal human functioning there should be an equal focus on nurturing people's strengths and repairing their weaknesses (Linley, Joseph, Harrington & Wood, 2006; Rust et al., 2009; Seligman, Parks & Steen, 2004). It is not surprising that a combined approach yields better employee results compared to an exclusive focus on POS for strengths use or POS for deficit correction. It is reasonable to expect that an organisation that both improves their employees' deficits and uses their strengths may have employees with more positive attitudes towards the organisation, because these employees feel more valued and appreciated by the organisation (Santos & Stuart, 2003; Xanthopoulou et al., 2007) and enjoy their work more (Harzer & Ruch, 2013; Schmidt, 2007), because they can do what comes naturally to them and can work on the things that they are less skilled at.

It is worthwhile to note that in our results with learning and job satisfaction as outcome variables, POS for strengths use

and POS for deficit correction were both significant predictors of these two outcomes when examined separately. However, when both POS variables were included in one model and the covariance between these two variables was taken into account, the path between POS for strengths use on the one hand and learning and job satisfaction on the other hand became insignificant. Thus, in this study POS for strengths use is a significant predictor of learning and job satisfaction when POS for deficit correction is not accounted for in the model. However, in the case where both strengths use and deficit improvement are present, POS for deficit correction may play the predominant role in increasing learning and job satisfaction, while POS for strengths use may become less significant in predicting these outcomes. A possible explanation for these results may be the nature of our sample, which consisted of secondary school teachers, who may have a predominant orientation on learning and development. Future research needs to explore to what extent these findings can be generalised to other populations. Also, because of our cross-sectional research design, we cannot rule out the possibility that reversed causality played a role in our results. This could mean that engaged and satisfied employees perceive more support for deficit correction compared to other employees, possibly because they have the energy to invest in learning processes that address their weaknesses.

Our results also suggest that for all outcome variables, the high POS for strengths use and high POS for deficit correction group showed significantly higher levels of work engagement, learning and job satisfaction and lower levels of turnover intention compared to the low POS for strengths use and low POS for deficit correction group. It can thus be expected that it will always be better to follow a combined approach of POS for strengths use and POS for deficit correction compared to a lack of support for either strengths use or deficit correction. Our results further indicate that for engagement and job satisfaction an exclusive deficit approach is also more beneficial than an absence of a strengths-based approach or a deficit-based approach. Our results also show that for increased satisfaction a combined approach focusing on both POS for strengths use and POS for deficit correction is better than an exclusive strengths-focused approach. These findings indicate that 'fixing' weaknesses is not by definition demoralising and demeaning (Hodges & Clifton, 2004) and may even contribute to employee well-being. It is thus strongly suggested that researchers acknowledge the importance of both the use of employees' strengths and the correction of their deficits, rather than overemphasising or neglecting one or the other. Using one's strengths and successfully addressing one's deficits may improve an individual's level of functioning and essentially contribute to a sense of self-actualisation. Self-actualisation is described as being the best an individual is capable of being (Maslow, 1968). Therefore, it is plausible that using one's strengths and also remediating one's deficits gives an individual a sense of competence and the feeling that their potential is realised. Therefore, positive psychology should not just concern itself

with amplifying strengths but also with supporting people in overcoming their weaknesses (Linley et al., 2006; Seligman et al., 2004).

## Practical implications

Whereas in the past human resource practices were almost exclusively aimed at identifying and correcting employees' weaknesses or deficits, the positive psychology approach has made a case for the importance of employee strengths. Our study can be seen as an investigation of the relative importance of both deficits and strengths-based approaches for promoting employee outcomes such as engagement, learning and satisfaction. The results of our study point out that a combined approach of supporting employees both in leveraging their strengths and remediating their weaknesses leads to the most favourable results in terms of important employee outcomes. Thus, it is demonstrated that, rather than overemphasising or neglecting either strengths use or deficit improvement, organisations are likely to enhance employee outcomes by investing equally in their employees' deficits and their strengths.

## Limitations and recommendations

This study is not without limitations. The cross-sectional design followed cautions the reader to prudently interpret the findings. In order to make sound inferences regarding causal relationships it is suggested that future studies examine these relationships longitudinally. Another limitation in this study was the use of self-report measures, as this threatens the validity of the findings through possible response bias (Bolt & Johnson, 2009). Although it would be ideal to assess strengths use and deficit improvement of employees with objective measures, this would likely prove to be time and resource intensive.

## Conclusion

To conclude, the results of this study clearly suggest that in an environment where the organisation follows a combined approach – focusing on both POS for strengths use and POS for deficit correction – employees are likely to experience higher levels of work engagement, learning and job satisfaction and lower turnover intention, compared to organisations where neither strengths use nor deficit improvement receive much consideration. Therefore, focusing on both strengths use and deficit improvement may benefit the individual and organisation greatly, indicating the need for employees to both use their strengths and improve their deficits in the work.

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## Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

## Authors' contributions

The first author, C.E., fulfilled the role of the primary researcher, and this study formed part of her PhD research. She was responsible for the conceptualisation of the article, collection and statistical analysis of the data, interpretation of the research results and writing of the article. K.M. acted as promoter and M.v.W. as co-promoter of this study and thus played an advisory role and assisted in the conceptualisation of the study and writing of the research article.

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# Job applicants' attitudes towards cognitive ability and personality testing

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**Orientation:** Growing research has shown that not only test validity considerations but also the test-taking attitudes of job applicants are important in the choice of selection instruments as these can contribute to test performance and the perceived fairness of the selection process.

**Research purpose:** The main purpose of this study was to determine the test-taking attitudes of a diverse group of job applicants towards personality and cognitive ability tests administered conjointly online as part of employee selection in a financial services company in South Africa.

**Motivation for the study:** If users understand how job applicants view specific test types, they will know which assessments are perceived more negatively and how this situation can potentially be rectified.

**Research design, approach and method:** A non-experimental and cross-sectional survey design was used. An adapted version of the Test Attitude Survey was used to determine job applicants' attitudes towards tests administered online as part of an employee selection process. The sample consisted of a group of job applicants ($N = 160$) who were diverse in terms of ethnicity and age and the educational level applicable for sales and supervisory positions.

**Main findings:** On average, the job applicants responded equally positively to the cognitive ability and personality tests. The African job applicants had a statistically significantly more positive attitude towards the tests than the other groups, and candidates applying for the sales position viewed the cognitive ability tests significantly less positively than the personality test.

**Practical and managerial implications:** The choice of selection tests used in combination as well as the testing conditions that are applicable should be considered carefully as they are the factors that can potentially influence the test-taking motivation and general test-taking attitudes of job applicants.

**Contribution:** This study consolidated the research findings on the determinants of attitudinal responses to cognitive ability and personality testing and produced valuable empirical findings on job applicants' attitudes towards both test types when administered conjointly.

## Introduction

The sensible application of psychological assessment tools could play an important role in the transformation of organisations, in particular organisations in post-apartheid South Africa (Donald, Thatcher & Milner, 2014). Despite the finding that occupational assessment has the potential to provide valid and reliable performance predictions in an occupational setting, participants' perceptions may still adversely impact the results (McCarthy & Goffin, 2003). Variables, such as individuals' attitudes towards an assessment process, should be considered in order to come to an understanding of individual performance levels in assessments (Chu, Guo & Leighton, 2014). Many research studies support the notion that attitude has a profound impact on the performance of an individual in a wide variety of assessment tasks (Schmitt, 2013; Smith, 1997). Gilliland and Steiner (2012) have identified some broad implications of positive reactions to testing, for instance, positive reactions can impact significantly the attractiveness of a job and an organisation and result in positive intentions regarding the job offer.

The assessments chosen for inclusion in a selection battery may impact the job applicants' reactions to the selection process as a whole. In general, practitioners and users of psychometric tools agree that the use of a combination of different assessment types serves the purpose of giving the user a more objective view of candidates' abilities and preferences (Saville, Nyfield, McCarthy & Gibbons, 1997). Numerous studies and meta-analyses have provided evidence of the validity of cognitive and personality tests as predictors of job performance. Although personality tests have low validity compared with cognitive ability tests, evidence has shown that when these

are used in combination, personality tests have significant incremental validity (Schmitt, 2013). In addition, cognitive ability and personality tests are popular choices for inclusion in selection processes as these measures have shown remarkable validity generalisation and cost-effectiveness (Gilliland & Steiner, 2012). However, test takers' attitudes and perceptions may affect the validity of selection tools (Schmitt, 2013). Research has shown that job applicants generally evaluate cognitive ability and personality tests as less favourable than other competing selection tools (e.g. interviews and work samples) (Anderson, Salgado & Hüsheger, 2010). If users understand how job applicants from diverse backgrounds view specific assessments and what potential impact their views could have on performance, they could get to know which assessments are perceived more negatively and how this perception could potentially be rectified. Evoking positive reactions to testing during the selection process holds promise for attracting and retaining qualified employees, in particular from underrepresented or previously disadvantaged groups (De Jong & Visser, 2000; Donald et al., 2014; Muchinsky, Kriek & Schreuder, 2002).

## Research purpose

The main purpose of this study was to determine the attitudes of a diverse group of job applicants towards personality and cognitive ability tests administered conjointly in a supervised online test session as part of a selection process in a financial services company in South Africa. A secondary purpose of the study was to determine the effect of the group's demographics (representing the group's diversity) on the test-taking attitudes (TA) of the group.

In the following section, a background to TAs will be given, followed by relevant research questions that were formulated based on relevant literature that was studied.

## Literature review

### Theoretical background

The study of job applicants' attitudes towards testing forms part of a broad study field known as 'applicant reactions to tests', which entails a multitude of different theoretical perspectives. Although no single overarching theoretical framework has directed research, there has been substantial cross-referencing and integration of various models (Gilliland & Steiner, 2012; Hüsheger & Anderson, 2009).

Research on test-taking attitudinal and motivational components and their influence on test performance and test validity (Arvey, Strickland, Drauden & Martin, 1990; O'Neill, Goffin & Gellatly, 2012) is one of the recognised research streams relating to applicants' reactions to tests. Test attitude can be defined as the extent to which participants in assessments demonstrate focus, effort and diligence in completing the instrument (Arvey et al., 1990). Different aspects of TAs, such as test anxiety, motivation during tests, belief in tests, concentration and test ease during assessments, have been observed (Arvey et al., 1990).

A second well-known research stream that has a bearing on job applicants' reactions to selection practices is that of organisational justice (Gilliland, 1993). Organisational justice includes the concepts of procedural justice, interactional justice and distributive justice, which are considered central in promoting test fairness. The research issues tackled are job relatedness, test validity, equity, equality and communication about the assessment process and results (Donald et al., 2014). Gilliland's justice constructs (procedural and interactional justice) that promote test fairness have been shown to be related to test attitude constructs (e.g. motivation during tests, belief in tests) (McCarthy, Hrabluik & Jelley, 2009). Lievens, De Corte and Brysse (2003) have found that the attitudinal component known as belief in tests relates significantly to overall perceptions of the fairness of cognitive ability tests and personality tests. Research conducted by these authors shows that perceived job relatedness and test validity may positively influence test takers' belief in tests, resulting in a positive attitude.

According to Gilliland and Steiner (2012) and Nikolaou, Bauer and Truxillo (2015), social psychological theoretical models help explain reactions to tests. These models suggest that a job applicant's attitude towards a test may be influenced by the job applicant's perception of the level of congruence between his or her own identity and what the organisation stands for in terms of culture, values and beliefs. Where congruence exists with respect to valued justice principles, the applicant's attitude towards selection measures may be swayed to become more positive.

Ployhart and Harold (2004) have developed the Applicant Attribution-Reaction Theory (AART), a theory which integrates attribution theory (Weiner, 1985), the selection justice model (Gilliland, 1993) and the test attitude model (Arvey et al., 1990). The AART suggests that blatant mismatches between situational perceptions and expectations of fair treatment act as attribution triggers, leading to increased awareness of the violation of justice rules and standards of conduct in testing situations. In terms of the AART, unfavourable testing experiences may trigger a critical attitude towards tests and possibly counter-productive behavioural reactions such as withdrawal or litigation.

A fundamental assumption that applies to test attitude research is that self-interest consciously and unconsciously drives attempts to maximise the likelihood of favourable outcomes, resulting in positive or negative reactions depending on the individual's performance and the perceived fairness of the process. Testing procedures tend to be seen as more fair if they are consistent, accurate, ethical, free from bias, open to challenge and created to provide opportunity for input (Gilliland, 2008). Gilliland and Steiner (2012, p. 633) have formulated justice rules that contribute to the perceived fairness of a selection process. These rules are job relatedness, opportunity to perform, consistence of administration, reconsideration opportunity, selection information, feedback timeliness, honesty, interpersonal effectiveness of administrator, two-way communication

and propriety of questions. A detailed discussion of each of the rules in this article is not justified because of limited space; therefore, only the rules and supporting research evidence specific to standardised proctored testing of cognitive ability and personality tests will be further discussed. Meta-analytical studies have demonstrated that job applicants are inclined to react only moderately favourably to cognitive ability and personality tests but more favourably to work sample and interview selection techniques (Anderson et al., 2010). This represents a challenge as these two off-the-shelf tests (cognitive ability and personality tests) are popular choices for inclusion in a selection battery because of their generalised validity evidence for predicting performance with respect to many jobs and because of their relative cost-effectiveness (Gilliland & Steiner, 2012). Furthermore, there is a notable tendency to rate personality tests less favourably than cognitive ability tests (Anderson et al., 2010; Hausknecht, Day & Thomas, 2004). Therefore, understanding the determinants of negative or positive reactions towards personality and cognitive ability tests could be considered important as these reactions could influence TAs in specific contexts.

## Determinants of personality and cognitive ability test-taking attitudes

The 'opportunity to perform' rule of Gilliland and Steiner (2012, p. 633), which refers to the opportunity to demonstrate the required competencies within a testing and selection context, is also applicable to cognitive and personality tests. According to Hausknecht et al. (2004), opportunity to perform correlates with test-taking motivation (TM) ($r = 0.32$). For instance, question steering (ability to 'fake' a response) in personality tests may elicit positive or negative responses depending on the extent to which the applicant is able to identify the job profile requirements in the items. According to Van Vianen, Taris, Scholten and Schinkel (2004), personality tests are likely to be perceived as less fair by job applicants when the responses needed to obtain a favourable test outcome is less transparent (e.g. forced-choice-item format as opposed to a Likert format). Job applicants react favourably to tests in which their perceived and actual performance is good, and the opposite is true if they perform badly (Whitman, Kraus & Van Rooy, 2014). Positively worded warnings not to fake on tests (e.g. emphasising the advantages of responding honestly) increase test takers' motivation, whereas negative warnings (e.g. emphasising the negative outcomes of dishonesty) increase test takers' levels of anxiety, resulting in inaccurate responses (Burns, Fillipowski, Morris & Shoda, 2015). Research has shown that anxiety has a differential impact on applicants' cognitive test performance within a personnel selection context (Proost, Derous, Schreurs, Hagtvet & De Witte, 2008). Meta-analyses have shown that test performance and test anxiety are negatively related ($r = -0.31$), but causality is unclear. Surprisingly though, Lievens et al. (2003) have found that test anxiety fails to predict test fairness perceptions. However, Hausknecht et al. (2004) have found test anxiety to be related to negative TAs.

The justice rule of 'propriety of questions' formulated by Gilliland and Steiner (2012) refers to invasive, inappropriate and biased questions that infringe an applicant's privacy. This rule may be more of an issue in structured personality tests than in cognitive ability tests. Inappropriate questioning is associated with less job relatedness and produces lower justice, validity perceptions and fairness reactions, which are likely to have an impact on the applicant's belief in tests (Bauer et al., 2006; Gilliland & Steiner, 2012, p. 633). Perceptions of question invasiveness have shown to be strongly (and negatively) related to perceptions of fairness (Gilliland, 1993).

'Providing selection information and explanations' to job applicants forms part of information justice rules (Gilliland & Steiner, 2012, p. 633). This rule refers to the job relatedness of the test, the validity of the test, the procedure to be followed, the way the test will be scored and the length of time it will take, the format of the test and the expected processes and timelines for feedback (Gilliland & Steiner, 2012; Ryan & Huth, 2008). Although research findings are inconsistent (Lahuis, Perreault & Ferguson, 2003; Rolland & Steiner, 2007), Truxillo, Bodner, Bertolino, Bauer and Yonce (2009) have found that explanations affect performance in cognitive ability tests as they have a mediating effect on the motivation of the applicants taking the test. A further finding of their study is that selection information has a stronger effect on reactions to personality tests than to cognitive ability tests because of personality tests showing less job relatedness, lower transparency and controllability on the part of the applicant.

'The interpersonal effectiveness of the test administrator' is another justice rule that relates to 'the degree to which applicants are treated with warmth and respect' (Gilliland & Steiner, 2012, p. 633). Interpersonal effectiveness is a factor applicants cite often as one that makes selection processes as a whole fair or unfair. However, overall research findings demonstrate less consistent results relating to the influence of interpersonal effectiveness on test-taker reactions. This may especially be true in standardised testing situations where interpersonal contact may be limited because of the nature of the testing circumstances (Gilliland & Steiner, 2012). Although no research that has explored the differential effect of interpersonal treatment on TAs towards personality and cognitive tests could be identified, in a meta-analysis conducted by Hausknecht et al. (2004) interpersonal treatment shows a strong average effect size ($r = 0.34$) towards testing attitudes in general.

According to Zibarras and Patterson (2015, p. 333), 'job relatedness' is considered the procedural justice principle that has the greatest influence on overall fairness perceptions compared to any other characteristics of a selection method. Steiner and Gilliland (1996) argue that people implicitly judge widely used testing techniques to be valid, resulting in a favourable view of tests (belief in tests). Lievens et al. (2003) indicate a significant relation between the belief in tests and the perceived scientific value of cognitive ability tests but not

of personality tests. However, belief in tests shows a significantly positive relationship with job relatedness in personality tests. Furthermore, reactions towards cognitive ability tests containing concrete items are more positive than are reactions towards tests containing abstract items (Gilliland & Steiner, 2012).

The findings of studies about the effect of demographic variables on TAs are generally mixed (Rosse, Miller & Stecher, 1994). The effect of race on cognitive ability test performance is found to be mediated partially by motivation: a portion of the difference in the test performance of African and white people may be explained through differences in TM (Whitman et al., 2014). De Jong and Visser (2000) point out that black population groups are inclined to view personality tests as less fair than do white population groups. Rynes and Connerly (1993) have found that demographic variables are unrelated to job applicants' attitudes. Similarly, Hausknecht et al. (2004) in their meta-analytical study have found no significant relationship between applicants' perceptions of tests and personal characteristics, age, gender and ethnic background.

To date, studies have found that test takers' attitudinal reactions to a wide range of web-based administered tests are overwhelmingly positive. Online testing is no longer a novelty and many people are frequently exposed to tests on Internet portals in academic and employment settings (Anderson, 2003; Reynolds & Lin, 2003; Wiechmann & Ryan, 2003). This includes the online administration of personality and cognitive ability tests (Baron & Austin, 2000; Reynolds, Sinar & McClough, 2000). Konradt, Warszta and Ellwart (2013) point out that Gilliland's (1993) organisational justice rules for promoting positive job applicant reactions apply equally to online testing platforms. The key factors that influence job applicants' reactions to online testing are perceived to be efficiency and user-friendliness (e.g. system usability and speed), provision of information (e.g. tutorials and clear instructions), perceived process fairness (e.g. clarity about selection criteria) and the company's technological image on the Internet (i.e. job applicants' image of companies that use modern and progressive online testing systems for selection purposes).

To summarise, the theory suggests that job applicants' attitude (e.g. test anxiety, motivation during tests and belief in tests) towards cognitive ability and personality tests will most likely be affected by the perceived opportunity that the tests provide for optimal performance (Zibarras & Patterson, 2015), interpersonal effectiveness during testing (Schleicher, Venkataramani, Morgeson & Campion, 2006), explanations and selection information provided (Truxillo et al., 2009), question invasiveness (Nikolaou et al., 2015) and the efficiency and user-friendliness of an online test administration platform (Konradt et al., 2013). The favourability of testing situations may trigger a positive or negative attitude (according to attribution theory) towards tests, supported by the perceived congruence (according to social psychological models) between the applicants'

self-identity and the company's culture and values. Although research evidence generally points to a difference in job applicants' favourability rating of cognitive ability and personality tests, research carried out by Rosse et al. (1994) suggests that measures from the same category (e.g. psychological tests) applied conjointly may compensate for each other in terms of perceived relevance and fairness, resulting in job applicants reacting similarly to these measures (Rosse et al., 1994). In line with the findings of previous studies, it is argued that the experience of tests of a demographically diverse group of job applicants should affect TM and general TAs similarly irrespective of group membership. However, research findings to support this notion have been inconsistent.

The specific research questions that this study intends to answer with regard to personality and cognitive ability tests administered online under supervision as part of the relevant financial services company's selection process are the following:

- Question 1: What are the job applicants' attitudinal responses to supervised online personality and cognitive ability tests administered conjointly?
- Question 2: Are there significant differences in job applicants' attitudinal responses to supervised online personality and cognitive ability tests administered conjointly?
- Question 3: Do demographical differences (e.g. ethnic origin, gender, educational level and position applied for) relate to job applicants' attitudinal responses to supervised online personality and cognitive ability tests administered conjointly?
- Question 4: Do demographical differences (e.g. ethnic origin, gender, educational level and position applied for) relate to significant differences in job applicants' attitudinal responses to supervised online personality and cognitive ability tests administered conjointly?

The main purpose of the research was to determine the test-taking attitudinal responses of a demographically diverse sample of job applicants to personality and cognitive ability tests administered conjointly online under supervision and whether there are differences in test-taking attitudinal responses with respect to the type of test and the demographical subgroupings.

# Method
## Research approach

A non-experimental and cross-sectional quantitative survey research design was used in this study. More specifically, a descriptive and associational research approach was taken for the purposes of addressing the research questions (Gliner, Morgan & Leech, 2009). The research questions can be considered explorative in nature and current research to support clear directional hypotheses on the association between variables is lacking (Gliner et al., 2009).

## Participants

The initial sample, which was a non-probability convenience sample, consisted of 175 respondents. However, after the exclusion of incomplete data, the data of 160 respondents were retained. The final sample consisted of 68 (42%) males, 91 (57%) females and one person of unspecified gender. Equity was achieved in terms of racial distribution by including 116 (73%) African respondents, 22 (13%) respondents of mixed race, 12 (8%) white respondents and 7 (4%) Indian respondents. The races of three participants were not specified. In respect of respondents' highest educational qualifications, the data indicated that 56 (35%) respondents had completed Grade 12, 43 (27%) had post-matric certificates, 52 (31%) had degrees, 8 (6%) had postgraduate qualifications and that the qualification of one person was not specified. Age distribution data showed that 80 (50%) people were younger than 30, 75 (47%) were older than 30, whereas the age of six respondents was not specified. The distribution according to position occupied was as follows: 118 (74%) were sales consultants, 26 (16%) were team leaders and 16 (9%) were branch managers.

## Measuring instrument

In this study, a shorter and adapted version (20 items) of the Test Attitude Survey (TAS) by Smith (1997) was used as limited time was available to gather information on TAs during the proctored testing session. The original version (45 items) of the TAS was developed by Arvey et al. in 1990, which was specifically designed to assess job applicants' motivational and attitudinal dispositions towards standardised tests in selection contexts (Chu et al., 2014). As in the case of the original TAS, the current survey utilised a five-point Likert-type rating scale that ranged from 1 – Strongly Disagree to 5 – Strongly Agree (Arvey et al., 1990).

The areas included in the final survey distributed to the candidates of the current survey were based on Smith's adapted version of the TAS (Smith, 1997), namely:

- motivation (five items, e.g. doing well on the test[s] was important to me)
- lack of concentration (three items, e.g. I was bored while taking the test[s])
- belief in tests (four items, e.g. the test[s] is[are] probably a good way of selecting people for jobs)
- comparative anxiety (five items, e.g. I felt nervous when taking the test[s])
- external attribution (one item, I was ill or in a bad mood when I took the test[s])
- future effects (two items, e.g. the way I answered the test[s] should help me).

## Procedure

The study utilised secondary data obtained from a talent managment and assessment solutions organisation collected in the form of a TAS following the completion of supervised online cognitive ability and personality assessments. The assessments in this study were conducted for the purpose of selecting employees to occupy different positions at a South Africa-based financial services organisation. The complexity levels of the cognitive tests were different for different positions, but the types of assessment (verbal and numerical cognitive ability tests and a forced-choice-item–type personality questionnaire) were the same for all three positions. The process followed was highly structured and the justice rules for conditions conducive to selection and favourable test practices (Gilliland & Steiner, 2012, p. 633) were taken into due consideration. Individuals who had applied for the positions at the organisation were personally contacted and invited to be participants in the online assessment stage. The online assessments were determined through a job profiling process to ensure job relatedness. The participants were given detailed information about the process to be followed on assessment day, the venue where assessments would be completed and what would be expected of participants.

For the data collection process, trained test administrators gave participants a standardised verbal set of instructions related to the purpose of the assessments (for selection), the types of assessment to be completed for relevant positions as well as the reason for inclusion (how the assessments provided job-related information). In addition to the verbal instructions, the online assessments included detailed written instructions as well as a test tutorial that outlined the benefit of honest responses in the personality test. Participants were informed that feedback on the outcome of their assessment phase would be provided within a week of completing the assessments. The same process was followed for the completion of the survey. A verbal explanation was given of the purpose of the survey (to research participants' attitudes), written instructions were given for the completion of the survey, and participants' informed consent was obtained.

## Data analyses

The data analysis in this study was performed using the IBM Statistical Package for the Social Sciences (SPSS) Version 23. Descriptive statistics, which included frequency analyses of ethnicity, age, qualification and job roles, as well as variable descriptive statistics were provided. Confirmatory factor analysis (CFA) techniques for determining model fit were untenable in this study as only 160 candidates completed the TAS with respect to the cognitive ability and personality tests. A larger sample size was required to avoid inadequate model specification and to provide sufficient statistical power for the number of free parameters (40) that needed to be estimated (Kline, 2011). In some cases, the scales contained too few items (some consisting of only two) and consequently these scales did not reflect acceptable reliability scores. Therefore, exploratory factor analysis (EFA) using principal axis factoring (PAF) was applied to determine a more appropriate factor structure for the TAS that would appropriately represent the data. For further analyses of the TAS variables and the demographical subgroups, the analysis

of variance (ANOVA) test, *t*-test, Wilcoxon's *z*-statistic and the Kruskal–Wallis test were used for the purposes of this study.

## Ethical considerations

This study is based on a master's dissertation by the first author, which was approved by the ethics committee of the Department of Human Resources Management in the Faculty of Economic and Management Sciences at the University of Pretoria. Permission to conduct this study was obtained from the talent management and assessment solutions organisation and the financial institution in question. Participants completed an informed consent form online prior to participating in the survey. They also gave their informed consent that the survey data could be used for research and noted that participation was voluntary and anonymity was assured.

## Results

The Kaiser–Meyer–Olkin measure of sampling adequacy (KMO) and Bartlett's test of sphericity were used to determine the sample adequacy of the EFA to yield distinct and reliable factors (Field, 2009), both measures indicating the suitability of the data for use in factor analyses. The Bartlett's test of sphericity was highly significant ($p < 0.001$) and the KMO measures exceeded 0.85 for the use of the TAS with respect to both the cognitive ability and personality tests. Scree plots and Horn's parallel analysis were used to determine the number of significant factors to be retained (Field, 2009). As indicated in Figure 1, only two factors could be considered significant based on the 95% confidence interval of the inflexion point of the raw and random data's eigenvalues.

Three items were excluded that did not load significantly on any of the factors; therefore, the final version of the adapted TAS consisted of 17 items. In Table 1, the percentage variance that can be accounted for by each of the factors is presented. The total variability across both the factors was 43.96% for the cognitive ability tests and 51.81% for the personality test.

Table 2 presents the pattern matrix based on oblique rotation that contains item loadings that represent unique contributions to specific factors (Field, 2009). Oblique rotation is an appropriate rotation method if factors correlate. The factors were identified as TM (Factor 1) and general test attitude (TA) (Factor 2).

