

Relocation Trauma: Fact or Fiction?

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ABSTRACT

The relocation attitudes and experiences of 420 mid and upper-level Ameritech managers were examined using data on such variables as financial consequences, effects on family, and marital status. Managers were also asked to recommend specific elements of a relocation program. As a result of these actions, Ameritech adopted several enhancements to the relocation plan, significantly increasing support for the spouse and elder care assistance in order to provide more overall support and increased flexibility for relocating managers.

Keywords: Relocation, Trauma, Financial Consequences, Effects on Family, Marital Status

INTRODUCTION

Controversy exists regarding whether relocation represents a golden career opportunity or a traumatic event that potentially stresses the family. In examining relocation attitudes and experiences among a sample of Ameritech upper- and mid-level managers, there was support for both positions. The majority of Ameritech managers who relocated appeared relatively satisfied with the results. However, the impact reported on the spouse/partner and his or her job was quite negative.

It is important to examine the impact of relocation not only because of the extent and cost of relocation but also because of the changing demographics of relocatees. The number of relocations has been increasing moderately in the last few years, and total annual costs are estimated to be \$15 billion. Organizations that are not concerned about increasing the positive outcomes of relocation for employees are likely to suffer the effect of employees becoming de-motivated and performing below their full capacity ("Spousal employment ...," 1989).

There are increasing numbers of spouse/partners employed full-time, and the majority of these are female. The term spouse/partner refers not only to spouses but also to significant others who may be affected by the move. The number of two-income families has been increasing steadily. Whereas two-income couples represented 51 percent of married couples in 1980, they composed 55 percent of married couples in 1985. It is estimated that by the year 2000, two-income couples will represent 63 percent of married couples. Also, transfers nationally are predominantly male (85 percent), but it is estimated that by the 2000, females will compose 24 percent of transferees (Cetron, Lucken, McFadden, & Weir, 1987).

There may also be a decline in willingness to relocate. This has been linked to the weakened psychological contract between employees and organizations. Stories of employees who relocated because of loyalty and then were later released when mergers and buyouts occurred affect employee attitudes about the value of loyalty. In the 1980s, it is estimated that one million managers lost jobs because of downsizing and takeovers (Stroh, Reilly, & Brett, 1990). Therefore, corporations cannot count on an acceptance to relocate based on organizational commitment. The organization will likely have to ensure attractive career advancement for the manager and provide relocation support for the family as well.

This study was initiated by Ameritech management to examine the impact of a relatively new executive development policy in the Ameritech system. The policy states that fourth-level (this is equivalent to a level below vice-president) and above managers are a corporate resource and, as such, their development and placement will be done on a corporate-wide basis. It further states the desire to develop managers by moving them between and within various business units both to broaden their understanding of the business and to assess their capabilities for managing in a variety of environments. This policy also benefits the corporation by expanding to region wide the pool of candidates to fill key positions.

Because of the geographical dispersion of jobs within the Ameritech five-state region, the consequence of this policy for managers is the need to relocate. Ameritech designed the study to determine the potential impact of this policy on the work and personal lives, including families, of the managers most likely to be affected. With an understanding of the impact, steps could be taken to lessen any negative effects via enhanced or modified support for relocating managers. Another factor that highlighted the need for the study was the perception of women's advocate and support groups within Ameritech regarding the policy's impact on the promotional opportunities for women who may be less mobile than their male counter parts. This study accordingly tested the reaction of executives

and managers to the new policy, listened to their recommendations regarding relocation, and responded with change as appropriate.

Table I shows the demographics of the sample. Of 593 questionnaires that were mailed, 420 were returned (a response rate of 71 percent). The sample was strongly weighted toward those who were more likely to be affected by relocation, that is, women and those who had high potential (these categories are not mutually exclusive, of course), as well as those at higher levels. Second-level managers, who are only a level above supervisors, were also sampled since they serve as a feeder group for the mid-level (third) manager group.

Feedback from non-respondents suggested that many of these managers felt that the return of their questionnaires would not be relevant for the organization since they were close enough to retirement that relocation would not be likely. This article will also describe the relocation experiences of ninety individuals in the sample (seventy men and twenty women) who had relocated in the past five years.