Tucker's congruence coefficient after targeted rotation was calculated to compare the pattern matrix of the TAS for the cognitive ability and personality tests (Van de Vijver & Leung, 1997). Values higher than 0.95 imply that the pattern matrices can be considered equivalent. The TAS showed factorial equivalence, which is considered important to make valid comparisons on the TAS for the respective tests. The correlation between the rotated factors was low, which represented differential validity. The correlations found were -0.261 for personality assessments and -0.234 for cognitive ability assessments.

Factor 1 accounted for the most variance in the overall scale and can be described as the attitudinal response of motivation (TM) related to the testing experience. TM factors relating to individuals' responses included the following: feeling that performing well in the assessment was important, doing well in the assessment was possible and trying one's best was important. Factor 1 also included individuals' applying high
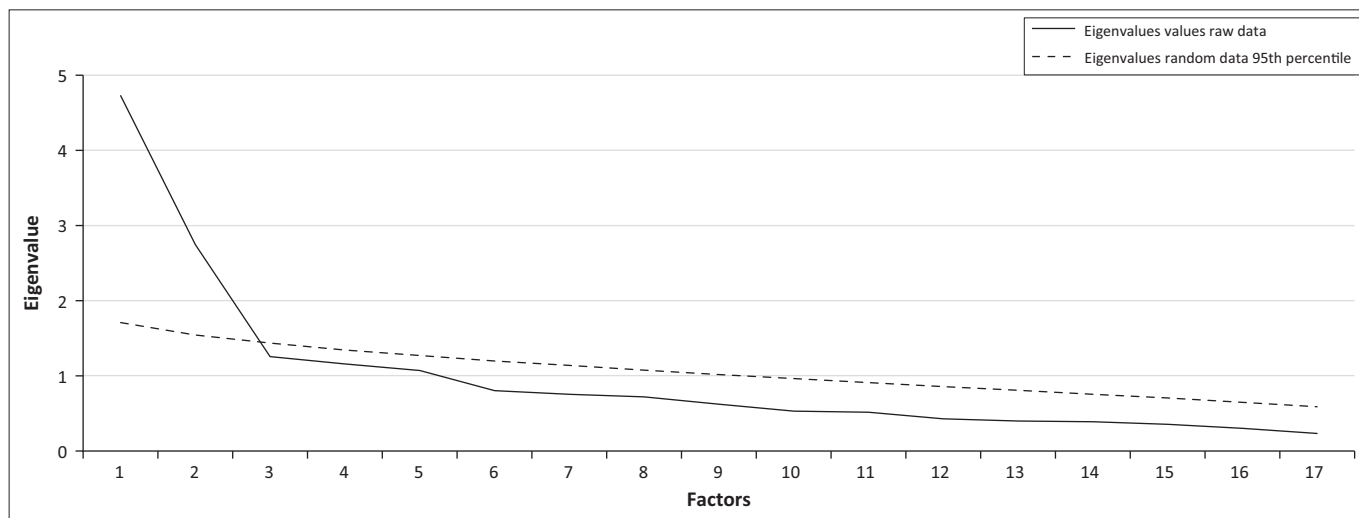


**FIGURE 1:** Scree plot and Horn's parallel test for number of significant factors to be retained on the Test Attitude Survey – an adapted version of the measure.

**TABLE 1:** Total variance of extracted factors explained for the Test Attitude Survey – an adapted version of the measure.

| Factor | Cognitive ability tests: Initial eigenvalues | | | Personality test: Initial eigenvalues | | |
|---|---|---|---|---|---|---|
| | Total | % of variance | Cumulative % | Total | % of variance | Cumulative % |
| 1 | 4.73* | 27.8 | 27.8 | 5.66* | 33.32 | 33.32 |
| 2 | 2.75* | 16.15 | 43.96 | 3.14* | 18.5 | 51.81 |

*, Significant factors (95th percentile level).

levels of concentration in doing the assessment, expecting to do well in the assessment and caring about the outcome of the assessment. It should be noted that in the original version of the TAS (Arvey et al., 1990) the motivation dimension also accounted for the most variance in the overall scale.

Factor 2 represented the attitudinal response towards the tests in general (TA), which included the following: general feelings towards the content of questions and the manifestation of nervousness during testing, levels of apathy, dissatisfaction or satisfaction with the testing experience. The second factor also included belief that the assessments reflected a person's ability to perform in an occupational setting, perceived fairness of the assessment and if such measurement tools should be used or not for selection purposes.

The reliability (Cronbach's alpha) of the TAS scales was generally of an acceptable standard (see Table 3), with reliabilities that far exceeded the coefficient of 0.60 or above that can be utilised for group comparisons (Field, 2009; Owen & Taljaard, 1996).

The skewness and kurtosis coefficients reported for the TM scale represented non-normal distributions with respect to both the cognitive ability and personality tests (skewness and kurtosis between -2 and +2 are considered acceptable for

proving normal univariate distribution) (George & Mallery, 2010). Consequently, the Shapiro–Wilk test was performed to test the normality assumption statistically and it was rejected ($p < 0.00$). The score distributions appeared to be the same for both applications of the measure. For this reason, the non-parametric alternative for the dependent $t$-test (called the Wilcoxon signed-rank test) was used to determine the statistical difference between scale scores (Field, 2009). However, the TA scale scores were normally distributed according to the Shapiro–Wilk test and the dependent $t$-test was applied.

The statistical results are further reported as per research question that was formulated earlier in the article.

*Question 1: What are the job applicants' attitudinal responses to supervised online personality and cognitive ability tests administered conjointly?* When considering the means of the TAS items presented in Table 3, it can be seen that for both the cognitive ability and personality assessments for the TM items showed a high mean score of 4.16 and 4.21, respectively (high mean scores representing a positive TA). With regard to the item means for the TA scale, indications were that both tests were experienced dominantly positively, with item means at 3.48 and 3.53 for both the tests.

*Question 2: Are there significant differences in job applicants' attitudinal responses to supervised online personality and cognitive*

**TABLE 2:** Rotated factor pattern matrix and congruence coefficients for the Test Attitude Survey – an adapted version of the measure.

| Items | Ability tests: Factor | | Personality test: Factor | |
|---|---|---|---|---|
| | 1 | 2 | 1 | 2 |
| Doing well on the test(s) was important to me (M). | 0.66[a] | 0.03 | 0.84[a] | 0.16 |
| I was bored while taking the test(s) (C). | -0.17 | 0.43[a] | -0.26 | 0.51[a] |
| The test(s) is (are) probably a good way of selecting people for jobs (B). | 0.26 | -0.42[a] | 0.28 | -0.46[a] |
| I am not good at taking test(s) (A). | -0.03 | 0.40[a] | -0.06 | 0.56[a] |
| I felt nervous when taking the test(s) (A). | 0.02 | 0.37[a] | -0.09 | 0.42[a] |
| I answered the questions of the test(s) as well as I could (M). | 0.79[a] | 0.12 | 0.88[a] | 0.12 |
| Questionnaire(s) like the test(s) should not be used (B). | 0.14 | 0.50[a] | 0.15 | 0.65[a] |
| I usually do pretty well on test(s) (A). | 0.50[a] | -0.04 | 0.60[a] | -0.09 |
| The way I answered the test(s) should help me (F). | 0.73[a] | -0.14 | 0.59[a] | -0.23 |
| I don't like answering questions like those in the test(s) (A). | 0.00 | 0.60[a] | -0.04 | 0.81[a] |
| I tried my best in the test(s) (M). | 0.84[a] | 0.15 | 0.86[a] | 0.14 |
| I concentrated well when answering the test(s) questions (C). | 0.70[a] | -0.02 | 0.75[a] | -0.08 |
| I do not believe the test(s) can show how well a person could do in the job (B). | 0.17 | 0.68[a] | 0.22 | 0.64[a] |
| I expected to do well on the test(s) (A). | 0.73[a] | -0.01 | 0.85[a] | -0.02 |
| I get tense when answering questions about myself (A). | -0.10 | 0.32[a] | -0.03 | 0.33[a] |
| The test(s) is (are) unfair to some applicants (B). | -0.04 | 0.73[a] | 0.01 | 0.75[a] |
| I just did not care how well I did on the test(s) (M). | -0.40[a] | 0.13 | -0.38[a] | 0.13 |
| **Tucker's congruence coefficient between factors** | - | - | **0.96** | **0.97** |

() represents original scale names (Arvey et al., 1990) associated with the adapted items: M, motivation; C, concentration; A, anxiety; B, belief in tests; F, future effects.
[a], represents the salient loadings (> 0.30 or < -0.30) on the respective factors.

**TABLE 3:** Descriptive and Wilcoxon's statistics of the Test Attitude Survey – an adapted version of the measure.

| Scales | $N$ | Mean | SD | Skewness | Kurtosis | Reliability α | Significance tests: a-b |
|---|---|---|---|---|---|---|---|
| Ability – Test-taking motivation | 160 | 4.16[a] | 0.93 | -2.00 | 5.40 | 0.87 | - |
| Personality – Test-taking motivation | 160 | 4.21[b] | 0.87 | -2.01 | 5.96 | 0.90 | $z = -1.29$ ($p = 0.20$) |
| Ability – Test-taking attitude[c] | 160 | 3.48[a] | 1.10 | -0.01 | -0.22 | 0.75 | - |
| Personality – Test-taking attitude[c] | 160 | 3.53[b] | 1.07 | -0.02 | -0.15 | 0.82 | $t = 1.77$ ($p = 0.078$) |

The five-point scale used to rate the items: 1, strongly disagree; 2, disagree; 3, neither disagree nor agree; 4, agree; 5, strongly agree.
[a], Test Attitude Survey scale scores for the ability test; [b], Test Attitude Survey scale scores for the personality test; [c], Note that the scales were reversed for purposes of the analysis so the direction and meaning of items and scale scores are similar for all scales.
α, Cronbach's alpha.

*ability tests administered conjointly?* The Wilcoxon's *z*-statistic and the *t*-test results presented in Table 3 showed insignificant differences between the TAS scores for each of the test types (cognitive ability and personality) with respect to which comparisons were made [TM: $z(160) = 1.29$, $p = 0.20$; TA: $t(160) = 1.77$, $p = 0.08$].

*Question 3: Do demographical differences (e.g. ethnic origin, gender, educational level and position applied for) relate to job applicants' attitudinal responses to supervised online personality and cognitive ability tests administered conjointly?* The demographic data from this study showed a significant deviation from the assumptions required for performing parametric-based statistical analysis techniques such as the ANOVA test (Field, 2009). The Kruskal–Wallis test is a non-parametric version of the one-way ANOVA test and can be used when normality assumptions are violated and when cell sizes are small ($n < 40$) and differences in cell sizes are large. The Kruskal–Wallis test (Chi-square statistic) was used to compare the total ranks between the demographic groups with respect to each of the TAS scales in this study.

With respect to each individual subscale, the Chi-square statistics showed that age did not have a significant effect on any of the TAS subscale scores for the cognitive ability tests [TM = $\chi^2(1,160) = 1.44$, $p = 0.23$; TA = $\chi^2(1,160) = 2.9$, $p = 0.09$] and the personality test [TM = $\chi^2(1,160) = 0.44$, $p = 0.51$; TA = $\chi^2(1,160) = 3.17$, $p = 0.08$].

Educational level did not have a significant effect on the TAS subscale scores for the cognitive ability tests [TM = $\chi^2(1,N=160) = 5.43$, $p = 0.07$; TA = $\chi^2(1,160) = 3.34$, $p = 0.19$] and the personality test [TM = $\chi^2(1,160) = 2.72$, $p = 0.51$; TA = $\chi^2(1,160) = 1.52$, $p = 0.47$] nor did the position applied for have a significant effect on the TAS subscale scores for the cognitive ability tests [TM= $\chi^2(1,160) = 0,17$, $p = 0.68$; TA = $\chi^2(1,160) = 0.12$, $p = 0.72$] and the personality test [TM = $\chi^2(1,160) = 0.5$, $p = 0.82$; TA = $\chi^2(1,160) = 0.39$, $p = 0.53$].

With respect to ethnic groups, the African group differed statistically significantly on all the TAS scales when compared to the composite of the remaining groups (mixed race, Indian and white). The Kruskal–Wallis test showed that the remaining groups' TAS scores did not differ significantly from each other with respect to both tests (*p*-values between 0.56 and 0.87) and, therefore, justified the grouping formed to increase the power of the comparative statistics between the composite group ($n = 40$) and the African group ($n = 116$). The African group appeared to be significantly more motivated than the rest of the group with respect to completing both the cognitive ability test [TM = $\chi^2(1,160) = 5,63$, $p = 0.02$] and the personality test [TM = $\chi^2(1,N=160) = 5.75$, $p = 0.016$] and had a significantly more positive general attitude towards both the cognitive ability test [TA = $\chi^2(1,160) = 7.16$, $p = 0.007$] and the personality test [TA = $\chi^2(1,160) = 7.73$, $p = 0.005$].

*Question 4: Do demographical differences (e.g. ethnic origin, gender, educational level and position applied for) relate to significant differences in job applicants' attitudinal responses to*

*supervised online personality and cognitive ability tests administered conjointly?* The Chi-square statistics showed that, with respect to the cognitive ability and personality tests, age did not significantly affect score differences on the two TAS subscales, namely, TM [$\chi^2(1,160) = 3.52$, $p = 0.07$] and TA [$\chi^2(1,160) = 0.575$, $p = 0.51$].

Similarly, the Chi-square statistics showed that, with respect to the cognitive ability and personality tests, educational level did not significantly affect score differences on the two TAS subscales [TM = $\chi^2(2,160) = 1.80$, $p = 0.40$; TA = $\chi^2(2,160) = 2.895$, $p = 0.206$].

Furthermore, the Chi-square statistics showed that, with respect to the cognitive ability and personality tests, ethnicity did not significantly affect score differences on the two TAS subscales [TM = $\chi^2(1,160) = 0.21$, $p = 0.65$; TA = $\chi^2(1,160) = 2.863$, $p = 0.09$].

However, the Chi-square statistics showed that, with respect to the cognitive ability and personality tests, the factor 'position applied for' had a non-significant effect on score differences on the TM subscale [$\chi^2(1,160) = 0.84$, $p = 0.36$] but a significant effect on the TA subscale [$\chi^2(1,160) = .4.759$, $p = 0.03$]. The applicants for the leadership positions (team leaders and branch managers) reacted statistically significantly more positively towards the cognitive ability test than towards the personality test, when compared to the applicants for sales positions.

## Discussion

### Outline of the results

The main purpose of the research was to determine the test-taking attitudinal responses of a diverse sample of job applicants towards a personality test and cognitive ability test administered conjointly in a supervised online test session. The job applicants showed attitudinal responses that were generally positive towards both the cognitive ability and personality tests that were used in a selection drive by a financial services company. On average, the respondents reacted positively towards both the measures in terms of TM and general TA. This is a promising finding as personality and cognitive ability tests are popular choices for inclusion in test batteries because of their generalisability of validity evidence and cost-effectiveness (Gilliland & Steiner, 2012).

The research found that the sample group did not respond significantly different to the cognitive ability test and the personality test used conjointly in the selection process. These results support the findings of Rosse et al. (1994) that the compartmentalisation of selection practices (e.g. interview, references checks, psychological tests and work sample tests) does not occur as readily within categories (e.g. psychological tests) and that tests may compensate for each other in terms of perceived relevancy and fairness, resulting in job applicants forming a heuristic evaluation of the test battery. As Hausknecht et al. (2004) have pointed out, the positive evaluation of a test battery and the forming of

positive TAs and belief in tests appear to be mostly situated in procedural justice perceptions of job relatedness, face validity and perceived predictive validity of tests. The tests used in this study had been carefully aligned to the requirements of the relevant jobs using job profiling processes to ensure job relatedness and high face validity.

In the literature, a variety of additional factors that influence TM and attitudes towards tests are identified and these include interpersonal treatment during testing (Schleicher et al., 2006), explanations and selection information (Truxillo et al., 2009), test format, question steering (ability to fake) and question invasiveness (Nikolaou et al., 2015). The TAs of the job applicants in this study may have been positively influenced as care was taken before and during the administration of the tests to adhere to Gilliland and Steiner's (2012, p. 633) version of justice rules for enhancing the perceived fairness of the selection process. With reference to the invasion of privacy theory of Bauer et al. (2006), the issue of invasiveness or propriety of questions may be more of an issue in personality tests than in cognitive ability tests and may be more salient and only important when blatantly violated (Gilliland, 2008). In terms of the AART of Ployhart and Harold (2004), favourable testing conditions (selection procedure justice) may counteract the attribution trigger, resulting in a critical stance towards individual tests. The forced-choice-item format of the personality test used in this study had the potential of eliciting negative responses as the perceived influence over the outcome of the assessment was reduced (Van Vianen et al., 2004). However, it appears that this may not have differentially skewed TAs in favour of the cognitive ability tests because of the compensatory effects of using the tests in combination (Rosse et al., 1994). Cognitive ability tests generally elicit more positive responses from job applicants because of the perceived scientific validity of these tests (Lievens et al., 2003) and the use of concrete test items instead of abstract test items (as was the case in this study) (Gilliland & Steiner, 2012). The three-option forced-choice-item format of the personality test that was applied in this study can be considered less laborious and cognitively challenging than a four-option format as far as making choices is concerned, leading to less anxiety and a more positive experience of the testing process (Vasilopoulos, Cucina, Dyomina, Morewitz & Reilly, 2006).

The research finding of Hausknecht et al. (2004) that applicants' perceptions of tests are not related to their personal characteristics (i.e. age, gender and ethnic background) is confirmed in this study with respect to all the demographic variables except ethnic group and job type. The finding of statistically significant higher TM and positive TA of the African group compared to the other ethnic groups refutes earlier findings of negative perceptions held by black groups in South Africa and abroad (De Jong & Visser, 2000; Foxcroft & Roodt, 2013; Whitman et al., 2014). The general drive of companies towards the restitution of previously disadvantaged groups and the use of tests that do not unfairly exclude any group, which are principles stipulated in the *Employment Equity Act* (Republic of South Africa, 2013), may

have raised the employment expectations of the African group and resulted in a higher TM and more positive TA. This proposition is supported by social identity theoretical perspectives suggesting that a job applicant's social identity matches a perceived organisational identity (such as culture, values and beliefs), leading to a positive expectation of the selection outcome, which is associated with high TM and a positive TA (Gilliland & Steiner, 2012; Nikolaou et al., 2015).

Compared to the job applicants applying for leadership positions, job applicants applying for the sales positions had a statistically significant more negative attitude towards the cognitive ability test than towards the personality test. The reason for this difference is not clear and needs further investigation. However, it may be argued that the more negative TA of sales position applicants may be attributable to self-serving bias formed by a negative perception of perceived performance in a test that they may have experienced as difficult (Whitman et al., 2014). Job applicants generally view personality tests as more controllable than cognitive ability tests, which may contribute to self-serving bias manifesting as a negative TA towards a cognitive ability test that is perceived as particularly difficult and consequently less valid (Van Vianen et al., 2004).

Steiner and Gilliland (1996) argue that people judge implicitly that widely used testing techniques must be valid, resulting in a favourable view of tests (belief in tests). So far, almost universally positive applicant reactions have been reported for Internet-based testing batteries, which in all likelihood has had an equally positive influence on TM and attitudes, also with respect to the motivation and attitudes of this study's job applicants as regards the personality and cognitive ability tests they completed (Anderson, 2003; Mead, 2001; Sylva & Mol, 2009).

## Practical implication

The findings of this study hold promise for the continued use of the relevant instruments in the financial services company because positive TAs have been found to relate to perceived or actual performance and the perceived fairness of the testing process, which in turn promotes positive attitudes towards the selection process and the company in general (Burns et al., 2015; Schmitt, 2013). Furthermore, the way job applicants perceive the instruments a company uses for selection purposes is advantageous for business in that it plays an important role in attracting and retaining workers from different ethnic groups, influences societal perceptions of the company's commitment to fair selection practice and reduces the likelihood of legal action instituted by unsuccessful applicants (Gilliland & Steiner, 2012; Hausknecht et al., 2004). Therefore, investing resources in ensuring that the choice of tests and the testing conditions meet the selection justice rules for perceived fairness of the selection process (Gilliland & Steiner, 2012, p. 633) may be considered a good investment that will benefit the company and broader society.

## Limitations and future directions

The most important limitations of the study were the relatively small convenience sample and the context-specific nature of the study as these have an impact on the generalisability of the findings to the broader population and other testing contexts. The design of the study was non-experimental; therefore, the impact of different test conditions resulting in differences in job applicants' TM and attitudinal reactions towards cognitive ability and personality tests were not determined. Such controls would, however, pose ethical and legal challenges in field studies as job applicants have a right to prescribed best practice testing conditions in terms of the Constitution of South Africa and this right is guarded by law and enforced by the Health Professions Council of South Africa (Foxcroft & Roodt, 2013).

It is proposed that future studies should focus on experimental research designs and simulations allowing for the systematic control of the effect of testing conditions using subjects who participate on a voluntary basis under mock testing conditions.

## Conclusion

Research on how job applicants perceive and respond to tests has gained exponential popularity in recent years as practitioners have come to realise the importance of eliciting positive applicant reactions towards selection processes. Research has shown that the choice of tests for a selection process and the test conditions that apply during the administration of the tests may influence the TAs and motivational reactions adopted by the job applicants. This study produced evidence that a diverse group of job applicants applying for positions in a South African financial services company showed the same level of positive attitudinal and motivational responses towards personality and cognitive ability selection tests used conjointly in a selection battery. This finding supports the further use of the instruments in the relevant company provided that the psychometric properties of the specified measures have been shown to be acceptable for selection purposes in the company.

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## Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

## Authors' contributions

R.V. conceptualised the study, did the initial literature review, planned and executed the empirical survey, did the initial statistical analyses and presented the findings as part of a master's degree study under supervision of the second author. R.V. also reviewed and adjusted the final draft of the article. P.S. wrote the article for publication, refined the literature review, refined the methodology and statistical analyses and presented the findings from the study.

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# A comparison of leadership styles with respect to biographical characteristics

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**Research purpose:** Managers, when applying their leadership styles, are affected by some of their own traits. This article intends to compare the leadership styles of the managers of Zabol University of Medical Sciences with respect to Hersey and Blanchard model that was based on their biographical characteristics.

**Research design, approach and method:** The research methodology is descriptive-causal and comparative. The data were collected from 300 individuals (124 female and 176 male participants).

**Main findings:** No significant difference was observed between the directive, persuasive, participative and delegative leadership styles of male and female managers. However, there was a significant difference between the mean of the directive, persuasive, participative and delegative leadership styles of managers, considering their work experience, education level and field of study.

**Research limitations:** The conservative atmosphere in university environments may affect the manager's responses to the questionnaire; therefore, in the generalisation of the results, this issue should be taken into account.

**Practical implications:** It is recommended to hold in-service courses for managers who have a lower education level or less work experience or have been graduated from the fields of study other than the Management major. It is also suggested to pay attention to the managers' fields of study and managerial experiences at the time of employment.

**Contribution:** This study enhances the quality of managers' leadership style and consequently increases the productivity in university environments.

## Introduction

Many experts in management and organisation believe that leadership style is one of the most important elements in the managers' success, which can be gradually established based on their experience, education, training and the system of values and beliefs (Hersey & Blanchard, 2005). Many experts and scholars believe that if there is to be only one factor to distinguish between successful and unsuccessful organisations, that factor will be the dynamic and effective leadership (Mirsepasi, 2005).

Considering the role of education in the progress and development of a country, organisational managers, particularly university managers, can interact with their subordinates through selecting the appropriate leadership style and recognising all the factors effective in the education process and university management. They can also provide the context for an effective implementation of plans and achievement of goals through enhancing the employees' morale and making them connected to vocational and personal objectives and motivating them to work; thereby, managers will be able to successfully accomplish educational activities and provide a desirable productivity in their employees. Evidently in organisations, where managers do not select an appropriate leadership style, there will be a conflict among the employees. The organisation's atmosphere will be tedious and employees will despise it, and consequently, the organisation's efficiency will be decreased (Khalkhali, Shakibaei & Andesh, 2011).

An effective leadership style is selected according to the different conditions, about which a capable manager should have a rich understanding in order to exploit them to their best advantage. University managers are in contact with the special people, who demand a particular type of management. In general, an individual's leadership style is defined by his or her behavioural pattern for influencing others' activities; this type of leadership is a combination of task orientation

and relationship orientation. These two types of advocating task and advocating relationship are among the main components of leadership styles (Robinson, 2010).

The importance of leadership in organisations has caused thinkers and scholars of management to attempt to discover the features and characteristics of successful managers in organisations and always try to specify the characteristics in organisations. Previous research results indicate that managers' use of different leadership styles varies considerably. In this regard, Van Engen and Willemsen (2004) and Kolaric (2005) separately presented different results about the managers' selection method for leadership styles. Their research results showed that there are different relationships between the managers' leadership styles and some of their personal traits.

Davis (2002), while studying the managers' leadership style, obtained the following results: whereas only 28.9% of managers used the evolutionary leadership style, 62.7% of educators applied the evolutionary leadership style. In addition, he realised that there is no significant relationship between the leadership style and the years of experience. Added to that, there is no meaningful relationship between the leadership style and the education level.

Gharaeini and Abbaszadeh (2009) comprehended that there is a significant difference between the leadership style of male and female managers, and male managers use the relationship-oriented style more than female managers; but the leadership styles of managers, in accordance with their education level, were identical and no significant difference was noticed.

Khaksar (2002) concluded that there is no significant relationship between the effective behaviour of managers in boys' and girls' schools. Mahboudi (2006) showed that there is a meaningful difference between the education level and the field of study of managers and their effectiveness; however, no significant difference was observed between the effectiveness of male and female managers. Sheikh Nezami (1997) conducted a study on school managers and concluded that female managers, compared to male managers, have more communication skills, but this difference was insignificant. In a study, entitled 'A comparison of the performance of managers, graduated from the Management major and the other fields, in the high schools of Mashhad city', Ziraki (1997) expressed that managers, graduated from the management and educational administrative planning majors, compared to their counterpart, have a better performance in skills such as exploiting resources, taking decisions, innovation and accountability.

Hamidi and Shoghli (2006) found that there is no significant difference between managers, graduated from the Management major and those graduated from the other fields of study, in nine main roles, including evaluation, group leadership, organisation, teachers' consultation, coordination,

administrative planning, decision making, service provision, management and supervision. Ettehadnejad (2001) concluded that from the teachers' perspective, the education level, field of study and management experience are not influential on their effective skills; however, in teachers' view, there exists a significant difference between male and female managers in the domain of professional, technical, perceptional and human effective skills (Wafa, Ramaya & Hoon, 2005). Wafa, in his study on the leaders' behaviour and the leadership effectiveness, which was carried out among the high school managers, perceived that there is a significant difference between the teachers' viewpoint about the leadership effectiveness of male and female managers; however, no significant relationship was reported between the race, field of study, and education level of managers and the managers' effectiveness. Robinson (1996) spotted a significant difference when comparing the teachers' viewpoint on the leadership effectiveness of the elementary school managers based on their age, gender and ethnicity. Jafari and Yousefnejad (2002) indicated that there is no significant difference between the leadership style of male and female managers, whereas Hyler Linda (1993) showed that there is a difference between the leadership style of male and female managers.

# Research theoretical framework
## The concept of leadership

There are different definitions for leadership, each of which clarifies an aspect of the leadership operation and process. In this article, it has been attempted to state different definitions in order to achieve a more thorough understanding. Leadership is defined as the ability to influence the group and direct it towards the intended goals. It is a source of the influencing power and has an official nature, like leaning on the bench of management. Furthermore, it is worth stating that not all leaders are managers and not all managers are leaders (Robinson, 2010). Leadership is a structured unit, consisting of the current needs. In leadership, participation is the key and the most important aspect. Moreover, identifying the weaknesses, strengths, threats and opportunities is an indispensable element for leadership. The leader gives feedbacks about his or her daily jobs and will be the pioneer, whenever necessary (Bennis, 1999).

## Leadership style

Hersey and Blanchard believe that personality and style are synonyms and in their view, one's personality or style is defined as the behavioural pattern she or he shows when directing the activities of others (Alagheband, 2006). Considering the variable nature of human behaviours in different conditions, it can be realised that the leadership style or method is variable and one single style cannot be adopted in all conditions for all institutions and organisations. Therefore, a manager's leadership style is to be related to his or her assumptions about the human's nature and the people in the organisation with whom she or he works. Every manager has some assumptions about the nature of the people around him, such as the subordinates, peers and

bosses. These assumptions consciously or unconsciously affect his or her decisions, behaviours and in general his or her style (Griffin & Moorhead, 2011).

## Hersey and Blanchard's situational theory

Situational leadership is a contingency theory, which concentrates on the followers and subordinates of a leader. The goal of this focus is related to this fact that a leader's success and effectiveness originally result from the followers, who accept or reject him or her. Regardless of what a leader does, his or her success rate depends on his or her followers' reaction. The method, presented by Hersey and Blanchard, is based on the maturity level or the readiness level of followers. In general, readiness reflects how much ability and willingness a follower has for performing a task. Hersey and Blanchard specified four stages for obtaining this readiness:

- In the first stage, individuals are neither willing, nor able to take the responsibility of performing a task.
- In the second stage, individuals are not able to perform the tasks, but they are ready and willing to take the responsibility.
- In the third stage, individuals have the ability to do the tasks, but they are not willing to do what the leader says.
- In the fourth stage, individuals have the ability and willingness to do what they are asked to do (Hersey & Blanchard, 2005).

Situational leadership applies the two dimensions, specified by Fiedler; that is, the leader's behaviour according to the focus on the task or on the employee. Hersey and Blanchard have gone further and placed each dimension in one end of the spectrum and then four special leadership styles were created by integrating them:

- Directing (more attention to work – less attention to employee): the leader defines the tasks and tells the employees how, when and where to perform what task. In this method, the instructions are much focused.
- Persuasion (more attention to work – more attention to employee): the leader continues giving instructions in order to make the individual more familiar to his or her tasks; but the leader's attention to the person him or herself has increased.
- Participation (less attention to work – more attention to employee): the leader and follower both participate in the decision-making process. The main role of the leader is to increase the pace of performing tasks and the communication speed.

Delegation (less attention to work – less attention to employee): the leader gives no instruction or directive about the task or for the sake of supporting the employees (Mirsepasi, 2005). When the followers are at a high level of readiness, the leader not only lessens his or her control on the tasks but also attempts to reconsider his or her behaviour and in other words supports the employees less than before. For example, in the first stage of readiness, the leader should give clear instructions to his or her followers, such as the instructions presented by the directive leadership style. In the second stage, the leader should pay much more attention to task and employees. By focusing more on the task, the employees' lack of readiness and ability will be compensated, and by focusing more on employees, they will also attempt to mentally compensate the leader's favours and fulfil his or her demands. In the third stage, the motivational issues are raised, which will be solved in the best way in the participative leadership style. Finally, in the fourth stage, the leader should not do much work because the followers are willing and able to take the responsibilities (Robinson, 2010).

## The necessity of the leadership style for managers

Many experts of management and organisation believe that leadership style is one of the most important elements in the success of managers, which is gradually established based on their experience, education, training and the system of values and beliefs (Hersey & Blanchard, 2005). The leadership style and the decisions taken by managers affect the organisation's performance from top to bottom. This factor leads to the organisation's success or failure because in addition to the other internal factors of the organisation's atmosphere, it also affects and controls the external factors (Khalkhali et al., 2011).

# Research methodology

The present article is a descriptive-comparative study. The data collection method is the library-field method. Statistical population of this research includes the male and female managers and employees at Zabol University of Medical Sciences. The number of managers is 52 (12 women and 40 men) and the number of employees is 1300 (537 women and 763 men). The sample size for managers is 52 individuals, determined by census; and the sample size for employees is 300 individuals including 124 females and 176 males, determined by the stratified random sampling based on the Morgan table. In order to evaluate the leadership style, 40 managers with 6 employees from their subset, and 12 managers with 5 employees from their subset were selected. In order to gather the required information, two questionnaires were used as follows:

- Demographic information questionnaire, including gender, age, education level, field of study, and work experience.
- Leadership style questionnaire: in order to evaluate the leadership style, the leadership effectiveness and adaptability description questionnaire, based on the situational leadership theory of Hersey and Blanchard, was used. The questionnaire consists of 12 questions, which measure the four leadership styles of directive, persuasive, participative and delegative. With a 4-scale ranking, this questionnaire has been set with the priorities 1–4. It is worth mentioning that the content validity of this questionnaire has been previously determined in the Iranian society with the reliability coefficient of 0.92 in Hasanian (2004) and 0.76 in Nooraee et al. (2006).

In this study, in order to confirm the reliability of the questionnaire, 25 questionnaires were distributed among the employees of Zabol University of Medical Sciences, and after collecting them, the Cronbach's alpha coefficient was obtained 0.84; therefore, the reliability of the questionnaire was confirmed. The questions and the reliability coefficient of each style in the questionnaire are presented in Table 1.

Each individual's score is calculated on the whole scale as follows: if the questionnaire scores are between 12 and 24, the application of the directive, persuasive, participative and delegative leadership styles is at a weak level; if it is between 25 and 36, it is at an average level; and if it is higher than 37, the application of the directive, persuasive, participative and delegative leadership styles is at a very high level.

# Findings

The first hypothesis:
- **Hypothesis 1:** There is a difference between the leadership style of male and female managers.

Independent *t*-test was used to study the difference between the leadership style of male and female managers. The results are presented in Table 2.

Findings of Table 2 show that no significant difference was observed between the directive, persuasive, participative and delegative leadership styles of male and female managers, at the confidence level of 95% and with the *t*-test values of 1.47, 1.04, 0.29 and 0.21, respectively ($p < 0.05$, $df = 51$).

The second hypothesis:
- **Hypothesis 2:** There is a difference between the managers' leadership style, with respect to their education level.

One-way analysis of variance was used to study the difference between the managers' leadership style with respect to their education level. The results are presented in Table 3.

According to Table 3, in the directive style, based on the findings of the one-way analysis of variance and the observed *F*, with regard to the comparison of the average scores of managers and with respect to their education level, no significant difference was observed at the confidence level of 95% ($p \leq 0.05$, $F = 1.95$). In the persuasive style, with regard to the difference in the average scores of managers, based on the findings of the one-way analysis of variance and the observed *F*, with respect to their education level, no significant difference was observed at the confidence level of 99% ($p \geq 0.01$, $F = 3.99$). The highest average was obtained by the managers holding bachelor's degrees.

Moreover, in the participative style, considering the difference in the average scores of managers, based on the findings of the one-way analysis of variance and the observed *F*, with regard to their education level, a significant difference was observed at the confidence level of 95% ($p \geq 0.05$, $F = 3.46$). The highest average was obtained by the managers with the degrees higher than the master's degree. In the delegative

**TABLE 1:** The questionnaire items and reliability coefficients.

| Styles | Question numbers | Reliability coefficient |
|---|---|---|
| Directive | Options a, Q1 to Q12 | 0.80 |
| Persuasive | Options b, Q1 to Q12 | 0.73 |
| Participative | Options c, Q1 to Q12 | 0.75 |
| Delegative | Options d, Q1 to Q12 | 0.81 |
| Total | - | 0.84 |

**TABLE 2:** Studying the difference between the leadership style of male and female managers.

| Variable | Gender | Number | Average | Standard deviation | Degree of freedom | *t*-test | Significance level |
|---|---|---|---|---|---|---|---|
| Directive | Female | 12 | 32.01 | 6.42 | 51 | 1.47 | 0.69 |
| | Male | 40 | 33.08 | 6.01 | | | |
| Persuasive | Female | 12 | 16.45 | 4.81 | 51 | 1.04 | 0.55 |
| | Male | 40 | 15.87 | 4.72 | | | |
| Participative | Female | 12 | 25.70 | 8.43 | 51 | 0.29 | 0.85 |
| | Male | 40 | 25.90 | 8.06 | | | |
| Delegative | Female | 12 | 14.11 | 6.10 | 51 | 0.21 | 0.59 |
| | Male | 40 | 14.32 | 6.44 | | | |

**TABLE 3:** Results of the one-way analysis of variance of the thinking styles, with respect to the managers' education level.

| Variables | Degree | Number | Average | Standard deviation | Degree of freedom | *F* | Significance level |
|---|---|---|---|---|---|---|---|
| Directive style | Bachelor | 23 | 32.84 | 7.02 | 2 | 1.95 | 0.06 |
| | Master | 21 | 32.04 | 5.59 | 49 | | |
| | Higher than master | 8 | 32.70 | 6.55 | | | |
| Persuasive style | Bachelor | 23 | 17.22 | 2.82 | 2 | 3.99 | 0.01 |
| | Master | 21 | 15.92 | 4.98 | 49 | | |
| | Higher than master | 8 | 16.60 | 5.04 | | | |
| Participative style | Bachelor | 23 | 12.22 | 4.37 | 2 | 3.46 | 0.02 |
| | Master | 21 | 14.23 | 7.21 | 49 | | |
| | Higher than master | 8 | 14.95 | 4.03 | | | |
| Delegative style | Bachelor | 23 | 19.40 | 5.72 | 2 | 3.81 | 0.01 |
| | Master | 21 | 24.33 | 7.33 | 49 | | |
| | Higher than master | 8 | 26.55 | 8.66 | | | |

style, considering the difference in the average scores of managers, based on the findings of the one-way analysis of variance and the observed $F$, with regard to their education level, a significant difference was observed at the confidence level of 99% ($p \geq 0.01$, $F = 3.81$). The highest average was obtained by the managers with the degrees, higher than the master's degree.

The third hypothesis:
- **Hypothesis 3:** There is a difference between the managers' leadership styles with respect to their work experience.

One-way analysis of variance was used to study the difference between the managers' leadership style with respect to their work experience. The results are presented in Table 4.

The results of Table 4 with regard to the directive style of managers indicate that there is a significant difference between the managers' average years of work experience, at the confidence level of 99% ($p < 0.01$, $F = 7.37$). The highest average score was obtained by the managers with 1–10 years of work experience. Also, a significant difference with regard to the persuasive style of managers was observed between the managers' average years of work experience, at the confidence level of 99% ($p < 0.01$, $F = 6.82$). The highest average score was obtained by the managers with 1–10 years of work experience. Regarding the participative leadership style, a significant difference was observed between the managers' average years of work experience, at the confidence level of 95% ($p < 0.05$, $F = 3.48$). The highest average score was obtained by the managers with more than 20 years of work experience. Regarding the delegative leadership style, there is also a significant difference between the managers' average years of work experience, at the confidence level

of 99% ($p < 0.01$, $F = 4.54$). The highest average score was obtained by the managers with more than 20 years of work experience.

The fourth hypothesis:
- **Hypothesis 4:** There is a difference between the managers' leadership style with respect to their field of study.

The independent $t$-test was utilised to study the difference between the managers' leadership style with respect to their field of study. The results are presented in Table 5.

As can be seen in Table 5, a significant difference was observed between the average leadership style of the managers, graduated from the Management major and the other fields, at the confidence level of 99% ($p < 0.01$, $df = 50$, $t = 3.17$). The average score of the managers, graduated from the other fields is more than that of the managers, graduated from the Management major. Moreover, a significant difference was observed between the average score of the persuasive leadership style of the managers, graduated from the Management major and from the other fields, at the confidence level of 99% ($p < 0.01$, $df = 50$, $t = 3.87$). The average score of managers from the other fields is more than that of the managers from the Management major.

A significant difference was observed between the average score of the participative leadership style of the managers, graduated from the Management major and from the other fields, at the confidence level of 99% ($p < 0.01$, $df = 50$, $t = 3.29$). The average score of managers from the Management major is more than that of the managers from the other fields. Additionally, a significant difference was observed between the average score of the delegative leadership style of the

**TABLE 4:** Results of the one-way analysis of variance of leadership styles, with respect to the managers' work experience.

| Variables | Work experience | Number | Average | Standard deviation | Degree of freedom | $F$ | Significance level |
|---|---|---|---|---|---|---|---|
| Directive | 1–10 years | 24 | 31.40 | 4.98 | 2 | 7.37 | 0.00 |
| | 11–20 years | 17 | 28.44 | 5.57 | 49 | | |
| | More than 20 years | 11 | 28.02 | 5.71 | | | |
| Persuasive | 1–10 years | 24 | 31.85 | 6.45 | 2 | 6.82 | 0.00 |
| | 11–20 years | 17 | 29.37 | 4.68 | 49 | | |
| | More than 20 years | 11 | 28.37 | 6.49 | | | |
| Participative | 1–10 years | 24 | 29.27 | 5.24 | 2 | 3.48 | 0.03 |
| | 11–20 years | 17 | 29.88 | 8.21 | 49 | | |
| | More than 20 years | 11 | 32.38 | 7.29 | | | |
| Delegative | 1–10 years | 24 | 32.34 | 6.11 | 2 | 4.54 | 0.00 |
| | 11–20 years | 17 | 32.01 | 6.18 | 49 | | |
| | More than 20 years | 11 | 34.87 | 5.99 | | | |

**TABLE 5:** Studying the difference between leadership styles, with respect to the managers' field of study.

| Variable | Field of study | Number | Average | Standard deviation | Degree of freedom | $t$-test | Significance level |
|---|---|---|---|---|---|---|---|
| Directive | Management | 22 | 30.39 | 6.05 | 51 | 3.17 | 0.00 |
| | Other majors | 30 | 33.68 | 6.65 | | | |
| Persuasive | Management | 22 | 16.16 | 4.83 | 51 | 3.87 | 0.00 |
| | Other majors | 30 | 18.23 | 4.61 | | | |
| Participative | Management | 22 | 14.64 | 6.76 | 51 | 3.29 | 0.00 |
| | Other majors | 30 | 12.16 | 4.56 | | | |
| Delegative | Management | 22 | 25.99 | 8.45 | 51 | 4.21 | 0.01 |
| | Other majors | 30 | 21.32 | 7.66 | | | |

managers, graduated from the Management major and from the other fields, at the confidence level of 99% ($p < 0.01$, $df = 50$, $t = 4.21$). The average score of managers from the Management major is more than that of the managers from the other fields.

# Discussion and conclusion

In the present study, no significant difference was observed between the directive, persuasive, participative and delegate leadership styles of male and female managers. This finding conforms to the findings of Khaksar (2002), who concluded that there is no significant difference between the effective behaviour of managers in boys' and girls' schools. It is also in agreement with the study by Mahboudi (2006), who indicated that there is no meaningful difference between the effectiveness of male and female managers. It is also in conformity with the work of Sheikh Nezami (1997), who mentioned that female managers, compared to male managers, have better communication skills, but this difference is insignificant. However, the present article conclusion does not conform to the findings of Gharaeini and Abbaszadeh (2009), who comprehended that there is a difference between the leadership style of male and female managers, and also Wafa et al. (2005), who stated that there is a significant difference between the teachers' opinions on the leadership effectiveness of male and female managers. Furthermore, the findings of the second hypothesis showed that in the directive style, no significant difference was observed between the average scores of managers, with respect to their education level. Despite this, in the persuasive style, a significant difference was observed between managers with respect to their education level. Managers with a bachelor's degree have used the persuasive style more than the other styles. Also, a significant difference was observed between the participative and delegate styles of managers with respect to their education level. The managers, with the degrees higher than the master's degree, have used the participative and delegative styles more than the other styles. These results conform to the findings of Van Engen and Willemsen (2004) and Kolaric (2005), who found that there are different relationships between the managers' leadership styles and some of their personal traits. In addition, it is in agreement with the work of Mahboudi (2006), who indicated that there is a significant difference between the managers' education level and effectiveness. The results do not conform to the results of Wafa et al. (2005) and Davis (2002), who expressed that there is no significant difference between the managers' education level and their effectiveness and leadership style.

Moreover, the findings of the third hypothesis exhibited that there is a significant difference between the managers' directive, persuasive, participative and delegative leadership styles and their years of work experience. The managers, with 1–10 years of work experience, have used the directive and persuasive styles more than the other styles. In addition, the managers with more than 20 years of work experience have used the participative and delegative styles more than the other styles. These results conform to the findings of Van Engen and Willemsen (2004) and Kolaric (2005), who indicated that there are different relationships between the managers' leadership styles and their personal traits. In addition, it is in conformity to the work of Kolagari, Modanloo and Behnampor (2007), who found that experience affects the managers' performance.

Findings of the fourth hypothesis indicated that there is a significant difference between the directive, persuasive, participative and delegative leadership styles of the managers, graduated from the Management major and those from the other fields. The managers from the other fields utilised the directive and persuasive styles more than the managers from the Management major. Most of the managers graduated from the Management major have used the participative and delegative styles more than the other styles. These results conform to the findings of Mahboudi (2006), who found that there is a significant difference between managers' field of study and effectiveness. Moreover, it is in conformity to the research of Ziraki (1997), who concluded that the managers who graduated from the Management and Planning fields of study, compared to their peer group, have a better performance in the skills for exploitation of resources, decision making, innovation and accountability. Added to that, these results do not conform to the results of Hamidi and Shoghli (2006), which shows that there iSSs no significant difference between the performance of the managers who graduated from the Management major and the managers of other fields, in nine roles of evaluation, group leadership, organisation, teachers' consultation, coordination, educational planning, decision making, service provision, management and supervision. Also, they do not conform to the findings of Ettehadnejad (2001), who concluded that in teachers' view, managers' field of study does not affect their effective skills, and also Wafa et al. (2005), who mentioned that no significant difference is observed between the managers' field of study and their effectiveness.

Given the research results, university heads are recommended to hold in-service courses for managers, who have lower education level and work experience and have been graduated from the fields of study other than the Management major. They are also recommended to pay enough attention to the managers' field of study and management background at the time of recruitment.

# Acknowledgements
## Competing interests

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# The role of big five factors on predicting job crafting propensities amongst administrative employees in a South African tertiary institution

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**Orientation:** Personality provides a foundation for understanding employee job behaviours. It determines and reflects how they respond to their work situations. There is a shortage of previous researches that have specifically dealt with the predictive role of personality on job crafting. Job crafting is also a significantly new concept in the South African work context. It has both positive and negative consequences on employee job behaviours.

**Research purpose:** The present study investigated the role of big five factors on predicting job crafting propensities amongst administrative employees in Alice, South Africa.

**Motivation for the study:** The present study aimed to determine the role of big five factors on predicting job crafting propensities amongst administrative employees. It was premised on previous research that the big five factors are associated with many employee job behaviours.

**Research approach, design and method:** The present study employed a quantitative, cross-sectional research design with a sample of 246 administrative employees in Alice, South Africa. A biographical questionnaire, a Big Five Inventory, and a job crafting questionnaire were used to collect data.

**Main findings:** The findings showed that big five factors of Conscientiousness, Extraversion, Agreeableness, Openness to experience and Neuroticism play a significant role in predicting job crafting propensities.

**Practical implications:** The present study suggests that big five factors of Conscientiousness, Extraversion, Agreeableness, Openness to experience and Neuroticism have a predictive role on job crafting behaviours. Managers of tertiary institutions can therefore consider these big five personalities to understand and predict the impacts of their job design strategies on administrative employees' behaviours.

**Contribution:** The contribution of the study was significant in that it contributed to research literature representing the influence of the big five factors in understanding job crafting propensities of employees.

## Introduction

Job crafting is still a new concept even in the South African environment (Vreugdenhil, Kooij & Van Veldhoven, 2012). Job design on the other hand is a well-researched concept in the field of human resources management. Traditionally, managers were tasked to design jobs in organisations, not always taking individual differences into consideration (Vreugdenhil *et al.*, 2012). Because of employee diversity, it remains a very difficult task for managers to develop an optimal job design to suit the specific needs of all employees (Berg, Dutton & Wrzesniewski, 2007). These challenges experienced by employees have created an urge to assume the managerial responsibilities of job designing. As a result, employees will typically engage in job crafting behaviours in order to meet their diverse competences and needs (Tims, Bakker & Derks, 2012). Job crafting is therefore a strategy employed by employees to redesign their jobs (Tims, Bakker & Derks, 2013). They proactively adjust the attributes of their jobs to optimise the balance between the features of the job and their own needs, competences and preferences (Tims *et al.*, 2013). These researchers also argued that employees create changes in their jobs for three different reasons. Firstly, they redesign their tasks because they want to be satisfied in their jobs. As such, an employee may request for different tasks that need new competences from the supervisor because he or she feels that the job is repetitive and boring. The second reason is that, employees may modify their interpersonal associations they attain when doing their work. The third one is that employees may change their

own cognitive perceptions towards their work by positively changing their perceptions towards the attributes of the job (Tims *et al.,* 2013). Researchers believe that these job changes enable employees to experience more engagement and meaningfulness in their work (Tims & Bakker, 2010).

## Problem statement

The University of Fort Hare is still in the process of organisational transformation and development. In managing the transformation processes, the University has also revitalised its organisational development department (Bell, Murugan & Nel, 2014, p. 1971). Organisational development managers are therefore, heavily involved in redesigning jobs for their employees as part of their functions in the organisation (Vreugdenhil *et al.*, 2012). And, as such, employees are passive recipients of positions they occupy (Wrzesniewski, LoBuglio, Dutton & Berg, 2013). This development has come with changes in the demands and resources needed in their jobs. However, many employee differences have not been taken into consideration by managers when designing jobs for administrative employees at Fort Hare University (Vreugdenhil *et al.*, 2012). Administrative employees represent an important professional group of employees within the university because they create a climate conducive for the organisation to function at the optimal level. Previous researchers argued that employees are all very diverse, making it difficult for the University in this instance to design jobs for every unique employee's needs (Berg *et al.*, 2007). In response to this problem, administrative employees would typically engage themselves in crafting their job tasks and responsibilities as indicated in their formal job descriptions, either by increasing or decreasing tasks, changing the type of tasks or adjusting the amount of time, effort and attention given to different tasks (Tims *et al.*, 2013). They craft their own jobs to satisfy their competences and needs (Tims *et al.*, 2012). When employees find that there is an inequity between the amount of job demands and job resources, they may be motivated to reduce this incongruence by employing four complementary strategies of job crafting. In other words, when the job does not meet employees' competences or needs, the employees may be motivated to adjust the attributes of the job (Tims *et al.*, 2012). They are more satisfied and effective when they are in positions that align well with their personal attributes. Scholars argue that job crafting is a proactive behaviour to modify the situation or employee himself or herself to attain more fit between the employees' personal attributes and the job situation (Tims *et al.*, 2013). It is about adjustments that employees make in order to achieve their person–job fit and positive work outcomes (Tims *et al.*, 2012). Scholars also argue that, because job crafting is directed towards proactively improving the work situation compared to other people, the organisation and the external environment, it has been classified under proactive person–environment fit behaviour (Tims *et al.*, 2014). Researchers argued that the big five factors are associated with different employee job behaviours (Ozer & Benet-Martinez, 2006). Big five factors provide a foundation for understanding the relationship between personality and employee job behaviours (Komarraju, Karau, Schmeck & Avdic, 2011). However, there is a scarcity of previous researches that have specifically dealt with the relationship between big five factors and job crafting. Previous studies have only focused on proactive personality, self-efficacy and self-regulation as the antecedents in job crafting (Tims & Bakker, 2010). The present study therefore proposes that the big five traits of employees have a role in either changing job demands or resources, or both of them. Research reveals that employees who craft their job resources enjoy their work more and use these positive feelings to increase their work performance (Tims, Bakker & Derks, 2014).

## Objectives of the study

The purpose of the present study was to determine the role of the big five factors on predicting job crafting propensities amongst Fort Hare University administrative employees.

## Literature review

### Theoretical perspectives

**Big five theory:** The past 30 years have seen an increase in personality research (Funder, 2001). The big five theory is a significant theory that has been extensively used in research of employee work behaviour (McCrae & Costa, 2003; Mondak, 2010; Ozer & Benet-Martinez, 2006). It has provided the most developed practical use of the big five personality factors to date (Costa & McCrae, 1992). The basis of the theory is the notion that personality can be condensed into five critical factors (Fincham & Rhodes, 2005). The big five factors are Conscientiousness, Extraversion, Agreeableness, Openness to experience and Neuroticism (Costa & McCrae, 1992). It provides a very important foundation for determining the association between personality and job behaviours (Komarraju *et al.*, 2011).

**Job Demands–Resources model:** Job attributes that need sustained energy from employees and which are linked with certain costs are called job demands. And the job attributes that add value towards achieving work-related goals, reducing the impact of job demands and associated costs and producing personal growth and development are referred to as job resources (Tims *et al.*, 2013, p. 231). According to Tims *et al.* (2013), job crafting involves making adjustments in the job description. It is, therefore, explained by using the types of job attributes offered by the Job Demands–Resources (JD-R) model (Bakker & Demerouti, 2007): job demands and job resources (Tims *et al.*, 2012). The classification enables the researchers to determine which job attributes employees adjust when they craft their jobs. Consistent with the JD-R model, job crafters change either the level of job demands, the level of job resources and/or both (Tims *et al.*, 2013, p. 231). Based on the JD–R model, scholars propose that job crafting has four conceptually different dimensions, namely: increasing structural job resources (ISTJR), decreasing hindering job demands (DHJD), increasing social job resources (ISJR) and increasing challenging job demands (ICJD) (Tims *et al.*, 2012).

**Person–job fit theory:** This theory deals with the degree at which a particular job matches employees' competences, interest and personalities (Greenberg, 2011). In this regard, an employee will be more effective to the extent that there is congruence between him or her and the job attributes. The theory suggests that the less the congruence between employees' attributes (personalities) and those required in their jobs, the more they may engage in job crafting behaviours in their organisations to achieve a person–job fit (Greenberg, 2011).

### Definitions of concepts

**Job crafting:** It is defined as the 'self-initiated change behaviours that employees engage in with the aim to align their jobs with their own preferences, motives, and passions' (Tims *et al.*, 2012, p. 173). It is perceived as a specific type of initiative work behaviour that employees engage in to modify their job tasks to suit their needs, competences and preferences (Tims *et al.*, 2013). Other scholars also perceived it as:

> the physical and cognitive modifications that employees make in the job task or interpersonal frameworks of their work which directs attention to the proactive, bottom-up strategies employed by employees to change the task, relational, and cognitive frameworks of their jobs. (Berg, Wrzesniewsk & Dutton, 2010, p. 179)

It requires the behaviours that employees engage in to modify their job tasks to promote job satisfaction, job engagement, resilience and work thriving (Berg *et al.*, 2007). The main attribute of job crafting in the work environment implies that employees initiate and carry out adjustments in their job tasks from the bottom-up, rather than managers directing changes from the top-down (Berg *et al.*, 2007). Job crafters can proactively modify the scope of their job by means of four strategies: (Tims *et al.*, 2012).

**Increasing structural job resources:** It refers to increasing resources of variety, opportunity for development and autonomy (Tims *et al.*, 2012).

**Decreasing hindering job demands:** It is the situation where employees proactively reduce or lessen their job demands when they perceive them as becoming overwhelming. They introduce initiatives to decrease their level of job demands (Tims *et al.*, 2012).

**Increasing social job resources:** It is when an employee increases the resources of social support, supervisory coaching and feedback (Tims *et al.*, 2012).

**Increasing challenging job demands:** It implies that employees develop their competences to achieve more difficult goals in order to increase personal growth and satisfaction in the job (Tims *et al.*, 2012).

**Personality**: It is defined as the:

> constellation of psychological attributes and mechanisms within an employee that are organised and relatively stable, and that

affects his or her involvement with, and adaptations to, the intrapsychic, physical, and social environments. (Larsen & Buss, 2010, p. 4)

It is a relatively unchanging integration of traits which makes an employee unique and also produces consistencies in his or her thoughts and behavioural actions (Fincham & Rhodes, 2005). It is also viewed by other scholars as the inner psychological factors that both control and reflect how an employee responds to different work situations. These inner psychological characteristics are therefore, those specific qualities, attributes, traits, factors and mannerisms that separate one employee from another (Schiffman & Kanuk, 2007). Researchers argue that personality traits may affect job behaviours because employees are actively changing their work environments (Roberts, Kuncel, Shiner, Caspi & Goldberg, 2007). Lounsbury *et al*. (2003) are of the opinion that personality is very critical in explaining variations in job behaviours.

### Conscientiousness and job crafting propensities

Conscientiousness is defined as the tendency of an employee to show self-discipline and to strive for competence and achievement (Greenberg, 2011). This dimension of personality is explained by narrow traits such as being well-organised, careful, self-disciplined, responsible and precise at the high end and being disorganised, impulsive, careless and undependable at the low end. Other scholars perceived it as a broad underlying factor that is explained by narrower traits such as obedience, persistence, impulse control, planning and organising, perfectionism and integrity (Fincham & Rhodes, 2005). Moreover, a conscientious employee has a set of emotional control that promotes responsibility and goal-directed work behaviours. There is a shortage of previous research that has linked Conscientiousness and job crafting. The attributes of a conscientious employee suggest that this type of employee may have lesser tendencies to engage in job crafting behaviours. However, this type of employee is highly engaged with the job (Schaufeli, 2013). The employee is less likely to change the job characteristics in a way that contributes towards achieving work-related goals because he or she adheres to standards set and has a strong and deeply embedded work ethic that developed during his or her childhood (Bell & Murugan, 2013). As such, a conscientious employee is less likely to change the level of job demands, job resources or both (Tims *et al.*, 2013). This type of employee may not engage in job crafting strategies like changing the set of responsibilities and tasks specified by a formal job description, by increasing or decreasing tasks, adjusting the types of tasks or changing the amount of time, effort and attention given to various tasks (Tims *et al.*, 2013). These extant arguments therefore suggest the following hypothesis:

- **Hypothesis 1:** Conscientiousness has a nonsignificant role in predicting job crafting propensities.

### Extraversion and job crafting propensities

Extraversion is defined as the propensity of a person seeking stimulation, and enjoying the association of others

(Greenburg, 2011). This dimension is explained by narrow traits such as energetic, sober, socially confident and cheerful, enthusiastic, sociable and talkative at the high end, and to retiring, reserved, silent, and cautious, self-contained, serious minded and somewhat aloof at the low end (Greenburg, 2011; Fincham & Rhodes, 2005). Scholars argue that an employee who has high Extraversion is more inclined towards positive effect and values interpersonal associations more than other employees (Matzler, Faullant, Renzl, & Leiter, 2005). Currently, there is a shortage of previous researches confirming a link between Extraversion and job crafting tendencies. However, the behavioural attributes suggest that there may be involvement on job crafting activities. For instance, because this type of employee values more interpersonal relations and has a greater energy expended on behavioural tendencies of the world (John & Srivastava, 1999), the individual may modify the job if it does not satisfy these interpersonal needs. This type of employee may therefore, employ job crafting strategies to harness the needs. As such, the employees may change how, when or the people they interact with when they perform their jobs (Berg *et al.*, 2007). These arguments therefore lead to the following hypothesis:

- **Hypothesis 2:** Extraversion has a significant role in predicting job crafting tendencies.

### Agreeableness and job crafting propensities

Agreeableness is defined as the degree to which an employee is cooperative, forgiving, compassionate, understanding and trusting (Fincham & Rhodes, 2005). It is, therefore, explained by narrow factors such as being cooperative, altruism, tender-mindedness, trust, modesty caring, sympathetic, kind and affectionate, and likeable (John & Srivastava, 1999; Mehmetoglu, 2012). Currently, there is a shortage of previous researches that have confirmed the link between this personality dimension and job crafting tendencies. However, the behavioural attributes of an agreeable employee suggest that this individual may be less likely to engage in job crafting tendencies. For instance, because the employee is cooperative, understanding and trusting, he or she may be less likely to craft their job tasks (Fincham & Rhodes, 2005). The employee may not engage in modifying the tasks and responsibilities as they are spelt out in a formal job description, by increasing or decreasing tasks, changing the type of tasks or adjusting the amount of time, effort and attention given to different tasks (Tims *et al.*, 2013). As such, the present study proposed the following hypothesis:

- **Hypothesis 3:** Agreeableness has a nonsignificant role on predicting job crafting tendencies.

### Openness to experience and job crafting propensities

Openness to experience is defined as the breadth, depth, originality and complexity of an employee's cognitive maps and experiential behaviour (John & Srivastava, 1999). It describes employees who are open to change their own perspectives and what they want from others (Mondak, 2010). Moreover, scholars also see it as an active fantasy,

aesthetic sensitivity, attentiveness to emotions and preference for diversity, intellectual curiosity and independence of judgement (Costa & McCrae, 1992). Employees with a high level of openness are attracted to both what is happening within themselves and in their external worlds. They are keen to accept novel perceptions and unusual values. Furthermore, they experience both positive and negative emotions more keenly as compared to employees who are not open (Costa & McCrae, 1992). They also show intellectual curiosity, creativity and flexible cognitive structure (Dingman, 1990). There is a shortage of previous researches that have confirmed the link between this personality dimension and job crafting tendencies. However, the behavioural attributes of an open employee suggest that the individual may be highly engaged in job crafting behaviours. For instance, because this type of employee has flexible cognitive maps and experiential tendencies, is open to one's own perspectives and has an active fantasy (John & Srivastava, 1999; Mondak, 2010; McCrae, 1992), it is highly probable to employ job crafting strategies. As such, this employee may proactively change the ways he or she perceives job tasks and relationships that compose the job (Berg *et al.*, 2007). These extant arguments therefore yield to the following hypothesis:

- **Hypothesis 4:** Openness to experience has a significant role in predicting job crafting tendencies.

### Neuroticism and job crafting propensities

Neuroticism is defined as a predisposition of an employee towards lack of positive psychological adjustment and emotional stability (John & Srivastava, 1999). It is therefore associated with instability, stress proneness, personal insecurity and depression (Mehmetoglu, 2012). Scholars argue that emotionally stable employees are not easily affected by anxiousness, nervousness, sadness and being tensed (John & Srivastava, 1999). They act after making a conscious decision about their job behaviour pattern. Poor self-regulating potency is the dispositional attribute of Neuroticism (LaRose & Eastin, 2002). There is a shortage of previous researches that have confirmed the link between this personality dimension and job crafting tendencies. However, the behavioural attributes of a neurotic or emotional unstable employee suggests that this individual is highly likely to engage in job crafting behaviours. Scholars argue that employees who are emotionally unstable sometimes modify their job task to manage their emotions (Bosnjak, Galesic & Tuten, 2007). Due to of lack of positive psychological adjustment and emotional stability, high stress proneness, personal insecurity and depression (John & Srivastava, 1999; Mehmetoglu, 2012), this employee is highly likely to engage in job crafting strategies to manage the emotional weaknesses (Bosnjak *et al.*, 2007). These extant arguments therefore lead the following hypothesis:

- **Hypothesis 5:** Neuroticism has a significant role in predicting job crafting tendencies.

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## Methods

### Research participants

A nonprobability sampling method was employed to select respondents from the population. Nonprobability sampling refers to a sampling method through which the choice of elements is not based on the statistical element of randomness (Durheim & Painter, 2006). As such, a convenience sampling technique was used. It is simply defined as the process where a researcher uses any member of the population who is available during the research process without considering their criteria (Welman, Kruger, & Mitchell, 2005). It involved selecting haphazardly those administrative employees who were easiest to obtain for the sample. The sample selection process continued until the required sample size was achieved.

The University of Fort Hare's administration has 676 administrative employees. This includes employees from the Human Resources, Finance, Registrar, Student Administration, Communications and Marketing, Examinations, Payroll, Library, Information Technology, Accommodation, Maintenance, and Institutional Support departments. Using the Raosoft sample size calculator at 5% margin of error and 95% confidence interval, the sample size for administrative employees was $N = 246$. This is the minimum recommended sample size by the Raosoft sample size calculator (Raosoft Inc, 2004). However, the researcher distributed 286 questionnaires to the subjects and 246 questionnaires were fully completed. This resulted in a 66.7% response rate. Amongst the sample group, 59.35% were female subjects and 40.65% were male subjects. With regards to age, 33.3% were in the age group 20–29; 26.83% were in the age group 30–39; 21.95% were in the age group 40–49; 15.85% were in the age group 50–59 and 2.03% were in the age group 60 and above. Also with regards to education levels, 6.91% had a high school qualification, 13.01% had a certificate, 15.45% had a diploma, 36.18% had a degree and 28.46% had a postgraduate degree. Lastly, but not least, with regards to home languages, 70.33 indicated that they were Xhosa speaking, 6.91 were speaking Zulu, 10.57 were speaking Afrikaans; 6.91 were speaking English and 5.28 were speaking Sepedi. The demographic characteristics of the participants are presented in Table 1.

### Measuring instruments

The data collection method for the present study was made up of the big five questionnaire, job crafting questionnaire and a biographical questionnaire, which was developed by the researcher. A biographical questionnaire was only used to collect some demographic information of the participants in this study. As such, this information was collected on gender, age groups, education level and home languages of the participants.

### Big five questionnaire

To assess the factors of Conscientiousness, Extraversion, Agreeableness, Openness to experience and Neuroticism, the appropriate subscales of the Big Five Inventory adopted

**TABLE 1:** Demographic characteristics of the participants.

| Variable | Participant characteristics | Frequency | % |
|---|---|---|---|
| Gender | Female | 146 | 59.35 |
| | Male | 100 | 40.65 |
| Age | 20–29 | 82 | 33.33 |
| | 30–39 | 66 | 26.83 |
| | 40–49 | 54 | 21.95 |
| | 50–59 | 39 | 15.85 |
| | 60 < | 5 | 2.03 |
| Education level | High school | 17 | 6.91 |
| | Certificate | 32 | 13.01 |
| | Diploma | 38 | 15.45 |
| | Degree | 89 | 36.18 |
| | Postgraduate degree | 70 | 28.46 |
| Home language | Xhosa | 173 | 70.33 |
| | Zulu | 17 | 6.91 |
| | Afrikaans | 26 | 10.57 |
| | English | 17 | 6.91 |
| | Sepedi | 13 | 5.28 |

$n = 246$.

from John, Donahue and Kentle (1991) were used. This is a 44-item scale that was designed to represent the sample definitions created by specialist evaluations and subsequent factor analytic authentication in assessor personality ratings (John & Srivastava, 1999). These researchers found the Cronbach's alpha coefficients for the subscales of big five factors to be 0.82, 0.88, 0.79, 0.84 and 0.81, respectively. The respondents used a 5-point Likert-type scale, which ranged from strongly disagree (1) to strongly agree (5).

### Job crafting questionnaire

To assess the extent at which employees engage in job crafting behaviours, a scale adopted from Tims *et al.* (2012) was employed. The scale has 21 items that measure the four dimensions of job crafting: ISTJR, DHJD, ISJR and ICJD. Tims *et al.* (2012) found the Cronbach's alpha coefficients for the job crafting dimensions to be 0.82, 0.79, 0.77 and 0.75, respectively. The respondents used a 5-point frequency scale, which ranged from never (1) to often (5).

### Research design

The present study employed a quantitative, cross-sectional research design with a survey research method. Quantitative research design strongly makes use of empirical analysis to make conclusions, and it enables the researcher to test hypotheses (Hair, Wolfinbarger, Ortinau & Bush, 2008). Cross-sectional research design refers to:

> a criterion groups design in which the different criterion groups are typically comprised of different age groups which are examined in terms of one or more variables at approximately the same time. (Huysamen, 1994, p. 98)

A quantitative research design was the most preferred research design because the researcher aimed to determine the predictive role of the big five factors on job crafting propensities.

## Research procedure

The permission to conduct research on the organisation's administrative employees was obtained from the human resources director. As such, an informed letter of consent and a sample of the research questionnaire were submitted to the human resources director. Furthermore, a meeting between the researchers and the human resources director was organised during which the researchers explained the objectives of the research. The researchers were granted permission to collect research data during a 1-month period. The administrative employees were asked by the researchers to participate in the research on a voluntary basis. Employees who were willing to participate in the research were given questionnaires, which included a letter to explain to the employees the purpose of the research, the procedure of participation in the research and issues of confidentiality and anonymity. They were also given an informed consent form before participating in the research. The collection of data took place over a period of a month as it was agreed with the human resources director. This gave the participants enough time to complete the questionnaires at their convenience. The completed research questionnaires were collected by the researchers.

## Statistical analysis

To analyse data, the Statistical Package for the Social Sciences (SPSS), version 21, and the Statistical Analysis Software were employed. Descriptive statistics were analysed by determining the minimum and maximum scores, standard deviations and means. The skewness was also measured to determine the symmetry of the distribution. Cronbach's alpha reliabilities were calculated to determine the internal consistency and reliability of the scales of the questionnaires. Scholars agreed that Cronbach's alpha coefficients should be greater than 0.70 in order to be considered to have an acceptable level of internal consistency (Nunnally & Bernstein, 1994).

An exploratory factor analysis (EFA) was performed to examine construct validity. Factor analysis is defined as a 'specialised statistical technique that is particularly useful for investigating construct validity' (Gregory, 2007, p. 135). Before an EFA was performed on the big five questionnaire, items 2, 6, 8, 9, 12, 18, 21, 23, 24, 27, 31, 34, 35, 37, 41 and 43 were reversed. Factor analysis was conducted on the big five questionnaire and the job crafting questionnaire to determine the underlying factors in the scales. The big five questionnaire consists of five subscales, and a job crafting questionnaire consists of four subscales. It was therefore important to assess which factors best represented data in the present study. The analysis of constructs aims to determine whether the constructs are homogeneous, which means that they are able measure one construct (Gregory, 2007).

Inferential statistics were also used to analyse data because inferences were made about the population from its sample. A standard multiple regression analysis was performed to determine whether big five factors had predictive values for job crafting. As such, the hypotheses were accepted and rejected using the multiple regression values. Pearson correlation coefficient was used to determine the relationship between the big five factors and job crafting. Practically significant relationships were measured to ascertain 'whether a relationship is large enough to be important' (Steyn, 2002, p. 10).

# Results

EFA was performed on 41 items of the BFQ and 21 items of the JCQ. EFA was preferred because the present study used a small sample of 246 and was designed to make an additive contribution to the body of knowledge on big five personality and job crafting amongst administrative employees in an institution environment. This information is important for those refining future research in these subjects areas. This is therefore an exploratory and investigative work from which tentative findings can be deducted instead of conclusive patterns. Macro-level researches should be conducted to confirm these findings before strong conclusions can be made about a South African environment at large.

A principal component analysis was performed on 44 items of the BFQ, which revealed that five factors emerged from the data (see Table 2). The factors are Conscientiousness, Extraversion, Agreeableness, Open to experience and Neuroticism. The Keizer-Meyer-Olkin value was 0.71, which exceeds the threshold value of 0.6, and the Bartlett's test of sphericity indicated a statistical significance. A five-component solution explained a total of 100% of the variance, with component one contributing 47.5%, two contributing 21.0%, three contributing 13.4%, four contributing 10.4% and five contributing 7.7% of the total variance. These factor analysis results are also consistent with the findings of John and Srivastava (1999) and Benet-Martinez and John (1998). They found that the big five factors taxonomy is similar across different types of samples.

In Table 2 for the JCQ, the results of factor analysis also showed that four factors emerged. The factors that emerged are ISTJR, DHJD, ISJR and ICJD. The Keizer-Meyer-Olkin value was 0.60, which exceeds the threshold value of 0.6, and the Bartlett's test of sphericity indicated a statistical significance. A four-component solution explained a total of 100% of the variance, with component one contributing

**TABLE 2:** Initial eigenvalues for the total variances explained.

| Questionnaire | Component | Initial Eigenvalues | | |
|---|---|---|---|---|
| | | Total | % of variance | Cumulative % |
| Big Five Inventory | 1 | 2.375 | 47.509 | 47.509 |
| | 2 | 1.051 | 21.014 | 68.523 |
| | 3 | 0.669 | 13.372 | 81.895 |
| | 4 | 0.522 | 10.445 | 92.340 |
| | 5 | 0.383 | 7.660 | 100.000 |
| Job Crafting Questionnaire | 1 | 2.221 | 55.525 | 55.525 |
| | 2 | 0.978 | 24.439 | 79.964 |
| | 3 | 0.602 | 15.047 | 95.010 |
| | 4 | 0.200 | 4.990 | 100.000 |

55.5%, two contributing 24.4%, three contributing 15.0% and four contributing 4.10% of the total variance. Tims *et al.* (2012) also found that job crafting can be measured by four factors.

Table 3 shows the descriptive statistics of the variables that were studied. The negative skewness values indicate that the distribution is negatively skewed. As such, most scores cluster around high scores on the distribution. These skewness values show that the distribution is normally distributed. Cronbach's alpha coefficients were used to test the reliability of BFQ and JCQ. According to researchers, Cronbach's alpha coefficients should be greater than or equal to 0.70 to be considered as reliable and acceptable (Nunnally & Bernstein, 1994). The Cronbach's alpha coefficients for the questionnaires and the subscales are also shown in Table 3. Cronbach's alpha reliability for the BFQ was 0.81, with a Conscientiousness dimension recording 0.77, Extraversion dimension recording 0.79, Agreeableness dimension recording 0.81, Openness to experience dimension recording 0.84 and Neuroticism dimension recording 0.83. Cronbach's alpha reliability for the JCQ was 0.87, with a ISTJR dimension recording 0.92, DHJD dimension recording 0.88, ISJR dimension recording 0.85 and ICJD dimension recording 0.83. All the Cronbach's alpha coefficients were therefore greater than a 0.70 standard acceptable.

Table 4 also shows the results of the Pearson correlation coefficient analysis. The Pearson correlation coefficient analysis was employed to determine the relationship between the big five factors (as measured by BFQ) and job crafting (as measured by JCQ). Conscientiousness was found to have a statistically and practically nonsignificant relationship with job crafting ($r = -0.05133$; $p = 0.4229$). For

the dimensions of job crafting, ISTJR ($r = 0.02593$; $p = 0.6857$), ISJR ($r = 0.15202$; $p = 0.0170$) and ICJD ($r = -0.07045$; $p = 0.2710$), Conscientiousness was found to have a statistically and practically nonsignificant relationship as well. However, with DHJD ($r = -0.23797$; $p = 0.0002$), Conscientiousness was found to have a statistically and practically significant relationship. Extraversion was also found to have a statistically and practically significant relationship with job crafting ($r = -0.29627$; $p = 0001$). For DHJD ($r = -0.45990$; $p = 0.0001$) and ISJR ($r = -0.24025$; $p = 0.0001$) dimensions, Extraversion was found to have a statistically and practically significant relationship as well. However, for ISTJR ($r = -0.04680$; $p = 0.4650$) and ICJD ($r = 0.07242$; $p = 0.2578$) dimensions, Extraversion was found to have a statistically and practically nonsignificant relationship.

Agreeableness was also found to have a statistically and practically significant relationship with job crafting ($r = -0.31456$; $p = 0001$). For DHJD ($r = -0.25730$; $p = 0.0001$), ISJR ($r = -0.42933$; $p = 0.0001$) and ICJD ($r = -0.16752$; $p = 0.0085$) dimensions, Agreeableness was found to have a statistically and practically significant relationship as well. However, for ISTJR ($r = -0.01119$; $p = 0.8614$), Agreeableness has a statistically and practically nonsignificant relationship. Openness to experience was also found to have a statistically and practically significant relationship with job crafting ($r = -0.35658$; $p = 0.0001$). For DHJD ($r = -0.25353$; $p = 0.0001$), ISJR ($r = -0.34298$; $p = 0.0001$) and ICJD ($r = -0.27132$; $p = 0.0001$) dimensions, Openness to experience was found to have a statistically and practically significant relationship. However, with ISTJR ($r = -0.14585$; $p = 0.0221$), Openness to experience has a statistically and practically nonsignificant relationship.

**TABLE 3:** Descriptive statistics and reliability statistics for the scales.

| Variable | M | SD | Min | Max | Skewness | α |
|---|---|---|---|---|---|---|
| 1. Conscientiousness | 37.03 | 4.66 | 27 | 43 | -0.49 | 0.77 |
| 2. Extraversion | 25.74 | 4.28 | 19 | 32 | -0.01 | 0.79 |
| 3. Agreeableness | 35.73 | 5.77 | 27 | 45 | 0.07 | 0.81 |
| 4. Openness to experience | 38.15 | 4.14 | 31 | 45 | 0.17 | 0.84 |
| 5. Neuroticism | 19.04 | 4.56 | 9 | 26 | -0.38 | 0.83 |
| 6. ISTJR | 19.62 | 4.29 | 5 | 25 | -1.42 | 0.92 |
| 7. DHJD | 24.35 | 4.65 | 13 | 30 | -1.06 | 0.88 |
| 8. ISJR | 18.97 | 4.00 | 10 | 25 | -1.01 | 0.85 |
| 9. ICJD | 20.83 | 2.22 | 15 | 25 | -1.01 | 0.83 |
| 10. Job crafting total | 83.76 | 10.61 | 48 | 105 | -1.48 | 0.87 |
| 11. Big five total | 155.69 | 11.98 | 138 | 190 | 1.14 | 0.81 |

M, mean; SD, standard deviation; Min, minimum; Max, maximum, α, alpha; ISTJR, increasing structural job resources; DHJD, decreasing hindering job demands; ISJR, increasing social job resources; ICJD, increasing challenging job demands.

**TABLE 4:** Correlations matrix between big five factors and job crafting variables.

| Variables | ISTJR | | DHJD | | ISJR | | ICJD | | Job crafting Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| | *r*-value | *p*-value | *r*-value | *p*-value | *r*-value | *p*-value | *r*-value | *p*-value | *r*-value | *p*-value |
| 1. Conscientiousness | 0.02593 | 0.6857 | -0.23797 | 0.0002** | 0.15202 | 0.0170 | -0.07045 | 0.2710 | -0.05133 | 0.4229 |
| 2. Extraversion | -0.04680 | 0.4650 | -0.45990 | < 0.0001** | -0.24025 | < 0.0001** | 0.07242 | 0.2578 | -0.29627 | < 0.0001** |
| 3. Agreeableness | -0.01119 | 0.8614 | -0.25730 | < 0.0001** | -0.42933 | < 0.0001** | -0.16752 | 0.0085* | -0.31456 | < 0.0001** |
| 4. Openness to experience | -0.14585 | 0.0221 | -0.25353 | < 0.0001** | -0.34298 | < 0.0001** | -0.27132 | < 0.0001** | -0.35658 | < 0.0001** |
| 5. Neuroticism | -0.00435 | 0.9459 | 0.56202 | < 0.0001** | 0.00186 | 0.9768 | 0.25881 | < 0.0001** | 0.29981 | < 0.0001** |
| 6. Big five total | -0.06409 | 0.3167 | -0.25461 | < 0.0001** | -0.35145 | < 0.0001** | -0.07763 | 0.2251 | -0.28658 | < 0.0001** |

ISTJR, increasing structural job resources; DHJD, decreasing hindering job demands; ISJR, increasing social job resources; ICJD, increasing challenging job demands.
$N = 246$;
*, $p < 0.05$, statistically significant; **, $p < 0.01$, statistically significant

In addition, Neuroticism was also found to have a statistically and practically significant relationship with job crafting ($r = 0.29981$; $p = 0.0001$). For DHJD ($r = 0.56202$; $p = 0.0001$) and ICJD ($r = 0.25881$; $p = 0.0001$) dimensions, Neuroticism was also found to have a statistically and practically significant relationship. However, for ISTJR ($r = -0.00435$; $p = 0.9459$) and ISJR ($r = 0.00186$; $p = 0.9768$) dimensions, Neuroticism has a statistically and practically nonsignificant relationship. Furthermore, total big five was found to have a statistically and practically significant relationship with job crafting ($r = -0.28658$; $p = 0.0001$). For DHJD ($r = -0.25461$; $p = 0.0001$) and ISJR ($r = -0.35145$; $p = 0.0001$) dimensions, total big five has a statistically and practically significant relationship as well. However, for ISTJR ($r = -0.06409$; $p = 0.3167$) and ICJD ($r = -0.07763$; $p = 0.2251$) dimensions, total big five has a statistically and practically nonsignificant relationship.

Table 5 shows the results of a standard multiple regression. A standard multiple regression was used to determine the extent at which the big five factors of Conscientiousness, Extraversion, Agreeableness, Openness to experiences and Neuroticism predicted job crafting. The aim was to find out the unique contributions of each factor on job crafting. As shown in Table 4, the regression model accounted for 30.6% of the variance ($R^2 = 0.306$; $F = 21.172$; $p = 0.001$). The present study found that Conscientiousness was a statistically and practically significant predictor of job crafting ($\beta = 0.299$; $t = 4.28$; $p = 0.0001$). This finding therefore implies that hypothesis 1 was rejected. Agreeableness was also found to be a statistically and practically significant predictor of job crafting ($\beta = -0.283$; $t = 4.17$; $p = 0.0001$). This finding therefore means that hypothesis 3 was supported. In addition, Openness to experience was also found to be a statistically and practically significant predictor of job crafting ($\beta = -0.305$; $t = -5.50$; $p = 0.0001$). This finding implies that hypothesis 4 was also confirmed. Furthermore, Neuroticism was also found to be a statistically and practically significant predictor of job crafting ($\beta = -0.327$; $t = 5.06$; $p = 0.0001$). This finding means that hypothesis 5 was also confirmed. However, Extraversion was found to be a statistically and practically nonsignificant predictor of job crafting ($\beta = -0.085$; $t = -1.26$; $p = 0.2106$). This finding therefore means that hypothesis 2 was rejected. The Beta weights coefficients of the big five factors also revealed that Neuroticism was the highest predictor of job crafting, followed by Openness to experience, Agreeableness, Conscientiousness, and lastly, Extraversion.

## Discussion

The purpose of the present study was to determine the role of big five factors on predicting job crafting propensities amongst Fort Hare University's administrative employees. Big five factors have been found to be associated with many job behaviours (Ozer & Benet-Martinez, 2006). They provide a very important foundation for determining the role of personality on job crafting behaviours (Komarraju *et al.*, 2011). The big five factors of personality are Conscientiousness, Extraversion, Agreeableness, Openness to experience and Neuroticism (Mehmetoglu, 2012).

The multiple regression analysis results revealed that Conscientiousness has a statistically and practically significant role on predicting job crafting propensities. Conscientious administrative employees within a tertiary institution environment engage in job crafting behaviours. This finding is uncommon because the attributes of conscientious individuals are not congruent with job crafting behaviours. Moreover, the Pearson correlation results of the present study also revealed that Conscientiousness and job crafting variables are statistically and practically nonsignificantly related. There is a shortage of previous studies that have been conducted to relate these variables. However, researchers found that conscientious individuals adhere to standards set and have a strong and deeply embedded work ethic that developed when they were still young (Bell & Murugan, 2013). As such, they are not likely to adjust their formal job descriptions to suit their needs, skills and preferences (Tims *et al.*, 2013). The findings of the present study therefore make the study an important one, and more research is needed to confirm the predictive validity of a conscientious personality on job crafting.

The multiple regression analysis results also showed that Extraversion has a statistically and practically nonsignificant role on predicting job crafting behaviours. Extraverted administrative employees within a tertiary institution environment do not engage themselves in job crafting activities. This finding is very unique because the attributes of an extraverted individual are congruent with job crafting behaviours. The Pearson correlation results of the present study also showed that Extraversion and job crafting are statistically and practically significantly associated. These findings therefore make the present study important. However, there is a shortage of previous studies that have been conducted to link Extraversion and job crafting. And more research is also needed to confirm the predictive

**TABLE 5:** Coefficients showing the relative contribution of each of the dimensions of big five factors in predicting job crafting.

| Model | Unstandardised Coefficients | | Standardised Coefficients ($\beta$) | t | Significance |
|---|---|---|---|---|---|
| | $\beta$ | Standard error | | | |
| Constant | 97.880 | 8.882 | | 11.02 | 0.0001 |
| Conscientiousness | 0.682 | 0.159 | 0.299 | 4.28 | 0.0001 |
| Extraversion | -0.212 | 0.169 | -0.085 | -1.26 | 0.2106 |
| Agreeableness | -0.521 | 0.125 | -0.283 | -4.17 | 0.0001 |
| Openness to exp. | -0.782 | 0.142 | -0.305 | -5.50 | 0.0001 |
| Neuroticism | 0.762 | 0.151 | 0.327 | 5.06 | 0.0001 |

$\beta$, Beta; $t$, $t$-test.

validity of an Extraversion personality on job crafting. Researchers found that extraverted individuals value interpersonal relations, and have greater energetic behavioural tendency towards the world (Bono, & Judge, 2004). As such, extraverted individuals are more likely to craft their jobs if they do not satisfy their interpersonal needs and competences.

The multiple regression analysis results also revealed that Agreeableness has a statistically and practically significant role on predicting job crafting propensities. Agreeable administrative employees within a tertiary institution therefore engage themselves in self-initiated change behaviours with the aim to align their jobs with their own preferences, motives and passions. The Pearson correlation results of the present study also found that Agreeableness and job crafting are statistically and practically significantly related. There is a shortage of previous studies that have been conducted to link these variables. The results of the present study also make the study a unique one. The attributes of agreeable individuals in general suggest that such individuals are not likely to engage in self-initiated change behaviours on their jobs because they are prosocial and cooperative (Fincham & Rhodes, 2005).

Furthermore, the multiple regression analysis results also showed that Open to experience has a statistically and practically significant role on predicting job crafting behaviours. Openness to experience administrative employees within a tertiary institution environment engage themselves in job crafting behaviours. The Pearson correlation results of the present study also found that Openness to experience and job crafting are statistically and practically significantly associated. There is a shortage of previous studies that have been conducted to link these variables, and this makes the findings of the present study important. However, the attributes of Openness to experience individuals are more congruent with job crafting behaviours. Such individuals have a flexible cognitive map and experiential tendencies, are open to their own perspectives and have an active imagination power (Mondak, 2010). As such, they could change their job tasks and responsibilities prescribed in their job formal descriptions to satisfy their own needs, competences and preferences (Tims *et al.*, 2013). More researches are needed in the South African environment to confirm the predictive validity of Openness to experience on job crafting behaviour.

Lastly, the multiple regression analysis results also indicated that Neuroticism has a statistically and practically significant role on predicting job crafting propensities. Neurotic or unstable administrative employees within an institution craft their jobs tasks and responsibilities. The Pearson correlation results of the present study also showed that Neuroticism and job crafting are statistically and practically significantly related. There is a shortage of previous studies that have been conducted to link these variables, and this makes the subject areas worthy of more research. However, the attributes of

neurotic or unstable individuals are more congruent with job crafting behaviours. Such individuals lack positive psychological adjustment and emotional stability (Greenberg, 2011). They have a high level of instability, stress proneness, personal insecurity and depression (Mehmetoglu, 2012). As such, they could engage in job crafting strategies to manage their emotional weaknesses (Berg *et al.*, 2007; Bosnjak *et al.*, 2007). More researches are also needed to confirm the predictive validity of Neuroticism on job crafting.

## Practical implications

The present study suggests that having knowledge of the predictive role of the big five factors on job crafting may help managers of tertiary institutions to understand the impact of their job design interventions on administrative employees. Employees engage in job crafting in response to the ways in which their jobs have been designed for them by managers (Tims *et al.*, 2012). The present study may therefore help managers to understand the informal job-related behaviours that administrative employees within a tertiary institution environment engage themselves in as they attempt to achieve a more optimal job functionality (Wrzesniewski *et al.*, 2013). This study found that administrative employees within a tertiary institution environment with a conscientious, agreeable, open to experience or neurotic personality engage themselves in job crafting behaviours. As such, they increase structural job resources, decrease hindering job demands, increase social job resources and increase challenging job demands.

Because this study and other previous studies have confirmed that employees engage in job crafting behaviours, this study suggests that managers of tertiary institutions should involve administrative employees when designing their jobs. They should employ participative management strategies to allow administrative employees to contribute to their job designs. Such strategies may enable managers to bridge the differences between their preferences as managers and the administrative employees' preferences. The present study also suggests that managers of tertiary institutions may formalise job crafting because it improves the well-being of employees. This may be achieved when employees are allowed craft their job demands and resources (Tims *et al.*, 2011).

## Limitations of the study

Several limitations need to be considered when the results of the present study are interpreted. Firstly, the sample used was confined to a relatively small group of an institution's administrative employees. This therefore limits the application of the research results to the populations of different organisations. Testing the variables on different organisations may help to make strong conclusions about the predictive validity of big five factors on job crafting. Secondly, the present study employed self-reported questionnaires to collect data. This means that participants may have responded to the questionnaires in a socially desirable manner and may therefore not have given accurate responses that reflected

themselves and their real situations about themselves. Thirdly, the present study used a nonprobability convenience sampling method, which also limits the generalisability of results to other organisations. Finally, the cross-sectional nature of the present study limits the nature of data obtained to a specific period of time.

## Recommendations for future research

The present study recommends that longitudinal studies should be conducted to elicit better information about the predictive role of big five factors on job crafting over time. There is a shortage of previous studies that have been conducted to link the variables under study. However, previous studies have only focused on proactive personality, self-efficacy and self-regulation as the antecedents on job crafting (Tims & Bakker, 2010). The present study found that Conscientiousness and Agreeableness predicted job crafting behaviours, but the attributes of these factors are not congruent with job crafting behaviours. Also, the study found that Extraversion was a nonsignificant predictor of job crafting behaviours, but the attributes of extraverted individuals are more congruent with job crafting behaviours. The present study therefore needs to be replicated by future researchers to confirm its research findings. Macro-scale studies should be conducted in multisites to allow the findings to be generalised beyond the population of the present study.

# Conclusion

Notwithstanding the weakness of the research design, the findings of the present study contribute new ideas into the theoretical knowledge of job crafting. It also provides empirical evidence in support of big five factors as the predictors of job crafting, as the previous researchers have highlighted that they are associated with many job behaviours (Ozer & Benet-Martinez, 2006). This therefore further supports a proposition by a person–job fit theory that the less the congruence between employees' attributes of Conscientiousness, Extraversion, Agreeableness, Openness to experience and Neuroticism and those required in their jobs, the greater the propensities for them to engage themselves in job crafting behaviours in their organisations to achieve a person–job fit (Greenberg, 2011). It is also expected that the present study will stimulate more researches on the predictive validity of big five personalities on job crafting propensities.

# Acknowledgements

## Competing interests

The authors declare that they have no financial or personal relationships which may have inappropriately influenced them in writing this article.

## Authors' contributions

C.B. was the leader of the project. As such, he was responsible for designing the research methodology, analysing the research data, writing the subject content of the paper, and editing the paper with regards to content, structure, and language. N.N. was responsible for data collection and its procedures that needed to be followed. She also edited the referencing of the paper. Furthermore, she was also responsible for editing editor's final comments.

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# Career adaptability and employee engagement of adults employed in an insurance company

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**Orientation:** As a resiliency resource, career adaptability relates to an individual's ability to adapt to new work demands and is seen to impact various occupational outcomes such as engagement.

**Research purpose**: The aim of the study was to determine the relationship dynamics between career adaptability (measured by Career Adapt-Abilities Scale) and employee engagement (measured by Utrecht Work Engagement Scale).

**Motivation for the study:** As a personal resource, career adaptability enables employees to deal with job demands, facilitating employee engagement. Limited research exists on the impact of career adaptability variables on employee engagement, bearing significant relevance in the current workforce.

**Research design, approach and method:** A quantitative survey was conducted with a convenience sample ($N = 131$) of employees in an insurance company within South Africa.

**Main findings/results:** Significant positive relationships were found between career adaptability and employee engagement. The results suggest that participants who have experienced higher employee engagement have better developed career adaptability skills.

**Practical implications:** Managers and human resource practitioners need to recognise how people's career adaptability influences their level of engagement in the organisation.

**Contribution:** This research is the first to investigate the construct of career adaptability in an insurance company and the findings add to the existing career literature and provide valuable information that can be used to inform career development and engagement strategies.

## Introduction

### Key focus of the study

In the current era of more diverse, global and boundary-less careers (Biemann, Zacher & Feldman, 2012; Briscoe, Hall & Frautschy DeMuth, 2006; Sullivan & Arthur, 2006), employee's ability to adapt to new work demands, diverse groups and different environments is becoming increasingly important. For organisations, this means that every effort should be made to remain relevant in this environment (Klehe, Zikic, Van Vianen & De Pater, 2011). This includes refocusing attention to attracting, retaining, engaging and developing key employees (Coetzee, Bergh & Schreuder, 2010). For employees, the changes in the world of work imply significant changes to the nature and complexity of their careers and their job demands (Coetzee & Schreuder, 2009; Klehe *et al.*, 2011).

The present study focused on the career adaptability variables that enable the individual to proactively adapt to the changing career circumstance and the way in which these attributes influence their engagement to the organisation. By identifying the relationship between these variables, recommendations can be made to enhance human resources practices, such as to inform engagement strategies, as well as in the career development setting.

The climate in the insurance industry has similarly reflected global changes (Coetzer & Rothmann, 2007). Since the 19th century, the insurance industry has seen immense growth and expansion, characterised by competitiveness and rivalry (Coetzer & Rothmann, 2007). These changes, along with world-wide economic conditions and demands, have forced organisations

into rapid adaptation, including down-sizing, restructuring and outsourcing (Coetzer & Rothmann, 2007).

From a human resources perspective today, employee engagement continues to be an important consideration. Because of the challenging economic climate, organisations now more than ever are deciding to restructure and resize, which has resulted in organisations investigating new approaches to maintain and increase engagement. Organisations need to strike the right balance between fostering and enhancing employee engagement levels whilst at the same time not compromising their competitive position (Knight, 2011).

The ability to attract, engage, develop and retain talent will become increasingly important for gaining competitive advantage. In the new economy, competition is global, capital is abundant, ideas are developed quickly and cheaply and people are willing to change jobs often (Sundaray, 2011). Organisations that do not provide good treatment for their employees will lose their talented people. In this situation, engaged employees may be a key to competitive advantage because, engaged employees have high levels of energy, are enthusiastic about their work and are often fully immersed in their jobs so that time flies (Macey & Schneider, 2008; May, Gilson & Harter, 2004).

Employee engagement is seen as a function of working conditions, specifically the job demands, job resources and the control that the employee has over his work (Bakker, 2011; Schaufeli & Bakker, 2004). It is also a function of personal resources; therefore, career adaptability may influence engagement, as suggested by career adaptability and engagement models (Rossier, Zecca, Stauffer, Maggiori & Dauwalder, 2012). Research on employee engagement has predominantly focused on the organisational factors that may influence it, whilst individual influence factors have not received sufficient attention (Rothmann & Joubert, 2007). Little to no research has studied the relationship between career adaptability and their impact on employee engagement in an insurance environment.

## Background to the study

The contemporary workplace witnesses a decrease in stability and security in careers (Ferreira, 2012). The emergence of protean and boundary-less careers implies an erosion of a career with a single employer and involves frequent career changes (Lent, 2013) that, in turn, require greater levels of career adaptability (Savickas, 2011). Career adaptability is an adaptive resource enabling individuals to cope with career traumas and transitions in stressful and uncertain times (Ferreira, 2012).

As a resiliency resource, career adaptability relates to positive behaviour and the individual's ability to adapt with greater ease to stress and uncertainty in the work environment (Harry & Coetzee, 2013). Individuals with high levels of career adaptability are generally both cognitively and emotionally

more ready to cope with more predicable tasks of preparing for and participating in the work role and with the unpredictable adjustments prompted by changes in work and working roles (Savickas & Porfeli, 2012).

Career adaptability is seen to impact various occupational outcomes, including job success, job satisfaction, tenure and engagement (Klehe *et al.*, 2011). It enables employees to deal with changes in their work environment, such as redundancy, restructuring, outsourcing and job insecurity, all characteristics of the current business environment (Klehe *et al.*, 2011). Specific skills encapsulating adaptability, such as coping skills and self-regulation, relate to outcomes like engagement (Savickas, 1997). Lower levels of career adaptability are associated with employees who have lower engagement (Rossier *et al.*, 2012).

Regardless of the job demands and increased pressures of the work environment, some employees do not reach a point of burnout, but rather thrive on the pressure, finding pleasure in hard work and effectively dealing with high job demands (Schaufeli & Bakker, 2001). Employee engagement is a positive, gratifying, work-related state of mind that is characterised by vigour, dedication and absorption (Pitt-Catsouphes & Matz-Costa, 2008). It is further described as the meaning that employees find in their work and the discretionary effort and time devoted to work (Pitt-Catsouphes & Matz-Costa, 2008).

Increased employee engagement may benefit employers and employees alike (Pitt-Catsouphes & Matz-Costa, 2008). Engaged workers are less likely to be stressed, more satisfied with their personal lives and more productive. Engaged workers would probably stay longer in an organisation than less engaged counterparts would (Pitt-Catsouphes & Matz-Costa, 2008). For the employer, an engaged workforce displays higher productivity, innovation, increased profitability, stronger client relationships and longevity within the organisation (Pitt-Catsouphes & Matz-Costa, 2008).

Individual variables, such as adaptability, have been relatively absent in literature in relation to employee engagement. It is important to acknowledge that both organisational variables and individual factors influence employee engagement (Rothmann & Joubert, 2007). As a personal resource, career adaptability may influence employee engagement, as evident in the career adaptability and engagement models (Bakker, 2011).

## Trends from the literature

### Career adaptability

According to Ferreira (2012), adaptability is a predisposition to consciously maintain an integration of person and the environment and constitutes the attitudes, competencies and behaviours that individuals use to fit into different professions. Career adaptability relates to the professional duties, traumas, events, situations and transitions that individuals find themselves having to deal with, as well as the psychosocial strategies needed to cope (Savickas & Porfeli, 2012).

In the career construction theory, adaptability resources help to inform the strategies that individuals use to direct their adaptive behaviours (Stoltz, 2014). Individuals need to self-regulate in order to accommodate employment-related change and to also acknowledge that change can be driven by individuals seeking new challenges or wishing to adopt new perspectives associated with engagement in substantive personal development (Brown, Bimrose, Barnes & Hughes, 2012).

Career adaptability, as a personal resource, relates specifically to the agency of the employees to manage their own careers, make career decisions and have the confidence to adapt to changing work environments (Bakker, 2011). Savickas (1997) proposes career adaptability as a bridging construct that entwines the career life stages and essentially connects all perspectives of the career or lifespan theory. In reaction to the changing world of work, regulation skills and adaptation abilities, adaptability is regarded as critical for individuals to respond to and face the challenges associated with constantly changing work contexts (Savickas & Porfeli, 2012).

Career adaptability can be defined as the individual's readiness responses and coping resources, which are used by individuals to plan for, explore and inform decisions regarding the future possibilities of their careers (Rossier *et al.*, 2012). Career adaptability reflects a process through which people build their professional lives in a dynamic manner and at the same time demonstrate the ability to handle changes both proactively and effectively with regard to the particular sociocultural and socioeconomic context within which they live (Coetzee, 2008; Ferreira, 2012).

Adapting proactively to a changing career circumstance reflects the ability to handle constructively the stress of a new or challenging career context (Hirschi, 2012). It is the readiness of the individual to cope with predictable tasks, such as planning, preparing and participating in work, as well as unpredictable demands of the organisation, such as changes in work and career (Klehe *et al.*, 2011). In achieving this, career behaviours, such as exploration and planning, are seen as complementary (Super, Savickas & Super, 1996; Savickas, 1997, 2005).

The four dimensions of career adaptability resources are concern, control, curiosity and confidence. These dimensions are used by individuals to support self-regulation strategies (Savickas & Porfeli, 2012). Career concern consists of the ability of an individual to be aware of and plan for a vocational future. It involves a tendency to consider life within a time perspective anchored in hope and optimism (Stoltz, 2014). Control relates to the responsibility of individuals to shape themselves as well as the environment and to face challenges with effort, persistence and self-discipline (Savickas & Porfeli, 2012). Career control rests on the belief that it is an advantage for people to be able not to only use self-regulation strategies but also to exert some sort of influence over the context (Stoltz, 2014).

Curiosity encourages individuals to explore alternatives of themselves and their environment and to see themselves in different roles (Savickas & Porfeli, 2012). Curiosity about possible selves increases people's active exploration behaviours. To explore information builds confidence in individuals to actualise their decisions and implement these in their life designs. Career confidence is the self-confidence in one's ability to face and to solve concrete vocational and career problems. Even in the face of obstacles and barriers, individuals with career confidence are able to stand by their own aspirations and objectives.

An adaptable individual in the face of change is therefore seen as concerned about their future, takes control of preparing for it, explores alternatives through their curiosity and pursues aspirations through established confidence (Savickas & Porfeli, 2012). Individuals with high levels of career adaptability generally take a proactive stance towards managing their personal life and promoting their own well-being (Lent, 2013).

There appears to be a paucity of research on the career adaptability in an insurance industry. According to Savickas and Porfeli (2012), adaptability is the coping responses or behaviours necessary for an individual to handle the career change tasks with which individuals may be faced. Broadly speaking, adaptability reflects the ability to adjust to change, especially in unpredictable situations like in insurance companies.

The resources or dimensions of career adaptability enable individuals to adjust their behaviours to the changing needs and demands of the environment and are mediating factors of job demands and job resources. Therefore, career adaptability is also associated with employee engagement (Bakker, 2011; Schaufeli & Bakker, 2004). Career adaptability is therefore an important construct to consider in this study as it relates to employee engagement. Career adaptability contributes to factors such as work engagement, job satisfaction, career success, a stronger connection and a fit with the organisation and a stronger sense of responsibility towards the organisation (Ferreira, 2012; Savickas & Porfeli, 2012; Zacher, 2014). Organisations that develop career adaptability will most likely promote the management of engagement strategies.

### Employee engagement

Employee engagement implies that the individual feels strongly involved and connected to their work, invests more discretionary effort in their work and is focused and concentrated on the work they are involved in (Rossier *et al.*, 2012). It is further viewed as a function of working conditions as well as the personal control that the individual has over their work (Rossier *et al.*, 2012; Schaufeli & Bakker, 2004).

Employee engagement has been linked to job satisfaction, organisational commitment, personal initiative, prosocial behaviour, motivation and life satisfaction (Vecina, Chacon, Sueiro & Barron, 2012). Employee engagement appears to be

dependent on job and personal resources (Bakker, Schaufeli, Leiter & Taris, 2008). Job resources represent the characteristics of the job that are functional in obtaining career-related objectives, whereas personal resources are associated with resiliency and positive self-evaluations that enable individuals to control and influence their environment (Demerouti, Bakker, Nachreiner & Schaufeli, 2001; Hobfoll, Johnson, Ennis & Jackson, 2003; Tremblay & Messervay, 2011).

Truss *et al*. (2006) define employee engagement as a 'passion for work', which encompasses the physical, cognitive and emotional components. According to Kahn (1990), employee engagement is the result of being psychologically present when occupying and performing an organisational role. Kahn (1990) suggests that engagement is a multidimensional construct where employees can be emotionally engaged, physically engaged and cognitively engaged. Engaged employees become physically involved in their tasks, are cognitively alert and emotionally connected to their jobs and hide their true identity (Coetzee & De Villiers, 2010; Olivier & Rothmann, 2007).

Schaufeli and Bakker (2004) consider employee engagement to be a positive, fulfilling, work-related state of mind, characterised by vigour, dedication and absorption. Engagement does not refer to monetary and specific state but rather a more persistent and pervasive affective-cognitive state that is not focused on any particular object, event individual or behaviour (Schaufeli & Bakker, 2004). The following dimensions are considered relevant for employee engagement:

- Vigour refers to the willingness to invest effort, low fatigue, high levels of energy and resilience and persistence in the face of difficulties (Bakker, 2011; Schaufeli & Bakker, 2003). Vigour also refers to employee's resilience when working (Bakker, 2011).
- Dedication refers to the sense of significance the individual derives from doing their job, a feeling of pride and enthusiasm about work, feeling challenged and inspired at work. Individuals with high dedication strongly identify with their work and experience it as meaningful, challenging and inspiring (Bakker, 2011; Schaufeli & Bakker, 2003).
- Absorption indicates the feeling of being totally and happily immersed in work, often finding it difficult to detach from work (Bakker, 2011; Schaufeli & Bakker, 2003). Employees with high absorption are happily engrossed in their work and fully concentrate on the task at hand (Bakker, 2011).

HR practitioners face a major ongoing challenge to enhance productivity in the workplace and must constantly strive to find ways of encouraging employees to be more committed to their employer and to increase the levels of employee engagement in the organisation. Sartain and Finney (2003) maintain that the reality is that HR needs to identify innovative and creative behaviours to build a dynamic, lively, exciting and profitable workplace where employees will love their jobs.

Those organisations that are not able to positively engage their employees in their work and in the organisation's values and objectives will not be able to realise their full potential. Investing in the conditions that foster employee engagement is vital for the growth and profitability of the organisation (Chughtai & Buckley, 2008).

## The relationship between career adaptability and employee engagement

The various definitions of employee engagement imply that employees put energy into their work, feel involved in their work and concentrate on the task at hand (Bakker & Demerouti, 2008). Consequently, employee engagement can be viewed as a function of work conditions. This relates more specifically to the job demands, job resources available to the employee as well as the extent to which an individual has control over his work and career (Schaufeli & Bakker, 2004).

Guided by the job demands-resources model (JD-R), it is further proposed that employee engagement is a function of personal resources, such as intrapersonal resources of career adaptability, self-efficacy, optimism and career management (Bakker, 2011; Cotter & Fouad, 2012). Therefore, career adaptability may influence employee engagement (Bakker, 2011; Cotter & Fouad, 2012).

Very little research has focused on occupational guidance variables and employee engagement, especially in a work-to-work transition context (Rossier *et al.*, 2012). According to Cotter and Fouad (2012), few studies have taken into account personal strengths, such as career adaptability, when examining employee engagement. Previous studies have found links between career adaptability and positive outcomes, such as life satisfaction (Hirschi, 2009) as well as negative work-related outcomes, such as turnover intentions (Ito & Brotheridge, 2005).

In terms of decision-making, exploration, confidence, planning and increased career adaptability have been seen to assist in the successful mastery of vocational transitions promoting well-being and decreasing distress (Hirschi, 2009). Van den Heuvel, Demerouti, Bakker and Schaufeli (2013) view career adaptability as a crucial personal resource that enables employees to respond to the changing world of work and consequently career transitions. Career adaptability is further seen as one of the most important factors to ensure commitment and motivation of employees amidst increased environmental pressure, thus ensuring organisational success (Savickas & Porfeli, 2012; Van den Heuvel *et al.*, 2013).

In their study of retrenched employees, Cotter and Fouad (2012) found no relationship between career adaptability and employee engagement despite the anticipated theoretical relationship. Contradictory to these findings, Rossier *et al.* (2012) found significant relationships between the two variables. Therefore, understanding the relationship between career adaptability and employee engagement is increasingly relevant and important. Career adaptability may predict process-oriented constructs, such as performance, as well
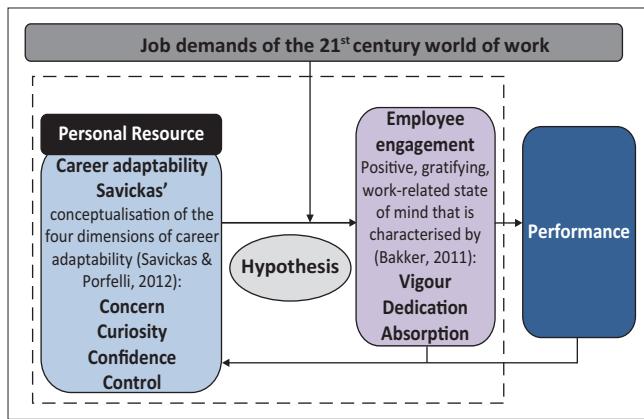
Source: Adapted from Bakker, A.B., & Demerouti, E. (2008). Towards a model of work engagement. *Career Development International, 13*(3), 218

**FIGURE 1:** Theoretical relationship between career adaptability and employee engagement.

**TABLE 1:** Characteristics and biographical distribution of the sample.

| Characteristics of sample | Groups | Number of respondents | Percentage of respondents |
|---|---|---|---|
| Gender | Male | 36 | 27.48 |
| | Female | 95 | 72.52 |
| Age | < 20 years | 0 | 0 |
| | 20–25 years | 9 | 6.87 |
| | 26–30 years | 24 | 18.32 |
| | 31–35 years | 32 | 24.43 |
| | 36–40 years | 28 | 21.37 |
| | 41–45 years | 18 | 13.74 |
| | 46–50 years | 9 | 6.87 |
| Race | Black people | 30 | 22.9 |
| | Mixed-race people | 10 | 7.63 |
| | Indian people | 16 | 12.21 |
| | White people | 75 | 57.25 |
| Tenure | 1 year | 11 | 8.4 |
| | 2 years | 9 | 6.87 |
| | 3 years | 12 | 9.16 |
| | 4 years | 22 | 16.79 |
| | 5 years | 16 | 12.21 |
| | 6 years | 10 | 7.63 |
| | 7 years | 6 | 4.58 |
| | 8 years | 4 | 3.05 |
| | 9 years | 3 | 2.29 |
| | 10 years | 7 | 5.34 |
| | 11–15 years | 17 | 12.98 |
| | 16–20 years | 7 | 5.34 |
| | > 20 years | 7 | 5.34 |

as occupational behaviours, such as engagement (Rossier *et al.*, 2012).

Figure 1 illustrates the theoretical relationship between career adaptability and employee engagement:

- **Hypothesis 1 (H₁):** Career adaptability is significantly related to people's level of employee engagement.

## Research objective

The present study aimed at empirically assessing whether career adaptability positively relates to employee engagement. The assessment of whether career adaptability is related to employee engagement may provide valuable information for human resource managers and practitioners to inform career development interventions and engagement strategies within organisations.

The next section of the article elaborates on the research design, which covers the research approach and method, followed by the presentation of the results and a discussion of the findings. The article concludes with a brief synopsis of the main conclusions, implications for practice and recommendations for potential future research.

## Research design

### Research approach

For this exploratory study, a quantitative survey design was used to achieve the research objective.

### Research method

#### Participants

The participants were a convenience sample of 131 employed adults within a financial institution (see Table 1).

#### Measuring instruments

Participants completed the Utrecht Work Engagement Scale (UWES) (Schaufeli & Bakker, 2003) and the Career Adapt-Abilities Scale (CAAS) (Maree, 2012).

The UWES is a self-rating questionnaire developed by Schaufeli and Bakker (2003), which measures three subscales of engagement, namely vigour, dedication and absorption. It comprises 17 items which include statements such as 'I am bursting with energy every day in my work' (vigour); 'My job inspires me' (dedication); and 'Time flies when I am at work' (absorption).

Respondents respond to items on a 7-point rating scale, indicating frequency of feelings and experiences relative to work, varying from never (0) to always (6) (Rossier *et al.*, 2012; Schaufeli, Bakker & Salanova, 2006). The UWES is scored by calculating the score obtained per question based on the response (7-point scale) per dimension (Schaufeli & Bakker, 2003).

The Cronbach's Alpha values of the UWES were also highly satisfactory with all scores between 0.80 and 0.91. The overall internal consistency of the UWES was high, at 0.94, indicating good reliability of the instrument.

The CAAS (International Form) consists of 24 items which the respondents rate on a scale from 1 (not strong) to 5 (strongest). The questionnaire includes items such as 'Preparing for the future' and 'Considering the consequences of my actions'. These items are divided equally to measure the four dimensions of career adaptability, namely concern, control, curiosity and confidence (Maree, 2012).

For this study, each of the subscales on the CAAS reflected adequately high Cronbach's Alpha values and displayed

high internal reliability (0.85–0.93). The CAAS had an overall Cronbach's Alpha value of 0.96, which indicates high internal reliability of the instrument.

### Research procedure

Ethical clearance and permission to conduct the research were obtained from the University of South Africa and the participating organisation. Participants consented to voluntarily complete an electronic questionnaire of the UWES as well as the CAAS. Questionnaires were sent to participants via an electronic survey tool, accompanied by a covering letter explaining the purpose and voluntary nature of the research as well as confidentiality of information. Informed consent from participants was obtained by explaining the purpose of the study, confidentiality of data as well as the purposes for which the data will be used in a compulsory section to be completed in the electronic survey. Participants were not able to continue with the questionnaire if they have not given explicit informed consent.

### Statistical analysis

A cross-sectional study (measuring all variables at a certain point in time) was employed to investigate the relationship between career adaptability and employee engagement. Descriptive and inferential statistics were used to analyse the data. Pearson's product–moment correlations were performed to test the research hypothesis.

## Results

Means, standard deviations and internal reliability for the variables of interest are shown in Table 2.

Table 2 shows the average mean score of the CAAS as $M = 41.93$; SD = 6.10. The highest means score obtained was on the curiosity subscale ($M = 43.51$; SD = 6.93), whilst control presented the lowest scores ($M = 39.51$; SD = 6.64).

Furthermore, Table 2 shows that the UWES had an average mean score of $M = 25.97$ and standard deviation of SD = 5.44. All subscales obtained similar mean scores, with the highest on the dedication scale ($M = 27.81$; SD = 5.96) and the lowest on both vigour and absorption ($M = 27.10$; SD = 5.71).

**TABLE 2:** Descriptive statistics: Career Adapt-Abilities Scale and Utrecht Work Engagement Scale.

| Description | Mean | Standard deviation | Cronbach's alpha coefficients (a) |
|---|---|---|---|
| Career adaptability | 41.93 | 6.1 | 0.96 |
| Concern | 41.44 | 6.57 | 0.88 |
| Control | 39.51 | 6.64 | 0.85 |
| Curiosity | 43.51 | 6.93 | 0.93 |
| Confidence | 43.24 | 7.41 | 0.9 |
| Employee engagement | 25.97 | 5.44 | 0.94 |
| Vigour | 27.1 | 5.71 | 0.8 |
| Dedication | 27.81 | 5.96 | 0.89 |
| Absorption | 27.1 | 5.71 | 0.91 |

CAAS, Career Adapt-Abilities Scale; UWES, Utrecht Work Engagement Scale.

### Hypothesis testing

The primary aim of the study was to empirically assess whether career adaptability relates to employee engagement. $H_1$ was analysed by performing Pearson's product–moment correlations. $H_1$ proposed that career adaptability (CAAS variables) would be significantly related to employee engagement (UWES variables).

### Correlational statistics

The relationship between the variables was calculated by means of Pearson's product–moment correlations. Pearson's product–moment correlations allowed the researcher to identify the direction and strength of the relationship between each of the variables. As shown in Table 3, employee engagement correlated significantly with career adaptability ($r = 0.404$; $p \leq 0.01$) with medium practical effect size, indicating a strong positive relationship between the two constructs. Employee engagement also correlated positively with all the career adaptability variables with the exception of absorption. The correlations vary from $r = 0.22$ ($p \leq 0.05$) to $r = 0.476$ ($p \leq 0.01$).

The highest correlation was found between employee engagement and confidence as a dimension of career adaptability ($r = 0.458$; $p \leq 0.01$), indicating a significant positive relationship of medium practical effect size. Practical significant relationships were also established between employee engagement and both control ($r = 0.365$; $p \leq 0.01$) and curiosity ($r = 0.333$; $p \leq 0.01$) of medium effect size. A moderate relationship between concern and employee engagement was established ($r = 0.272$; $p \leq 0.05$; small practical effect size).

Confidence revealed the highest correlations with all dimensions of employee engagement, with vigour $r = 0.476$; $p \leq 0.01$; medium practical effect size, dedication on $r = 0.427$; $p \leq 0.01$; medium practical effect size and absorption $r = 0.371$; $p \leq 0.01$; medium practical effect size.

Overall, vigour had the strongest relationship with all dimensions of career adaptability. Career adaptability showed the weakest correlation with absorption ($r = 0.288$; $p \leq 0.05$; small practical effect size).

Overall, absorption yielded the weakest correlations with all dimensions, with correlations with curiosity significant on the 0.05 level ($r = 0.220$; $p \leq 0.05$; small practical effect size). Absorption and concern yielded no significant relationship ($r = 0.160$; $p \leq 0.05$; small practical effect size).

Based on the statistical results, $H_1$ (career adaptability is significantly related to people's level of employee engagement) is accepted.

## Discussion

This study explored the relationship between career adaptability and employee engagement. The correlational

**TABLE 3:** Pearson's product–moment correlations: Career Adapt-Abilities Scale and Utrecht Work Engagement Scale.

| Variable | Analysis | Vigour | Dedication | Total employee engagement |
|---|---|---|---|---|
| Concern | Pearson correlation | 0.295+ | 0.300++ | 0.160+ |
| | Significance (2-tailed) | 0.001† | 0.001† | 0.067 |
| | *N* | 131 | 131 | 131 |
| Control | Pearson correlation | 0.397++ | 0.348++ | 0.269+ |
| | Significance (2-tailed) | 0.000† | 0.000† | 0.002† |
| | *N* | 131 | 131 | 131 |
| Curiosity | Pearson correlation | 0.349++ | 0.357++ | 0.220+ |
| | Significance (2-tailed) | 0.000† | 0.000† | 0.012‡ |
| | *N* | 131 | 131 | 131 |
| Confidence | Pearson correlation | 0.476++ | 0.427++ | 0.371++ |
| | Significance (2-tailed) | 0.000† | 0.000† | 0.000† |
| | *N* | 131 | 131 | 131 |
| Total Career Adaptability | Pearson correlation | 0.429++ | 0.405++ | 0.288+ |
| | Significance (2-tailed) | 0.000† | 0.000† | 0.001† |
| | *N* | 131 | 131 | 131 |

CAAS, Career Adapt-Abilities Scale; UWES, Utrecht Work Engagement Scale.

+, $r \leq 0.29$ (small practical effect size); ++, $r \geq 0.30 \leq 0.49$ (medium practical effect size); †, Correlation is significant at the 0.01 level (2 tailed); ‡, Correlation is significant at the 0.05 level (2 tailed).

analyses indicated a number of significant relationships between the variables that provide valuable pointers about the relationship between the variables of concern of the present study.

Overall, the results suggest that participants who have experienced higher employee engagement have better developed career adaptability skills. This relationship is in line with the theoretical relationship expected to exist between the constructs, as reported by previous research (Bakker, 2011; Cotter & Fouad, 2012; Hirschi, 2009; Ito & Brotheridge, 2005; Rossier *et al.*, 2012; Van den Heuvel *et al.*, 2013).

The results indicated that respondents had experienced higher employee engagement when they were more concerned about their careers, had a sense of control over their careers, were curious about their careers and had confidence in their ability to manage their careers. These findings are consistent with similar findings by Rossier *et al.* (2012) in a Swiss sample where career adaptability was found to have a significant impact on employee engagement, mediating the relationship between intrinsic dispositions and work-related outcomes. The findings are supported by Savickas and Porfeli (2012) who state that the dimensions of career adaptability are utilised to support employees' self-regulation strategies. Consequently, career adaptability can be linked to positive organisational outcomes, such as employee engagement, as proposed by Hirschi (2009).

Confidence had the most significant meaningful relationship with employee engagement. This means that the extent to which individuals feel they are able to implement and actualise their choices and have the confidence to deal with their career-related changes (Savickas & Porfeli, 2012) is likely to lead to increased engagement. Control (the ability of individuals to own their future) is seen to influence engagement significantly. Control enables employees to take charge of their future, to shape themselves and the environment and to meet changes head-on through effort, discipline and persistence (Savickas & Porfeli, 2012).

Employee engagement is further seen to be influenced by the extent to which individuals' direct energy towards exploring possibilities, their future selves and possible scenarios (Savickas & Porfeli, 2012). To a lesser extent, the findings indicate that engagement is influenced by the individual's concern for the future, planning ahead and looking ahead to what may come next (Savickas & Porfeli, 2012).

The four adaptability resources call for individuals to be concerned about their future, take control over preparing for their future, explore different future scenarios and strengthen their confidence to pursue their careers (Savickas & Porfeli, 2012). In relation to the initial definitions of employee engagement that were proposed, engagement is seen to be the meaning that individuals find in their work and the discretionary effort invested in work (Pitt-Catsouphes & Matz-Costa, 2008). It is seen as the energy that employees apply to their work, the feeling of being involved in their work and the focus which they have on the task at hand (Bakker & Demerouti, 2008; Rossier *et al.*, 2012).

Based on the findings discussed above as well as the aforementioned definitions of employee engagement, it is clear that the ability of individuals to adapt their careers to a changing work environment may well translate into discretionary effort and energy invested in their work, which is likely to influence employee engagement (Bakker & Demerouti, 2008; Rossier *et al.*, 2012).

These findings are consistent with similar research which has found that increased career adaptability has assisted in the successful mastery of vocational transitions which, in turn, promote well-being and decrease distress (Hirschi, 2009). The findings also support the view that career adaptability is one of the most important factors to ensure commitment and motivation of employees amidst increased environmental pressure, thus ensuring organisational success (Savickas & Porfeli, 2012; Van den Heuvel *et al.*, 2013).

# Conclusion

## Implications for practice

The findings of this study have implications for managers and human resource practitioners who are responsible for providing career development and engagement interventions. It can be concluded that there is a significant positive relationship between the four dimensions of career adaptability, namely concern, confidence, curiosity and control, and employee engagement.

These findings contribute to the body of knowledge regarding the relationship between career adaptability variables and employee engagement, which have not been greatly explored in an insurance environment. The research also adds to the existing body of knowledge on employee engagement and engagement models. In terms of the JD-R model, career adaptability, as a personal resource, is discussed as another intrapersonal resource that enables employees to deal with the demands of their jobs, in turn fostering engagement and a high-performing workforce. This adds another dimension to existing literature on personal resources within this engagement model.

In practice, this research emphasised the significance of career adaptability in the 21st century world of work, which enables employees to deal with the changes and environmental pressures that they face. In practice, facilitating career adaptability skills can be seen to equip and enable individuals to deal with the changing world of work, whilst simultaneously fostering employee engagement within the organisation. Human resources and career development practitioners should ensure that career adaptability skills of employees employed in the insurance company are enhanced so that they can continue to be engaged.

The conclusions derived from these findings indicate that practitioners can benefit greatly from understanding the relationship between career adaptability and employee engagement in order to inform career development and engagement interventions in insurance companies. Career development interventions should focus on developing career adaptability skills to enhance engagement levels.

## Methodological limitations and for future directions in research

The sample was also drawn from a specific industry only. This reduces the power of this study and the potential to generalise the results to the diverse South African population. Given the exploratory nature of the research design, this study cannot yield any statements about causation. Associations between the variables have therefore been interpreted rather than established. By expanding the population group from which the sample is drawn to other regions within South Africa and different divisions within the organisation, more generalisable results and conclusions about the relationship between career adaptability and employee engagement can be rendered.

# Acknowledgements

## Competing interests

## Authors' contributions

R.T. supervised the research, assisted with the writing up of the article and submitted the article for publication. M.v.d.M. was responsible for data collection and assisted with the literature review.

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# Beneficiary contact moderates relationship between authentic leadership and engagement

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**Orientation:** Beneficiary contact moderates the relationship between authentic leadership and work engagement.

**Research purpose:** The objective of this study was to examine the moderating effect of the breadth, depth and frequency of employee interaction with the beneficiaries of their work on the positive impact of authentic leadership on work engagement.

**Motivation for the study:** Investigating the boundary conditions of the relationship between leaders and followers is vital to enhance the positive effect of leadership. Authentic leadership has not previously been examined with respect to beneficiary contact as a specific situational factor. The researchers therefore set out to ascertain whether beneficiary contact has a strengthening or weakening effect on the impact of authentic leadership on work engagement.

**Research design, approach and method:** The researchers administered the Authentic Leadership Questionnaire (ALQ), the Utrecht Work Engagement Scale (UWES-9) and Grant's scale on Beneficiary Contact.

**Main findings:** The findings showed that beneficiary contact had a weakening effect on the positive relationship between authentic leadership and work engagement.

**Practical/managerial implications:** Ideally, organisations create environments conducive to work engagement in which leadership plays an important role. This study found that one factor in the work environment, namely beneficiary contact, might have an adverse effect on the positive relationship that authentic leadership has on work engagement. Leaders should therefore take organisational contextual realities into account, such as regular, intense interaction of employees with the beneficiaries of their work. This situation could create strain for individual employees, requiring additional organisational support.

**Contribution/value-add:** Organisations need to recognise the impact of beneficiary contact on the relationship between authentic leadership and work engagement. The researchers propose further studies on the influence of contextual variables on the relationship between leaders and followers.

## Introduction

Authentic leadership has a positive impact on followers, particularly when it comes to work engagement (Avolio & Gardner, 2005; Ilies, Morgeson & Nahrgang, 2005). Leader-follower relationships, however, are not cultivated in a vacuum (Porter & McLaughlin, 2006). Investigating the conditions of the relationship is therefore vital to understanding how to enhance the effect of authentic leadership in the work environment. In this regard, Cooper, Scandura and Schriesheim (2005) as well as Gardner, Cogliser, Davis and Dickens (2011) encourage research into the role of moderators in the relationship between authentic leadership and followers' attitudes and performance. This is in line with contingency theories (House, 1971) which suggest that leaders need to adjust to situational factors. Investigating the impact of individual situational factors in the work environment is instrumental in increasing the effectiveness of leadership practices. Authentic leadership has been examined quite extensively with regard to situational leadership factors. It has not, however, been investigated with regard to beneficiary contact, or the extent to which employees are exposed to interaction with the beneficiaries or customers, of their work outputs. Grant (2012) recommends research into whether beneficiary contact has a moderating role in leadership styles other than transformational leadership. In Grant's studies, the effect of transformational leadership on employees' performance was strengthened through beneficiary contact (Grant, 2012). In contrast, other studies on interaction with beneficiaries reveal that emotionally intense exchanges could lead to negative consequences, like strain and ultimately

burnout (Grant & Parker, 2009). This study therefore focused on ascertaining if beneficiary contact has a strengthening or weakening impact.

Another key construct in this study was employee engagement as it increases employee performance (Anitha, 2014; Salanova, Agut & Peiró, 2005) and results in several other positive outcomes (Burke & El-Kot, 2010), such as profitability, customer satisfaction and loyalty (Gallup, Inc., 2013; Harter, Hayes & Schmidt, 2002) and organisational citizenship behaviour (Rich, Lepine & Crawford, 2010) and results in competitive advantage for the organisation (Shuck, Reio & Rocco, 2011). Work engagement, rather than performance, was selected for this study because of this wider scope of benefits. Although increasing levels of engagement is beneficial for organisations, studies have shown worldwide engagement levels to be low (Gallup, Inc., 2013; Towers Watson, 2012).

Organisations need to invest in leadership development (Avolio, Reichard, Hannah, Walumbwa & Chan, 2009; Avolio, Walumbwa & Weber, 2009; George, 2003) because of the negative impact of destructive leadership (Padilla, Hogan & Kaiser, 2007). Most studies revolve around the leader-member exchange (Yukl, O'Donnell & Taber, 2009), yet leader-follower relationships are embedded within organisational contexts (Pawar & Eastman, 1997) that can be conducive or detrimental to effective leadership (Padilla *et al.*, 2007). Porter and McLaughlin (2006) ask whether:

> researchers adequately investigate the relationship between organisational context components and leadership? Or, like with the weather, many are talking about it, but few are doing much about it, insofar as empirical research is concerned. (Porter & McLaughlin, 2006, p. 559)

Avolio (2007) also promotes a change in the focus of leadership development and research, from individual leaders' characteristics to leadership as a complex social dynamic construct. Lord and Hall warned as far back as 1992 against research on complex issues of leadership using simple bivariate correlations. Researchers have established that organisational factors influence positive leadership specifically, leading to an inclusive, strength-based climate (Gardner, Avolio, Luthans, May & Walumbwa, 2005; Gardner, Cogliser, Davis & Dickens, 2011) or organisational structure (Porter & McLaughlin, 2006) and context also influences charismatic leadership (Shamir & Howell, 1999). In 1991 Tosi advised researchers in 'The Leadership Quarterly' to focus leadership research on the organisation as context for leadership theory and Bass reiterated this in 1999 (Bass, 1999). Porter and McLaughlin (2006) proclaimed a resounding 'yes' to the question of whether research was neglecting the organisation as the context for leadership. They reported that only 16% of 373 peer-reviewed articles had taken the organisational context into account. Koene, Vogelaar and Soeters (2002, p. 194) warned that, 'There is a lack of empirical information on the moderating effect of the organisational context on leadership effectiveness'. Although Walter and Bruch's (2010) research did emphasise

that organisational design choices, like centralisation in decision-making, create conditions for the emergence of transformational leadership behaviour, most leadership studies that investigate moderators examine task interdependence, task competence and task complexity (Day, Gronn & Salas, 2004). Uhl-Bien, Marion and McKelvey (2007) emphasises that leadership is embedded in a complex interplay of numerous interacting forces and warns not to underestimate the complexity of the context in which organisations must function and adapt. Against the background of these recent findings, this study opted to investigate a particular contextual dynamic, namely the moderating effect of employees' exposure to the people affected by their work (in other words, their beneficiaries). Interestingly, in a number of studies, beneficiary contact increased persistence behaviour (Belle, 2012; Grant, 2007). Parker and Axtell (2001) find beneficiary contact results in stronger commitments and, in their later studies, a greater tendency to take the customer's perspective (Axtell, Parker, Holman & Totterdell, 2007). An alternative view, the emotional labour and burnout perspective, shows negative outcomes of beneficiary contact, such as strain, stress and burnout (Grandley & Diamond, 2010; Grant & Parker, 2009).

## Purpose

Against this background the purpose of this research was to answer the research question: 'what is the strengthening or weakening (moderating) effect of beneficiary contact on the impact of authentic leadership on work engagement?'

## Literature review

### Authentic leadership

Authenticity involves both owning one's personal experiences and acting in accordance with one's true self (Gardner *et al.*, 2005; Leroy, Palanski & Simons, 2012). Interest in authentic leadership emanated from a proposition that transformational leaders are pseudo versus authentic (Bass & Steidlmeier, 1999). Pseudo transformational leaders can be branded as immoral, whereas authentic transformational leaders 'expand the domain of effective freedom, the horizon of conscience and the scope for altruistic intention' (Bass & Steidlmeier, 1999, p. 211). Authentic leaders are, however, not necessarily transformational leaders, 'the key distinction is that authentic leaders are anchored by their own deep sense of self, they know where they stand on important issues, values and beliefs' (Avolio & Gardner, 2005, p. 329). In this study, four subconstructs of authentic leadership were investigated. The first was balanced processing, that refers to:

> listening to multiple sources and stakeholders before making a decision; second, internalised moral perspective refers to being guided by internal moral standards that are used to self-regulate one's behaviour; third, relational transparency refers to presenting one's authentic self through openly sharing information and feelings as appropriate for situations; and fourth, self-awareness refers to demonstrated understanding of one's strengths, weaknesses and the way one makes sense of the world. (Avolio, Walumba & Weber, 2009, p. 424)

Research has shown evidence of a positive relationship between authentic leadership and work engagement, and that investment in developing authentic leaders is therefore essential (Avolio, Gardner, Walumbwa, Luthans & May, 2004; Gardner *et al.*, 2011; Hassan & Ahmed, 2011; Ilies *et al.*, 2005; Shamir & Eilam, 2005). This research study formulated the following hypothesis to determine whether the data of this study supports the outcomes of previous studies:

- **Hypothesis 1:** Authentic leadership has a linear relationship with work engagement.

## Work engagement

Engagement is an important focus of the research into positive psychology (Schaufeli, Bakker & Salanova, 2006; Seligman & Csikszentmihalyi, 2000). Four major strands of engagement research have emerged concerning personal engagement, burnout, employees with an energetic connection and employee perceptions. The first, personal engagement, relates to individuals who 'employ and express themselves physically, cognitively and emotionally' (Kahn, 1990, p. 694). Later researchers confirmed Kahn's study and that psychological meaningfulness or employees experiencing a return on investment of their work performance were an important condition for personal engagement (Simpson, 2009). The original burnout to engagement scale of Maslach, Jackson and Leiter (1996) suggests that engagement lies at the opposite end of the scale to burnout (Demerouti, Mostert & Bakker, 2010; Maslach, Leiter & Jackson, 2012). The third strand involves work engagement, where 'employees have an energetic connection with their work and employee engagement' (Schaufeli *et al.*, 2006, p. 702) and the fourth, employee engagement, involves measures of employee perceptions of work characteristics (Attridge, 2009; Harter *et al.*, 2002; Saks, 2006). In this study, the researchers focused on the third strand of engagement, namely work engagement. Scholars such as Llorens, Bakker, Schaufeli and Salanova (2006) established work engagement, for example, as a mediator of the relationship between the job resources available to employees and their organisational commitment, whereas van den Heuvel, Demerouti, Bakker and Schaufeli (2013) and Xanthopoulou Bakker, Demerouti and Schaufeli (2012) also emphasised the role of contextual and personal job resources. Other scholars paid attention to identifying the organisational antecedent conditions that result in engagement. These findings focus managerial efforts on fostering engagement in the workplace. A number of scholars investigated the influence of job resources and job demands (Bakker & Demerouti, 2007) but came up with conflicting findings (Crawford, LePine & Rich, 2010). Another organisational factor was suggested by Grant (2007). He identified a relationship between the level of engagement that employees experience towards their work and the extent to which they were exposed to the beneficiaries of their work. The researchers therefore included this variable in their study:

- **Hypothesis 2:** Beneficiary contact has a moderating effect on the impact of authentic leadership on the individual

constructs of work engagement, (1) vigour, (2) dedication and (3) absorption.

## Beneficiary contact

Beneficiary contact is:

> the degree to which jobs and tasks are relationally structured to provide employees with opportunities for exposure to and interactions with the living, breathing human beings affected by their work. (Grant, 2007, p. 398)

It allows employees to see their organisation's goal being achieved when they serve the beneficiaries of their work (Grant *et al.*, 2007) and it greatly enhances their persistence, output, productivity and vigilance (Belle, 2012). In job design research, the capacity of beneficiary contact to enhance employee motivation has received extensive recognition (Grant *et al.*, 2007). Three empirically distinct dimensions of the contact with beneficiaries were investigated in this study, namely contact frequency, breadth and depth. Contact frequency:

> represents how often the job provides opportunities to regularly interact with beneficiaries, second, contact breadth – the degree to which the job provides opportunities to interact with a variety of different beneficiaries, and third, contact depth is the degree to which the job provides opportunities for meaningful interactions with beneficiaries. (Grant, 2008, p. 22)

The researchers, therefore, formulated the following hypothesis:

- **Hypothesis 3:** The individual constructs, (1) frequency, (2) breadth and (3) depth of beneficiary contact have a strengthening effect on the impact of authentic leadership on work engagement.

Two competing perspectives on beneficiary contact have emerged in recent literature. The first is the emotional labour and burnout (EL) perspective, which holds that frequent, direct, emotionally intense interactions with clients, customers and patients are likely to cause strain, stress and burnout (Bennett & Barkensjo, 2005; Grant & Parker, 2009). A vast array of negative personal impacts is likely to involve unpleasant contact and internal conflict (Grandley & Diamond, 2010; Grandley, Kern & Frone, 2007). The second, the relational job design perspective, argues that:

> when jobs are structured to provide employees with contact with beneficiaries, employees can empathise, identify with and take the perspective of beneficiaries and thereby develop stronger affective commitments to them. (Grant & Parker, 2009)

The more frequent the communication, the lower the role ambiguity and the higher the perceived task significance (Humphrey, Nahrgang & Morgeson, 2007). Given these research findings and Grant's studies revealing the strengthening effect of beneficiary contact on the impact of transformational leadership on employees' performance (Grant, 2012), the researchers proposed that the relationship between authentic leadership and employee engagement would be strengthened by beneficiary contact.

# Method

## Research approach

This study examined causal relationships between the independent variable, authentic leadership; the moderator, beneficiary contact; and the dependent variable, work engagement. Original survey data was required on these constructs (Saunders & Lewis, 2012). The researchers chose existing questionnaires to ensure validity of the measures.

## Measures

### Research participants

The target population and unit of analysis of the study included all full-time employees in specific business units of two financial services companies: Company A and an outsourced administration company, Company B. The population was composed of 127 employees from Company A and 298 employees from Company B. The number of respondents from Company A was 93 (73% response rate) and 12 responses were incomplete. Company B had 35 respondents (12% response rate) with 12 incomplete responses. Only 81 of the Company A responses were deemed reliable and included in the study. The majority of these respondents had been working for the company for 0–4 years (16 had tenure of 0–2 years and 21 had tenure of 2–4 years), whereas a large proportion of respondents had tenure of 10 years or more. Of the 81 respondents, there were 47 females (58%) and 34 males (42%).

### Measuring instruments

The instruments all used the Likert-type scale, featuring five anchors, from strongly agree to strongly disagree with the statement.

### Authentic leadership

The researchers used the '16-item' Authentic Leadership Questionnaire (Copyright© 2007 Authentic Leadership Questionnaire ALQ) by Avolio, Gardner and Walumbwa (2007) distributed by Mind Garden Inc. (Walumbwa, Avolio, Gardner, Wernsing & Petersen, 2008). The researchers obtained written permission for use of the ALQ from the creators, Mindgarden. An example of the statements is, 'my leader says exactly what he/she means'.

### Work engagement

The researchers measured work engagement using the '9-item' Utrecht Work Engagement Scale (UWES-9) (Schaufeli *et al.*, 2006) (Schaufeli, Salanova, Gonzalez-Roma & Bakker, 2002). Examples of statements include, 'I am immersed in my work' and 'To me, my job is challenging'.

### Beneficiary contact

The researchers used Grant's three 3-item scales (Grant, 2008). Morgeson's questionnaire (Morgeson, 2006) was considered but as it does not measure the dimensions individually, Grant's 2008 measurement was considered more appropriate. An example from his scales is, 'My job allows frequent communication with the people who benefit from my work'. Following a pilot survey conducted for this study by five employees, as suggested by Rothgeb (2008), the researchers explained the term 'people who benefit from your work' more clearly in the introduction to the survey.

## Design

Line managers provided the names and email addresses of employees. The researchers invited them, via email, to voluntary participate in the study. Data was collected via a web-based survey, accessed via a hyperlink included in the email. The first section of the survey collected biographical data and the second section consisted of a questionnaire combining the three questionnaires described above.

## Data analysis

The researchers chose moderator regression models to examine relationships between the variables. A variance inflation factor (VIF) was calculated, to test for collinearity or ensure that the prediction of the outcome was independent (Enders, 2008). The results confirmed that all the VIFs were below 10 and that therefore there was no multicollinearity problem in terms of the explanatory variables being correlated with each other. The data was analysed by first conducting an analysis of variance test to examine the overall fit of the model for each hypothesis (Lewis-Beck, Bryman & Futing Liao, 2004). The researchers used the *R*-square measures to test the predictive power of the regression and expressed them as percentages.

# Results

The main and subconstructs of authentic leadership had a high Cronbach's alpha of 0.94 and the subconstructs were therefore reliable, as per definition of Gushta and Rupp (2010). The levels of authentic leadership, work engagement and beneficiary contact were all higher for males than females of the 81 responses and the higher level of work engagement for males is in line with previous findings where males have been found to have a higher work engagement than females on the UWES-9 (Schaufeli & Bakker, 2004). There were varying levels of beneficiary contact across the tenure categories and there was no discernible pattern of relationships between tenure and authentic leadership, or with work engagement. These results are in line with the study by Xu and Thomas (2011) which found no relationship between tenure and work engagement. Males showed higher authentic leadership than females, in line with the findings of other studies (Monzani, Hernandez Bark, Van Dick & Peiró, 2014). Mean scores of authentic leadership, work engagement and beneficiary contact across different business units indicated that levels of beneficiary contact were fairly similar across all of them. The mean, standard deviation and Cronbach's alpha are offered in Table 1.

**TABLE 1:** Means, standard deviations, reliabilities (Cronbach's alpha) and Pearson's correlations for all variables.

| Variables | Mean | SD | Alpha | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. ALTR | 3.86 | 0.84 | 0.81 | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 2. ALME | 4.00 | 0.88 | 0.86 | 0.77*** | - | - | - | - | - | - | - | - | - | - | - | - |
| 3. ALBP | 3.66 | 0.95 | 0.76 | 0.69*** | 0.66*** | - | - | - | - | - | - | - | - | - | - | - |
| 4. ALSA | 3.46 | 1.00 | 0.87 | 0.72*** | 0.71*** | 0.78*** | - | - | - | - | - | - | - | - | - | - |
| 5. BCB | 4.02 | 0.76 | 0.71 | 0.12 | 0.03 | 0.05 | 0.00 | - | - | - | - | - | - | - | - | - |
| 6. BCD | 4.10 | 0.80 | 0.77 | 0.16 | 0.06 | 0.08 | 0.06 | 0.76*** | - | - | - | - | - | - | - | - |
| 7. BCF | 3.73 | 0.91 | 0.77 | 0.10 | 0.04 | 0.08 | 0.02 | 0.72*** | 0.70*** | - | - | - | - | - | - | - |
| 8. WEV | 3.50 | 0.81 | 0.79 | 0.59*** | 0.53*** | 0.52*** | 0.50*** | 0.44*** | 0.37*** | 0.29** | - | - | - | - | - | - |
| 9. WED | 3.82 | 0.81 | 0.82 | 0.48*** | 0.33** | 0.39*** | 0.31** | 0.53*** | 0.58*** | 0.47*** | 0.79*** | - | - | - | - | - |
| 10. WEA | 3.88 | 0.87 | n/a | 0.30** | 0.24* | 0.33** | 0.17 | 0.38*** | 0.32** | 0.27*** | 0.66*** | 0.66*** | - | - | - | - |
| 11. AL | 3.76 | 0.81 | 0.94 | 0.90*** | 0.88*** | 0.86*** | 0.90*** | 0.06 | 0.10 | 0.07 | 0.60*** | 0.43*** | 0.29** | - | - | - |
| 12. BC | 3.92 | 0.76 | 0.89 | 0.13 | 0.05 | 0.86 | 0.03 | 0.88*** | 0.88*** | 0.93*** | 0.39*** | 0.57*** | 0.35** | 0.08 | - | - |
| 13. WE | 3.69 | 0.74 | 0.90 | 0.54*** | 0.43*** | 0.47*** | 0.40*** | 0.52*** | 0.52*** | 0.41*** | 0.92*** | 0.95*** | 0.75*** | 0.52*** | 0.52*** | - |

ALTR, Authentic Leadership Relational Transparency; ALME, Authentic Leadership Internalised Moral Perspective; ALBP, Authentic Leadership Balanced Processing; ALSA, Authentic Leadership Self-awareness; BCB, Beneficiary Contact Breadth; BCD, Beneficiary Contact Depth; BCF, Beneficiary Contact Frequency; WEV, Work Engagement Vigour; WED, Work Engagement Dedication; WEA, Work Engagement Absorption; AL, Authentic Leadership; BC, Beneficiary Contact; WE, Work Engagement.

*, $p < 0.05$; **, $p < 0.01$; ***, $p < 0.001$

## Linear relationship and moderating effect of beneficiary contact

The measurement of Hypothesis 1, that there is a linear relationship between authentic leadership and work engagement, resulted in the $R$-square confirming that 27.35% of the dependent variable, work engagement, was explained by the explanatory variable, authentic leadership. The parameter estimate of the authentic leadership variable was significant and illustrates that if authentic leadership increased by 1 standard deviation, work engagement would increase by 0.49 standard deviations.

As the analysis of variance test determined a significant $p$ value (less than 0.05), the researchers concluded that the overall fit of the model was significant. The $R$-square value confirmed that 51.73% of the dependent variable, work engagement, was explained by authentic leadership together with the moderating effect of beneficiary contact. All the $p$ values in this model were significant. The parameter estimate of the authentic leadership variable illustrated that if authentic leadership increased by 1 standard deviation (beneficiary contact was at the mean value, BC = 0), work engagement would increase by 0.45 standard deviations. The parameter estimate of the beneficiary contact variable illustrates that if beneficiary contact increased by 1 standard deviation, work engagement would increase by 0.48 standard deviations.

In contrast to what was expected, the moderating effect of beneficiary contact had a negative $\beta$ value of -0.17. As the $p$ value of the moderator variable was significant, the researchers concluded that beneficiary contact had a moderating effect on the impact of authentic leadership on work engagement, and this moderating effect was negative. In order to assess the moderating effect of beneficiary contact at different levels in this model, Table 2 illustrates the moderating effect at higher and lower levels to the mean value of 0.45.

This section describes the results of the moderator effect of the conditions of beneficiary contact, as discussed under

Hypothesis 3. Table 3 offers a summary of this hypothesis testing on the conditions of beneficiary contact. As the analyses of variance tests concluded significant $p$ values (less than 0.05) for the frequency, breadth and depth of beneficiary contact, the researchers determined that the overall fit of the models was significant. The $R$-square values confirmed that 42.22%, 52.73% and 51.54% respectively of the dependent variable, work engagement, were explained by these models of the explanatory variable, authentic leadership, together with the moderating effects of frequency, breadth and depth of beneficiary contact. The researchers concluded that frequency of beneficiary contact has no moderating effect on the impact of authentic leadership on work engagement, whereas depth and breadth $p$ values were significant.

The researchers investigated the individual constructs of work engagement as discussed under Hypothesis 2 and this section provides the results. Table 3 summarises these results. As analyses of variance tests concluded significant $p$ values (less than 0.05), the researchers inferred that the overall fit of the model was significant. The $R$-square value confirmed that 46.37% of the dependent variable, vigour of work engagement, 49.57% of dedication and 27.99% of absorption were explained by the model of the explanatory variable, authentic leadership, together with the moderating effects of beneficiary contact.

Beneficiary contact had no moderating effect on the impact of authentic leadership on vigour.

Interestingly, in the cases of dedication and absorption, the moderating effects were significant.

The researchers illustrated the results of the investigation around the beneficiary contact as a moderator on the impact of authentic leadership on work engagement in Figure 1.

## Discussion

This study examined three hypotheses around the moderator effect of beneficiary contact on the relationship between authentic leadership and work engagement. The results

**TABLE 2:** Linear relationship and moderating effect.

| Variables | Dependent variable: *df* | Work engagement: Parameter estimate | Standard error |
|---|---|---|---|
| Authentic leadership | 1 | 0.45* | 0.07 |
| Beneficiary contact (BC) | 1 | 0.48* | 0.07 |
| Moderator effect (*β*) | 1 | -0.17* | 0.07 |
| Lower BC (mean -1) | - | 0.62 | - |
| Higher BC (mean +1) | - | 0.27 | - |

*df*, degrees of freedom; *β*, measure of moderator variable; Higher BC, higher degree of beneficiary contact; Lower BC, lower degree of beneficiary contact.
*, $p < 0.05$

**TABLE 3:** Results of moderator regression analysis on beneficiary contact's effect on individual scales of authentic leadership and work engagement.

| Variable | *df* | $\Delta R^2$ | *β* | SE | Higher BC | Lower BC |
|---|---|---|---|---|---|---|
| BC Frequency (a) | 1 | 0.42 | -0.14 | 0.07 | n/a | n/a |
| BC Breadth (b) | 1 | 0.52 | -0.16* | 0.07 | 0.29 | 0.63 |
| BC Depth (c) | 1 | 0.51 | -0.21* | 0.07 | 0.24 | 0.67 |
| WE Vigour (a) | 1 | 0.46 | -0.04 | 0.07 | n/a | n/a |
| WE Dedication (b) | 1 | 0.49 | -0.19* | 0.07 | 0.16 | 0.55 |
| WE Absorption (c) | 1 | 0.27 | -0.34* | 0.09 | -0.07 | 0.61 |
| AL Transparency (a) | 1 | 0.51 | -0.16* | 0.06 | 0.26 | 0.59 |
| AL Moral perspective (b) | 1 | 0.43 | -0.16 | 0.08 | n/a | n/a |
| AL Balanced processing (c) | 1 | 0.44 | -0.08 | 0.06 | n/a | n/a |
| AL Self-awareness (d) | 1 | 0.44 | -0.20* | 0.07 | 0.19 | 0.60 |

*df*, degrees of freedom; $\Delta R^2$, R-square values; *β*, measure of moderator variable; SE, standard error; Higher BC, higher degree of beneficiary contact; Lower BC, lower degree of beneficiary contact; BC, beneficiary contact's; WE, work engagement; AL, authentic leadership.
Frequency (a), breadth (b) and depth (c) of beneficiary contact's moderating effect. Impact on individual constructs of work engagement, namely vigour (a), dedication (b) and absorption (c).
*, $p < 0.05$
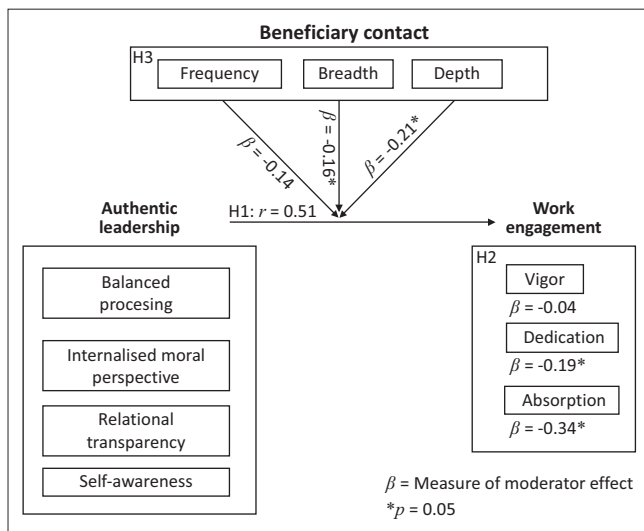


**FIGURE 1:** Illustration of results on individual constructs investigated in this study.

supported the outcomes of previous studies, where authentic leadership had a linear relationship with work engagement (Gardner *et al.*, 2005; Ilies *et al.*, 2005; Shamir & Eilam, 2005). The implication for management is that developing authentic leaders will improve the work engagement of their employees.

The theoretical contribution of the study contributes the contingency theory notion of 'one size does not fit all'. The researchers asked whether the relationship between authentic leadership and work engagement would be universal, or be affected by situational variables, such as a job design allowing for frequency, breadth and depth of relational exchange with the beneficiaries of work. The moderator effect was indeed determined to be statistically significant. It was confirmed

that, for the sample group, beneficiary contact weakened the positive effect of authentic leadership on work engagement, as illustrated in Figure 2.

At the authentic leadership level AL0 the level of work engagement is WE0. Beneficiary contact has the effect of shifting the line to the left and decreasing work engagement from WE0 to WE1 at the same level of authentic leadership, AL0. This finding is in line with Kenny's (2013) declaration that classically, moderation implies a weakening of a causal effect. The implications of this weakening effect means that leadership studies should take note of moderator effects and be careful of making claims about the universality of leaders' impact on followers' engagement. Leadership theory building should therefore expand its focus from leader-follower exchanges to include exchanges between followers and the beneficiaries of their work.

Two competing perspectives on the effect of beneficiary contact were discussed earlier in this article's literary review. The first is the emotional labour and burnout perspective that frequent and emotionally intense interactions with customers and clients are likely to cause strain, stress and burnout (Bennett & Barkensjo, 2005). Second is the job design perspective which holds that beneficiary contact allows employees to identify with, empathise with and understand beneficiaries. The results of this study support the emotional labour perspective, where higher levels of beneficiary contact decrease the positive impact of authentic leadership on work engagement.

The results revealed that affective communications, such as rude or hostile customer feedback, may have the effect of reducing motivation or performance (Grandley &
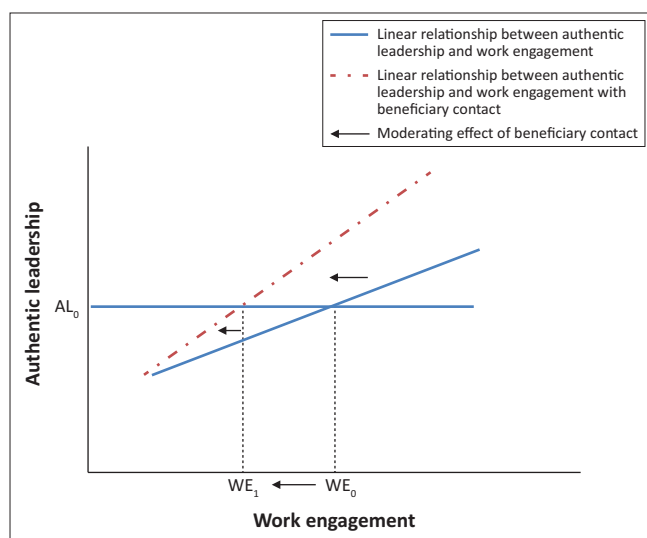
**FIGURE 2:** Graphical depiction of the moderating effect of beneficiary contact on the impact of authentic leadership on work engagement.

Diamond, 2010). The sample was composed of employees working in the financial services sector, which could be classified as an emotional labour occupation as customer interactions are a critical part of the job and customers may be more likely to act in a verbally abusive manner (Grandley et al., 2007). Grant, Fried, Parker and Frese (2010) emphasise that contemporary knowledge workers are exposed to challenging cognitive demands as well as an increase in emotional and interpersonal tasks in service work. The implications are that companies need to assess job roles, in terms of whether beneficiary contact results in higher or decreased levels of work engagement, and then design levels of beneficiary contact accordingly. For example, they could rotate employees between higher and lower levels, or between types of contact, such as frontline and back office roles.

## Outline of the results

### The individual constructs of beneficiary contact: Breadth, depth and frequency

The results of the data analysis in this study endorsed two of the individual constructs, breadth and depth of beneficiary contact, as having a moderating effect on the impact of authentic leadership on work engagement. The dimension of frequency was not statistically significant. The literature suggests that those employees that interact with beneficiaries frequently have a lower role ambiguity, as well as higher perceived task significance (Grandley & Diamond, 2010). However, the results indicate that a higher frequency of beneficiary contact does not have a significant moderating effect. The literature does not provide evidence of the effect of breadth of beneficiary contact, whereas the results of this study indicated that if jobs are designed to have a variety of interactions with different beneficiaries, the impact of authentic leadership on work engagement will be decreased for this sample. Grant characterises depth of contact to be likely in service jobs, such as those of physician or counsellor (Grant, 2008) and it could be proposed that deep contact would be rare in the financial

services industry. Thus, if jobs are designed to have opportunities for emotionally intense interactions with beneficiaries, the impact of authentic leadership on work engagement will be decreased. Leaders would need to adapt to these situations by purposefully increasing their authentic leadership, especially relational transparency and self-awareness to compensate for the difficulties that their followers are experiencing.

## Moderating effect on the individual constructs of work engagement

The study substantiated some elements of Hypothesis 2, that beneficiary contact has a moderating effect on the impact of authentic leadership on the individual constructs of work engagement. Beneficiary contact did not have a significant effect on vigour. This ties in with the literature, where work engagement (vigour) and burnout (exhaustion) do not form opposite sides of the same continuum and were found to represent independent dimensions (Demerouti et al., 2010). For the sample group in this study, beneficiary contact decreased the impact of authentic leadership on dedication. This ties in with the literature, where work engagement (dedication) and burnout (cynicism or disengagement) were not considered to be each other's opposite (Demerouti et al., 2010), and the emotional labour and burnout focus of this dimension is confirmed. Dedication is an identification dimension, where emotional experiences, such as hostile or rude feedback, could affect enthusiasm and pride. Beneficiary contact also decreased the impact of authentic leadership on absorption. This could be explained by negative experiences with beneficiaries resulting in the employee losing self-confidence and enthusiasm (Bennett & Barkensjo, 2005), and therefore concentration. Being happily engrossed in one's work is decreased.

## Practical implications

Leaders could increase work engagement in situations where clients are demanding by focusing on developing their followers' confidence and pride, as well as reinforcing their achievements and celebrating successes. It is not always possible to design jobs with lower levels, or varying levels, of beneficiary contact, and thus the organisation will need to find alternative means to counter this negative effect. Strain, stress and burnout are possible outcomes, and employees need to be trained on how to deal with difficult clients, and handle the stress of negative encounters. Management needs to be mindful of the potential for lower work engagement, and should implement other measures to increase work engagement, such as providing additional job resources (Bakker & Demerouti, 2008), supporting employees to use their strengths (Van Woerkom, Bakker & Nishii, 2016), cultivating shared group identity (Steffens, Haslam, Kerschreiter, Schuh & van Dick, 2014) and increasing general organisational support (Rich, Lepine & Crawford, 2010). Leadership development could benefit from this wider perspective, rather than focusing exclusively on increasing individual leaders' interpersonal skills. Without changing

the structures within which these relationships are embedded, the return on leadership development investment might not be optimised. In line with contingency theories like the Path-goal of House (1971), leaders need to adjust to situations in which their followers have intense exchanges with the beneficiaries of their work and make an extra effort to engage them under these circumstances.

## Limitations and recommendations

The researchers ultimately restricted the sample to one financial services company and therefore the findings might be limited for use as a guide for financial services companies. The research was conducted as a cross-sectional study, which does not provide the depth of analysis of a longitudinal study. The research was limited to the focus on authentic leadership, and did not provide an analysis of the impact of various leadership styles. The research did not examine the other causal factors that influence work engagement, such as job resources or personality traits of employees. The study was limited to one financial services company and future studies should include a larger number of employees, across a variety of organisations, to examine consistency of results. Future research should address the role of different types of beneficiaries and investigate the moderating role that they have on work engagement. Further research should manipulate and measure the other leadership constructs, such as empowering leadership and transformational leadership, in this model. Further studies could investigate the moderating impact of numerous other organisational context variables, such as culture or climate, on authentic leadership.

## Conclusion

This study focused on ascertaining whether beneficiary contact had a moderating effect on the impact of authentic leadership on work engagement, and drilled down into the variables within the individual constructs with the same objective. The moderating effect of beneficiary contact was concluded to be a negative effect, although not all of the results were deemed significant. The researchers proposed that the reason for beneficiary contact having a negative moderating effect, and thus decreasing the impact of authentic leadership on work engagement, was that beneficiary contact had an emotional labour and burnout focus, where emotionally intense interactions with beneficiaries were likely to cause strain, stress and burnout (Grant & Parker, 2009). The following quote illustrates the negative effect that beneficiary contact possibly had on the sample group in this study:

> In the public world of work, it is often part of an individual's job to accept uneven exchanges, to be treated with disrespect or anger by a client, all the while closeting into fantasy the anger one would like to respond with. (Hochschild, 1983, p. 86)

The study revealed how the impact of authentic leadership was contingent upon different types of beneficiary contacts.

# Acknowledgements

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# A narrative investigation into the meaning and experience of career success: Perspectives from women participants

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**Orientation:** In South Africa opportunities are being created that encourage more women to enter the workforce. Understanding how women conceptualise and experience career success affects not only their individual career development but also their general outlook in life.

**Research purpose:** To investigate how a sample of previously disadvantaged women distance learners conceptualise and experience the notion of career success.

**Motivation for the study:** Calls have been made for research incorporating a subjective understanding regarding career success, especially amongst minority groups.

**Research approach, design and method:** An interpretive approach was employed aimed at understanding individual experience and the interpretation of it. Unstructured interviews were conducted shaped by the objectives of the study amongst a sample of women ($n = 25$).

**Main findings:** Through narratives and stories, findings revealed career success to be conceptualised and experienced as (1) a means of professional attainment and recognition, (2) a contribution to society and (3) evident in material and non-material artefacts. Further, from the sample of women used in this research, the experience of career success considered not only socio-historical issues and community but also the cultural milieu. Education emerged as an enabler of individual pursuit and goals leading to career success.

**Practical/managerial implications:** An understanding of how career success is conceptualised and experienced by previously disadvantaged women can serve as a forerunner to individual specific career development interventions. The results of the study are therefore useful to both academics and practitioners in their formulation of interventions that enable individual career development.

**Contribution:** The experience of career success as found in this study through participant narratives and stories gave a picture of career development processes amongst previously disadvantaged groups in South Africa. These processes illustrate how individuals draw meaning and a sense of direction en route to career success, revealing aspirations affecting not only their career development but also their lived experience.

## Introduction

Women in South Africa occupy a strategic position. Laws such as the *Employment Act* of 1998 have been credited with encouraging the involvement and increasing the number of women in key sectors of the South African economy (Mahlomaholo, 2011; Mkhize & Msweli, 2011). Furthermore, initiatives such as Affirmative Action (AA) and Employment Equity (EE) have been introduced with the belief that they will achieve equality in a largely divided society (Czakan, 2006). The focus here is on giving organisations' AA and EE targets an opportunity to open a passage into their influence in the socio-economic cluster of the country (Booysen, 1999). This has been suggested to be a way to improve the lives individuals who are AA and EE targets (De Bruin, 2000).

Despite this progress through AA and EE initiaves, women remain under-represented in South African organisations (Booysen & Nkomo, 2010; Moletsane & Reddy, 2008). This under-representation has been attributed to the history of South Africa including the policy of apartheid (Sedibe, 2011). The ideological basis of apartheid was around 'separateness' by colour and this subsequently relegated women (Cottrell, 2005). In South Africa, the term 'previously disadvantaged' is used to describe those individuals or categories of persons who, prior to the new democratic South Africa, were unfairly discriminated on the basis of their race (Nefcorp, 2005).

These individuals include mostly black African people, mixed race people, Indian people, women and people living with disabilities (Cottrell, 2005).

Traditional career development theories have been used to understand phenomena such as career success. However, such theories have been criticised for providing a static view of careers (Hirshi, 2011) and one that does not account for the possibility of complexity and the unpredictable nature of variables influencing career development (Patton & McMahon, 2006). Others (e.g. Asuquo & Inaja, 2013) highlight a shortcoming of traditional career theories in the omission of the needs of groups such as women, with a focus more of elite white men and matching them to jobs. Further, in understanding the career development processes of groups such as women, the empirical focus should move away from the matching of careers (as espoused in traditional career theories) to determining the factors that may retain and sustain individual career development in a demanding context (Watt, Richardson, & Wilkins, 2014).

Traditional career theories have also been noted for their omission of environmental context in shaping careers. Ozbilgin (2011) advocates a more situated (geographical and cultural) perspective in understanding career development that is contextually relevant. This fits in with calls for studies to be less general and more specific in relation to contextual issues affecting people (Edwards, 2011; Khapova & Arthur, 2011). This is an important focus, especially given the environmental changes that shape individual careers in contemporary society (Chudzikowski & Mayrhofer, 2011). Such a research focus is believed to not only aid understanding of career development, but also challenge traditionally held views of a career being linear and following a developmental stage approach (Sullivan, 1999; Sullivan & Baruch, 2009).

To aid the retention of women in organisations, researchers continually argue for an investigation into how women experience success (Maxwell & Ogden, 2011; Pheko, 2014). This is important given that such groups of people have received little or no empirical focus (Themba, Oosthuizen & Coetzee, 2012). Such inclusive approaches are helpful not only in modern career management practices, but also to keep up with changes (social, economic and political) that have happened in South Africa (Oosthuizen, Coetzee & Mntonintshi, 2014). By applying this focus, it may be a useful launchpad to informing not just career development initiatives, but also the retention of women in organisations. Subsequently, this has an overall bearing on the lived experience of the individual (Price, 2009). However, little is still known in South Africa concerning individual career success as part of career development (Coetzee & Gunz, 2012; Koekemoer, 2014).

There is also acknowledgement of the role distance learning can play on individual career development (Burgess & Russell, 2003). Pityana (2009) notes distance education as addressing two key barriers faced by previously disadvantaged groups, namely location and lack of funds. Lemmer (2009) applauds distance education as popular for those individuals who require flexibility between work and study. In all this, distance education is the most popular mode of instruction especially amongst previously disadvantaged individuals (Department of Education, 2010; Department of Higher Education and Training, 2013). An understanding of the career development processes of previously disadvantaged individuals can be a starting point for career interventions specific to their situation.

Calls have been made for studies that focus on how distance learning can further develop human capital skill sets (Reimers-Hild, Fritz & King, 2007) and individual career development (Burgess & Russell, 2003; Chinyamurindi, 2012). Furthermore, qualitative methods are advocated as important in understanding the career development processes of previously disadvantaged individuals such as women (Maree, 2010, 2014, 2015) given that such individuals face complexity in their career development not often captured easily through the quantitative research paradigm. Such research approaches are applauded, especially in societies faced with a great deal of environmental complexity (Savickas, 2011).

Within this, Austin and Cilliers (2011) argue that given the macro environmental changes happening in South Africa, there is a need to investigate how such change impacts the individual and their career development using sample groups that have received scant empirical focus. One such sample group that remains 'understudied' in South African career research is previously disadvantaged individuals, which includes women (Schreuder & Coetzee, 2012, p. 2), especially those individuals involved in lifelong learning (Braimoh, 2010) who are working and studying at the same time whilst subject to initiatives of economic redress.

## Research purpose and objectives

Research into career success is growing in South Africa (e.g. Koekemoer, 2014; Pheko, 2014) and internationally (for an overview see Ng, Eby, Sorensen & Feldman, 2005). Nevertheless, there seems to be the need for further research on career success using different sample groups with their specific situations and experiences in mind. There is acknowledgement that the career development of women is theorised to be different from men (O'Neil & Bilimoria, 2005) and also that distance learning can aid individual career development (Braimoh, 2010; Burgess & Russell, 2003; Chinyamurindi, 2012). The purpose of this study was to identify specific factors that influence the career success of women distance learners within the South African context, thereby helping to inform career interventions and improving the lived experience. The overall research question that guided this study was: *What factors (given the South African context) influence the career success of women distance learners in South Africa?*

## Background of career success

Career success is defined as the individual's accumulation of positive work-related and psychological outcomes from the work experience (Judge, Cable, Boudreau & Bretz, 1995). By understanding the factors that influence individual framing of career success, this may impact career development in general (Gattiker & Larwood, 1986).

Career success was once viewed as following an upward trajectory of lifetime employment in one organisation (Adamson, Doherty & Viney, 1998). However, in view of the changing environmental context, this view may not be guaranteed (Maree, 2014; Savickas, 2011). Such a focus that pays attention to the complex and unpredictable nature of career development is receiving empirical focus and has been labelled as part of the 'new' agenda within career literature (Chudzikowski, 2012, p. 298).

The 'new' agenda in career literature is one that tries to identify the individual and organisational variables that influence individual framing of career success (Heslin, 2005). Given this, there is increasing empirical focus on understanding career development as part of this 'new' agenda (e.g. Joo & Park, 2010; Ndzube, 2013; Price, 2009). Career success has been framed to be either objective or subjective (Baruch, 2006).

## Objective and subjective career success

A distinction is offered between objective and subjective career success. The former is thought to strive for the observable, measurable and verifiable attainment (Dries, Pepermans, & Rypens, 2009). An example of objective career success includes monthly salary and status (Abele & Spurk, 2009). On the other hand, subjective career success is viewed as an individual's evaluation of the present achievements compared to their personal goals and expectations (Seibert & Kraimer, 2001). Examples of subjective career success include career satisfaction (Greenhaus, Parasuraman & Wormley, 1990) and job satisfaction (Ng *et al.*, 2005). There appears to be an empirical slanting towards the use of quasi-objective measures of career success (Dries *et al.*, 2009). The thinking here is the need to generate objective data that are observable and measurable based on scientifically tested instruments (Nicholson, 2000). Given the importance and popularity of career success in the academic press, there is continued focus on investigating those factors that influence or impede career success (Coetzee & Schreuder, 2009; Koekemoer, 2014; Pheko, 2014).

## Predictors of career success for women

A number of studies (mostly international) exist investigating the subjective evaluations of career success amongst women. Even with research using both male and female participants, there is limited focus on investigating career success (Koekemoer, 2014). A summary of international and national studies investigating the predictors of career success is shown in Table 1. Notably, based on Table 1, no study has investigated the factors that either contribute to or impede career success amongst women distance learners, despite a number of recommendations. For instance, Pheko (2014, p. 9) suggests the need for research around career success amongst 'women with similar profiles' like 'educational background'. The women to be used in this study are all from the previously disadvantaged cohort who are working and studying via distance learning. Others like Koekemoer (2014, p. 2) suggest that in South Africa research on career success is 'timeous' given the popularity of this research stream internationally. As its contribution, this study seeks to answers these calls.

# Research design

## Research approach

The study adopted a qualitative exploratory research approach. The rationale for this was that this approach was useful in understanding the factors influencing career success (Koekemoer, 2014). Such an approach allows for understanding of experience and the interpretation of it from the individual viewpoint (Hallebone & Priest, 2009). The focus here is on understanding human experiences from a holistic and in-depth perspective (Vishnevsky & Beanlands, 2004), rather than it being fragmented as often employed in survey-based techniques. This is done through collecting more situational information and extrapolating the meaning and purpose that individuals attach to their actions (Guba & Lincoln, 1994).

## Research strategy

Unstructured interviews were preferred over semi-structured interviews using a sample of career women who were working and studying at the same time. Stead and Watson (2006, p. 86) argue that semi-structured interviews tend to imply a 'search for specific course of events'. The focus of this research was not to impose any predetermined structure in understanding career success; semi-structured interviews would assume this predetermination. Unstructured interviews helped to allow participants to share freely their situation from their own points of view (Fraenkel & Wallen, 2006). This allowed investigation into how individuals make meaning of their lived experiences (Walter, 2006). Participants could open up memories, reflect on experiences, elaborate on ideas and clarify responses during the course of the interview (Rubin & Rubin, 2005).

# Research method

## Research setting, sampling and participants

The research project was part of a partnership between two institutions, one located in the United Kingdom (Open University Business School) and the other in South Africa (University of South Africa). The author of this article was pursuing his PhD studies with the United Kingdom institution and had also worked as a junior academic in South Africa. The South African institution had a regional

**TABLE 1:** Summary of South African and international studies focusing on predictors of career success amongst women.

| Author(s) | Context and method | Research design and methods | Finding(s) |
|---|---|---|---|
| Pheko (2014) | Batswana female managers | Qualitative approach | Salient factors that may impede or contribute to career success:<br>a) hard work<br>b) career vision<br>c) work relationships<br>d) work-life balance<br>e) lack of female mentors<br>f) stereotypes |
| Maxwell and Ogden (2011) | Women managers working in retail in the United Kingdom | Qualitative approach using interviews and focus groups | Factors that contribute to career success:<br>a) organisational culture and management influence<br>b) support of senior managers<br>c) formal & informal work practice<br><br>Factors that impede career success:<br>a) relationships<br>b) family responsibilities<br>c) policies<br>d) work-life balance |
| Ip (2011) | Women in science careers in Asia | Personal opinion | Factors that contribute to career success:<br>a) sound national policy supporting women's career development<br>b) the right attitude<br>c) seeking assistance |
| Doubell and Struwig (2014) | South African study with professional and business women | Quantitative approach | Salient factors that may impede or contribute to career success:<br>a) demographics<br>b) personality<br>c) culture<br>d) external and internal support |
| Riordan and Louw-Potgieter (2011) | South African women academics | Quantitative approach | Subjective predictors of career success include:<br>a) work centrality<br>b) self-efficacy<br>c) motivational expectations<br>d) motivational valence |
| Evers and Sieverding (2014) | German context | Quantitative approach | Salient findings:<br>Women were found to interrupt their careers longer than men in pursuit of career goals. This was a barrier to their career success |
| Bombuwela and Chamaru (2013) | Sri Lankan women | Quantitative approach | Salient factors that may impede or contribute to career success:<br>a) individual factors<br>b) family factors<br>c) organisational factors |
| Yet-Mee, Peng and Yin-Fah (2013) | Malay women | Quantitative approach | Salient finding:<br>The quest for work-life balance found to either impede or contribute to career success |
| Ravindaran and Baral (2013) | Indian women | Quantitative approach | Salient factors that may impede or contribute to career success:<br>a) organisational factors<br>b) policy support<br>c) diverse climate<br>d) career support |
| Sasithornsaowapa (2013) | Thai female executives | Quantitative approach | Salient factors that may impede or contribute to career success:<br>a) career development as a first priority<br>b) having a job related o education<br>c) quests for job satisfaction |
| Teo *et al.* (2014) | Women executives in western Australia | Qualitative approach | Salient factors that may impede or contribute to career success:<br>a) networks<br>b) participation in professional development activities |
| Raburu (2015) | Women academics in Kenya | Qualitative approach | Salient factors that may impede or contribute to career success:<br>a) sociocultural attitudes<br>b) family responsibilities<br>c) status of women in society |

Note: Please see the full reference list of the article, Chinyamurindi, W.T. (2015). A narrative investigation into the meaning and experience of career success: Perspectives from women participants. *SA Journal of Human Resource Management/SA Tydskrif vir Menslikehulpbronbestuur*, *13*(1), Art. #659, 11 pages. http://dx.doi.org/10.4102/sajhrm.v13i1.659, for more information.

hub located in the city of Port Elizabeth and was chosen due to researcher familiarity.

## Entree and establishing researcher roles

Given that the study involved two universities, ethics approval was sought from and granted by both universities. Permission was also sought from participants who were informed of the purpose of the research and how data generated will be used for teaching purposes and writing journal articles.

### Sampling and participants

Convenience sampling (Cohen, Manion & Morrison, 2007, p. 114) was used for this research and allowed the researcher to identify 'available and accessible' participants for the study. The hosting South African university served

as a strategic hub from which potential participants could be sampled. Inclusion and exclusion criteria had to be adopted. All participants had be registered distance learners with the South African university. Participants were excluded if they did not meet this criterion. A total of 25 women participants took part in the research; Table 2 summarises the characteristics of the 30 participants used as part of this study.

## Data collection methods

The interviews were recorded and transcribed verbatim. In addition to this, notes were made to accompany the recording. Given that participants in the study were studying and working, a strategic hub in the form of a leading distance learning university campus was important in accessing the sample. Participants had to be recognised

by law of being previously disadvantaged either by race or by gender (Cottrell, 2005). Participants were excluded if they did not meet this criterion. Participants were approached and informed of the goals of the study and consent asked for their participation. Upon agreeing, participants filled in a consent form and their confidentiality was guaranteed. Since the study involved two universities, geographically separated, ethical clearance was applied for at both institutions and granted. In addition, participants in the research had to give consent before taking part in the research.

## Recording of the data

### Data analysis

The interviews were exported into QSR International's NVivo 9, a data analysis and management software package useful when dealing with a lot of text, graphic, audio and video data (Reuben & Bobat, 2014). A data analysis procedure based on three levels of meaning making as adopted in

previous research was used (e.g. Chinyamurindi, 2012; McCormack, 2000). Table 3 represents the stages of the levels of meaning making adopted in the data analysis.

Level 1 was helpful in developing a good understanding of the career development experience of each participant. This was done by rereading each interview and listening to audio recordings. Such a process allowed for the identification of 'markers' in the stories (McCormack, 2000, p. 282) and answering the following question about each interview: 'What kind of story is this?' (Thornhill, Clare & May, 2004, p. 188). Level 2 was achieved through classifying responses from participants into meaningful categories (Nachmias & Nachmias, 1996). Finally, in level 3, the researcher analysed the content of the gathered narrative accounts and themes (McCormack, 2000). This was done by identifying themes and using quotes based on consistencies across participant stories (Rhodes, 2000).

## Strategies to ensure data quality and reporting

To ensure data quality, four steps were taken. Firstly, initial interview questions were pre-tested with a sample of 10 students (non-participants) who fit the same profile as those interviewed in the main part of the research. Secondly, to ensure credible data, all interview data were recorded and transcribed verbatim within 24 hours. Thirdly, after transcription data, participants were emailed a copy of the transcription to verify if this was accurate as per the interview. Finally, before and during the study, reflexivity was conducted to safeguard objectivity and avoid researcher bias (Lewin, Taylor & Gibbs, 2005); this was also done to ensure sensitivity with regard to how data is collected, analysed and represented (Mays & Pope, 2000). In doing so, comprehensive notes were taken at all key stages of the research for additional depth and quality.

# Research results and findings

Based on the data analysis, various factors emerged that portray a picture of the factors that contribute to and impede the career success of women (see Figure 1) and these are discussed next. Table 4 presents a summary of the factors that contribute to career success and Table 5 presents those factors that impede career success.

## Contributing factors

Table 4 presents the specific factors contributing to the success of women. Participants considered career success to be influenced by the intersection between individual factors with individual characteristics and contextual factors such

**TABLE 2:** The characteristics of the respondents.

| Pseudonym | Occupation | Age | Work experience | Race group |
|---|---|---|---|---|
| Jennifer | Bank teller | 29 | 5 | Black |
| Mary | Administrator | 27 | 8 | Black |
| Nandipha | Store assistant | 22 | 2 | Black |
| Busi | Teacher | 44 | 10 | Black |
| Nwabisa | Accountant | 30 | 8 | Black |
| Michelle | Engineer | 31 | 9 | Black |
| Rachel | Secretary | 30 | 5 | Black |
| Helen | Teacher | 27 | 2 | Mixed race |
| Unathi | Unemployed (volunteering) | 23 | 2 | Black |
| Glenda | Police officer | 49 | 7 | Black |
| Rayline | Clerk | 30 | 5 | Mixed race |
| Tshepiso | Unemployed (volunteering) | 23 | 2 | Black |
| Sarah | Clerk | 29 | 5 | Black |
| Bridget | Human resources officer | 52 | 15 | Black |
| Kate | Teacher | 25 | 9 | Mixed race |
| Zandile | Quality assurance officer | 38 | 4 | Black |
| Patience | Unemployed (volunteering) | 23 | 2 | Mixed race |
| Nomusa | Social Work | 29 | 5 | Black |
| Siphokazi | Secretary | 25 | 8 | Black |
| Zama | Teacher | 38 | 15 | Black |
| Nkulie | Human resources officer | 35 | 5 | Black |
| Anna | Sales officer | 25 | 3 | Black |
| Becky | Accountant | 24 | 2 | Mixed race |
| Sherry | Clerk | 25 | 3 | Mixed race |
| Jenny | Public relations officer | 29 | 4 | Mixed race |

**TABLE 3:** Data analysis procedure.

| Level of meaning making | Description |
|---|---|
| 1 | Each interview is written as a brief vignette. Thereafter, each vignette is then developed into a longer narrative about each participant. |
| 2 | Narrative themes are then conveyed by participants and their experience of career development. Thereafter, preliminary themes are then compared across participants. |
| 3 | An analysis of the themes from cross-case comparison begins and illustrating quotes and stories are used. |

as presence of support structures, interventions such as employment equity and affirmative action and educational attainment.

Educational attainment refers to the quest for professional attainment and receiving recognition for this. Most participants cited the recognition and responsibility that comes with a professional title. Salient titles included being '*an accountant*', '*a lawyer*' and '*a psychologist*'. Thus, educational attainment was viewed as a contributing factor towards individual career success as this led to the attainment of an '*expert*' status.

An example is given from one participant's story. Jennifer was working as a bank teller and also studying via distance learning for an accounting degree. Her wish was to use her accounting qualification to move away from being a bank teller to becoming a '*chartered accountant*' within the bank. During the interview she painted a picture of how she did not enjoy the '*routine*' and mundane activities that came with being a teller. For her, being a '*chartered accountant*' was the

goal to be attained although she did not like the journey leading to this. In her narration, educational attainment was to contribute to her attaining '*expert*' status:

> 'It's about being an expert at what I do and people turning to me because of this expertise. If that happens then I consider myself as successful.' (Jennifer, bank teller, black, 29 years old)

Another participant's narrative echoed the same sentiments. Mary was head hunted to work in an administrative role for a new bank. This role entailed '*challenging*' tasks. Mary enrolled to study via distance learning so as to improve her chances of being promoted in the bank. Like Jennifer, Mary also made reference to professional attainment and recognition as an evaluation of career success:

> 'I would love to be good and be an expert in something. In my company I am becoming that within sales and customer relationship management. I feel I am going somewhere and I am getting the recognition of an expert.' (Mary, administrator, black, 27 years old)

Attaining an education appears to open doors for participants; their individual career development is subsequently viewed as linked to career success. This was manifest mainly through further study by distance learning and taking up opportunities for further career development. Participants did not see themselves as being stagnant, but as constantly improving themselves. The quest for growth was actuated through the need for further study and also taking part in organisational training interventions to improve individual skills and qualifications.

From the interviews, the presence of support structures provided a platform from which to achieve career success. Such support structures appear to be routed within
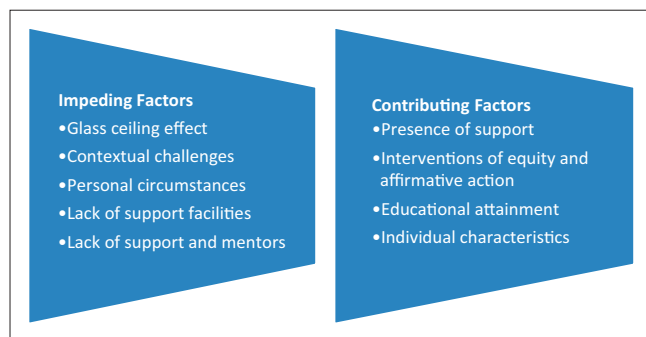


*Source*: Author's own creation

**FIGURE 1:** Factors contributing to and impending career success.

**TABLE 4:** Summary of factors perceived to contribute to career success.

| Factor | Meaning | Example quotes |
|---|---|---|
| The presence of support | The contributing influence of individuals, family, community members and organisational members towards career development. Support came in various forms: material and non-material support. | 'My family has sacrificed a lot for me to be where I am. Paying my fees, my subsistence and even at my lowest moments of dealing with job loss. I am here really because of them.' – Rachel |
| | | 'South Africa is really about who you know. I am here today because of my connections and friends. There is no way as a black person and also a woman I would have succeeded without these people. I am a success today because of such support opening doors for me career wise that were shut.' – Rayline |
| Interventions of equity and affirmative action | The role edict and legislative laws introduced to give previously disadvantaged groups an opportunity for advancement. These included internships, jobs for designated groups and the filling of necessary quotas in organisations. | 'I was really at the right place at the right time. I got a call from a recruiting company after years of job hunting and being rejected. Their client was looking in simple terms for a black person to join them. Though I want people to acknowledge my competencies first, my race got me the one job that has made me what I am.' – Sherry |
| | | 'I applied for internship meant for previously disadvantaged people, I got in and that's all I wanted; to get in. What has happened to this point was due to that one opportunity of getting in the system.' – Nkulie |
| | | 'I want people especially those incorporate South Africa to embrace my being a woman and being black. So many opportunities exist out there especially for black women, that's all I needed to make an impact.' – Nwabisa |
| Educational attainment | Quests around getting a qualification or rising to an expert status. | 'Getting my education degree made me get promoted; I am now a senior educator. I think studying further like I am doing will open further doors for career advancement.' – Busi |
| | | 'I needed to do some professional courses as a promotion was due at work. Completing these courses not only made me get a promotion but gave me an expert role of being quality assurance guru. I must live up to my titles and qualifications to continue being a success.' – Zandile |
| Individual characteristics | Specific individual attributes and activities and their role of career development. | 'I am a testimony of the fruits of hard work and this why I am successful not because I am black or a woman but because I worked hard for what I have.' – Nomusa |
| | | 'There is no substitute for persistence and determination. These are traits I was taught from a young age and have used to shape my life. These have me what I am.' – Kate |

community and were used for various activities. For instance, Bridget attributes her success to her family who have 'stood by her even when she has made some bad decisions'. It appears that the proximity of family to Bridget made her trust them and hence she could turn to them for support. Others like Glenda cited the role of friends as the factor contributing to her success. In her narration, Glenda discussed gender and race:

'Truth be told there is no place for a woman let alone a black woman in the corporate world. So we decided to make a way for ourselves as sisters. One of my friends works for a reputable motor manufacturing company here in Port Elizabeth, she got a good job. She then supported me through mentoring and even talking to her superiors so I can get in the system. Now that I am here and consider myself successful, I must help the next black sister also struggling to get in. That's how we should do it, sisters doing it for themselves.' (Glenda, police officer, black, 49 years old)

Interventions targeted at redress were also attributed to be influential in contributing to the success of women. The quotes by Sherry, Nkulie and Nwabisa in Table 4 illustrate this. Such interventions, like the presence of support, provided a platform from which women could enter a workplace that has barriers. A final contributing factor to success were those qualities specific to the individual such as being hardworking and persistent despite challenges. Interestingly, some of the women also brought up race and gender not as proxies to their success, but rather attributing influence to individual characteristics and qualities such as hard work, as in the case of Nomusa (see Table 4).

This study also found factors that revealed barriers affecting career success of women; illustrating quotes are presented in Table 5.

## Impeding factors

Like factors contributing towards career success, those factors that impede career success were specific to the individuals and also contextual. For instance, participants like Nwabisa cited contextual challenges as influencing her career development and subsequent framing of career success due to perceptions of the role of a woman in society:

'I am from rural Cofimvaba and you can see people in my community are not supportive to the career development of women. This can be due to thinking that our role as women is just to have children, stay in the kitchen and fend for the children. To an extent because of this prevailing attitude, girls like me will never be anything and that is sad and limiting.' (Nwabisa, accountant, black, 30 years old)

Contextual challenges appear to also trickle into personal challenges and impede career success. Notably, personal circumstances such as poverty were salient. However, participants such as Zama (illustrated in Table 5) cited personal challenge pertaining to the need for balance between duties of being a mother and wife and also a career woman as impeding her career success. Linked to this were also barriers such as the glass ceiling effect, also cited as common in the workplace. Continual reference was made by participants to the privileged position of men ahead of women and the preferential treatment they receive in society.

The quotes from Becky and Anna in Table 5 bring into focus the existence of prejudice against women in corporate South Africa.

## Role of distance learning on individual career development

In the framing of career success, the role of distance learning appears to serve as a utility function of advancing individual career development en route to the experience of career success. Generally, participants cited mixed emotions towards studying by distance:

'Being a distance learner has helped me realise my career goal of finally getting a tertiary qualification. This means that I can be

**TABLE 5:** Summary of factors perceived to impede career success.

| Factor | Meaning | Example quotes |
|---|---|---|
| Glass ceiling | Barriers that stop the career advancement of women to higher positions. These could be through organisational policy, human influenced tactics and sabotage by others. | 'Every day is a struggle at work, two steps forward and three steps backward. I feel as if the workplace is a male dominated world and to my colleagues there is no place for a woman. Promotions are not coming my way and there are no opportunities for advancement. On the other hand, male colleagues on the same salary bracket as me are soaring.' – Anna |
| | | 'It's a man's world in corporate South Africa, an all boys club. You remain static if you do everything by the book. Break loose for your advancement else you are going nowhere.' – Becky |
| Contextual challenges | Social and economic challenges and their role on individual career development. | 'Growing up in the townships of Motherwell, one must contend with poverty, high crime and growing unemployment. Every male and female must face these challenges, for the girl child your career advancement is affected due to these challenges.' – Nandipha |
| | | 'There is no money to go to good schools. You end up in schools that are under-resourced and bad facilities. While on the other side of town our White friends have everything made for them. It's tough being a black person in South Africa, our problem lies in where we are from. Change our context you change our lives and we to can be a success.' – Busi |
| Personal circumstances | Challenges that exist around personal circumstances. These include: dealing with family responsibilities and work-life balance. | 'I am a wife, a mother and career person. The challenge is to juggle around these roles and seek a balance. That to me is a challenge, if I advance to a senior position, it means compromising my motherly and wife duties. From my culture I would have failed if I neglect my husband and kids.' – Zama |
| Lack of resources and support facilities | The absence of material and non-material artefacts and their influence on career development. | 'I think I would have finished my degree if I had face to face contact. Distance learning is tough and the lack of support has affected my career advancement. No degree means no promotion.' – Patience |
| | | 'No positive role models exist for me. I watched a movie once and heard a line that goes – it's hard to soar with the eagles when surrounded by turkeys. I think things will be different career wise and my life if I had a good support mechanism.' – Sarah |

taken seriously in my organisation. However, it's not easy. It's a struggle of balancing between work, personal life and study. Sometimes I don't know how I cope.' (Siphokazi, secretary, black, 25 years old)

Furthermore, distance learning appeared to also meet a pragmatic need for participants as a cost-effective mode of study in comparison to full-time studying:

'Distance learning is really cheap and I guess with my financial situation this is not only important but a priority as I want to reach my career goals.' (Michelle, engineer, black, 31 years old)

Finally, distance learning fit well with seeking a balance in life. It would appear that career success was not just an experience of accomplishment in terms of study and also working life, but also about seeking a balance between all these:

'I do not want to be a successful person career wise and yet a failure to my family. Distance learning is flexible so I can still be a mother and a wife while also pursuing my own ambitions.' (Zama, teacher, black, 38 years old)

Distance learning emerged as an enabler of the framing of career success through skills acquisition and attaining professional qualifications. Thus, distance learning was a tool to achieving career success.

# Discussion

## Outline of the findings

The purpose of this study was to identify the specific factors that influence the career success of women distance learners within a South African context. Two types of factors emerged. Contributing factors are those factors that encourage the career development of women and subsequently their framing of career success. Impeding factors are those that act as barriers towards career development and subsequently affect an individual's career success.

Firstly, contributing factors were identified and further grouped into two categories:

- Individual specific factors such as drive, motivation and individual strategies leading to career success. For example, the quest for educational and professional attainment.
- Contextual factors such as the presence of support and the influence of policies and legislative mandates aimed at redress.

Secondly, impeding factors are also grouped into two categories:

- Individual specific factors around personal circumstance and challenges. These challenges include lack of resources and support facilities, work-life balance and attending to family responsibilities.
- Contextual factors include factors in the organisation and factors in the macro environment.

Both contributing and impeding factors that influence career success include individual and contextual factors. Generally, these two factors are the same as the factors that influence career development as theorised within the Systems Theory Framework (Patton & McMahon, 2006). This study has illustrated their role in the experience of career success amongst a sample of previously disadvantaged women in South Africa.

## Relating main findings to literature

The findings of this research appear to support some general factors that contribute to or impede the career success of women. There is support of previous studies that showed factors that contribute to career success such as support structures available to women (Doubell & Struwig, 2014; Ravindaran & Baral, 2013), individual specific attributes of women (Ip, 2011; Riordan & Louw-Potgieter, 2011) and the influence of organisational and professional development efforts (Bombuwela & Chamaru, 2013; Sasithornsaowapa, 2013; Teo, Lord & Nowak, 2014). In essence, these factors were acknowledged by participants in this study to inform career development positively and to aid individual progress. The interaction of these factors appears to support the idea of career development as shaped by the interaction between individual and contextual factors (Ozbilgin, 2011; Patton & McMahon, 2006).

With regard to impeding factors, this research supports previous findings that found lack of support structures (Maxwell & Ogden, 2011; Pheko, 2014), relationships and work-life balance (Evers & Sieverding, 2014; Maxwell & Ogden, 2011; Pheko, 2014; Raburu, 2015; Yet-Mee, Peng & Yin-Fah, 2013). Further, participants in this research cited the role of economic and social factors (Austin & Cilliers, 2011) as working together in shaping their career development. Narratives of participants illustrated the dynamic interaction between the person and their environment (Patton & McMahon, 2006). This interaction was also complex as is manifest through the identified factors that impede career success illustrated in the participants' stories. Due to the nature of this complex and dynamic interaction as found in this research, this implies that career development is a non-linear process and one that is difficult to predict.

In dealing with the factors that impede career success, women also engage in a process of self-management (Savickas, 2011) in finding resolutions to their quest for career development. One way this was found to happen in this study was through lifelong learning (Braimoh, 2010), which brings into focus the role of distance learning. Similar to previous studies (Pheko, 2014), the role of education is highlighted in this study as aiding the career success of women. Distance education based on these participants' views occupied a pragmatic function that cannot be divorced from individual needs or the circumstances surrounding their life situation.

The study makes a number of contributions. Firstly, in studying the career success of women distance learners, career development is portrayed as a complex process that does

not follow a hierarchical approach as believed in traditional career theories. Thus, the findings of this research negate theorising espoused in career theories of career development as being reductionist and fragmented by viewing a holistic perspective of the lived experience (Joo & Park, 2010; Price, 2009). Secondly, this study contributes to our understanding of career success especially in a South African context (Koekemoer, 2014) by using an 'understudied' yet important sample group in South Africa: previously disadvantaged individuals (Schreuder & Coetzee, 2012, p. 2). Based on this study, solutions and interventions may be proposed, helping to expand understanding of career development (Savickas, 2011).

Thirdly, this study illustrates how career development processes are facilitated within a distance learning context (Burgess & Russell, 2003), including the contributing and impeding factors that affect career success amongst this cohort of the South African population. These include: financial constraints, the failure to be accepted into full-time universities, poor high school matriculation and individual circumstance, thus supporting previous studies (Lemmer, 2009; Pityana, 2009). In essence, distance education assisted the career development process with the individual acquiring a qualification or the skills to support this. Distance education also created a space not just for acquiring an education, but for mobility away from a life of disadvantage to a better one considering the individual situation and background in South Africa. This study has illustrated how these processes happen within a distance education context. Finally, this study has answered calls for studies investigating career experiences through the subjective lens (Chudzikowski, 2012) and seeking to understand career development not as a static, but as a dynamic process (Hirshi, 2011).

## Practical implications

Given that the majority of the participants in this study were career women, a practical implication from this study could be to devise interventions into how women balance life roles with not only their studies, but also employment. The focal point here should be on helping women not only through education, but also career development. This can also be important and prudent in informing policy efforts on a grand scale, especially amongst individuals working and studying at the same time. The desired goal here should not only be inclusion and access to education, but also the management of individual success through career development – especially for those previously disadvantaged in South Africa.

Another practical implication for this study is around the issue of striving for balance between study, work and personal and social commitments. There appears to be a paradox here. On one hand, this balance is needed and distance learning allows for it. However, it appears that maintaining such a balance places a great strain on the individual and a possible stumbling block. Career counsellors can assess their client's commitment towards this balance by drawing on the narratives (as illustrated in this study) and ascertaining

practical interventions around such an important construct. One useful way is to offer training courses targeted for distance learners in which aspects of life-balance are part of the training. In addition to this, and specifically with distance learners, it may be helpful to make those intending to enrol via distance learning aware of some of the potential challenges accompanying their enrolment, including striving for balance in the lived experience.

Trainers and organisational development practitioners can use narratives (as done in this research) for material development and training targeted for women. This can help relate practical and contextual real-life stories to concepts that can be viewed as abstract. In turn, this may not only inspire, but also help in proposing interventions that women can relate to. Given that the narratives and stories used in this research are context specific, this can allow trainers the opportunity to relate to not only the lives of career women, but also the performative dimension of careers and its complexity. This allows for trainers to identify with lives of career women used in this research as role models. The thinking here is that through teaching and learning from the lives of career women, one can re-story one's life.

## Limitations of the study

Although this study was helpful in understanding the factors that influence career success amongst a sample of women distance learners in South Africa, some limitations can be flagged. The sample size was not representative of the population of either previously disadvantaged individuals or women in South Africa. From the sample, only black and mixed race women took part in the research. This subsequently affects issues of generalisability. Furthermore, the participants were all distance learners from only a single province in South Africa (Eastern Cape). This again raises issues of generalisability from a geographical and modal system of education perspective. Furthermore, given the subjective nature of the study and that interpretation of participant data into themes was also based on the researcher's influence, the research is not bias free.

## Suggestions for future research

Future research could compare factors that influence career success across geographical locations and also include the full-time mode of learning. Furthermore, future research can also include male participants in its investigation of career success. All this can be done as a basis of comparison in relation to the findings of this research. The impact of the glass ceiling effect emerged as a finding in this research as also in previous research (e.g. Koekemoer, 2014; Pheko, 2014). Clearly there is a need to further unpack this concept. Future research could use various approaches and techniques in understanding the glass ceiling effect. These may include a quantitative survey approach in ascertaining the influence of the glass ceiling effect on objective and subjective outcomes of career success such as career satisfaction or job satisfaction. Also, a longitudinal study tracing the experiences of women

and their career development can provide useful insights on phenomena such as career success.

# Conclusion

This study places importance on understanding the role and influence of context and individual agency on career development processes and experiences such as career success. Thus, this study has highlighted factors that may contribute to or impede career success including the complexity of these on career construction in South Africa for women. The findings provide a basis for future research appealing to the academic and practitioner press, especially in using an 'understudied' (Schreuder & Coetzee, 2012, p. 4) yet important population cohort given the agenda of economic redress, social justice and equity. This forms a basis for theoretical and practical interventions.

# Acknowledgements

## Competing interests

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The publisher and the editorial board hope that this book will prove to be a valuable piece of knowledge for researchers, students, practitioners and scholars across the globe.

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