Table I: Characteristics of the Sample

Characteristic	Frequency (%)
<i>Sex</i>	
Males	72
Females	28
<i>Race</i>	
Whites	84
Blacks	13
Other	3
<i>Level</i>	
Second	16
Third	52
Fourth	22
Fifth	10
<i>Potential</i>	
Ready now for the promotion	26
Ready in future for promotion	23
Not high potential	51
<i>Marital status</i>	
Married	87
Men	95
Woman	77

Single	6
Divorced/separated	4
Engaged to be married/involved in significant relationship	3
<i>Spouse/partner Employment (N = 365)</i>	
Male spouse/partners employed full-time	87
Mean income = \$59,500	
Female spouse/ partners employed full-time	33
Mean income = \$37,600	
<i>Dependents</i>	
Had children 18 years old or younger	91
Had adult dependents	28
<i>Individuals Who Had Relocated in the Last Five Years</i>	
Men = 70	
Women = 20	

Note: 420 respondents (593 questionnaires sent; response rate = 71%).

CONCERN WITH THE POLICY

Table II indicates that although most managers were familiar with the policy, they desired more information about the consequences of the policy. Concern was expressed that being unable to relocate might reduce the likelihood of being promoted even within their current geographical area. Most managers believed, however, that if they refused a job offer requiring relocation, other offers would still be made in the future.

Some representative comments about the policy are captured in the following quotations:

The inter-entity movement program appears to be inconsistent with the trend and policies in other companies and with the changing values of managers.

The inter-entity movement program puts a high burden on women. Has anyone considered, wittingly or unwittingly, that the plan creates even more serious obstacles for women to advance?

It seems to me that in order to stay in touch with... employees (that is, working moms, second incomes, dependent parents), the movement system needs to be very sensitive and flexible or the corporation will not see the talent that is in front of them.

WHY A RELOCATION OFFER WAS ACCEPTED OR REFUSED

Sixty-two percent of those returning questionnaires agreed that they would relocate for a promotion, whereas only 14 percent would relocate for a lateral position.

Table II: Perception Regarding the Inter-entity Policy

Statements	Percentage who agreed
Those who are unwilling or unable to relocate will be at a disadvantage for local promotions	77
I am very or somewhat familiar with policy	71
Movement provides opportunity to achieve career goals	61
I would like a much better understanding of policy	53
If one refuses a relocation offer, one will not be asked again	21

If the position is a promotion, there is the attraction of increased competition, status, and the recognition of personal value from the organization. Learning new skills and facing new challenges are also tempting (Feldman & Brett, 1985). Some quotations that describe these interests are "Progressing in the business and reaching my full potential is extremely important" and "If financial incentives were attractive and the geographical area relatively attractive, I would relocate."

The question is whether a promotion is enough. Differences were examined between those who in the past had accepted and those who had refused a relocation offer. When asked to describe why they refused a relocation offer, the most frequently cited reasons were financial and the spouse/partner and his or her job. This is supported in other research suggesting that major concerns about relocation were cost of living, especially housing, in the new area and employment conditions for the spouse/partner (Mathews, 1984). It will be very expensive for a family if the spouse/partner has to be without a job for some period of time. Even a promotion may not make up the difference in income.

Table III indicates factors that predicted or did not predict relocation, based on differences between those who accepted ($N = 90$) and rejected ($N = 75$) a relocation offer. Some of these results may be counterintuitive. It is often suggested that older managers will be less interested in relocation or that children who are preschool or of high school age will impede a family's ability to relocate. Neither was true in this sample of managers. In regard to children, 62 percent of managers without children were willing to relocate, and 55 percent of managers

with preschool children and 65 per cent of managers with children in high school were willing to relocate.

The decision to relocate was not affected by the manager's marital status, the spouse's employment status, or the income of the spouse. Single men and women were similarly willing to relocate (69 percent of the single men were willing to relocate as were 67 percent of the women). These percentages are only slightly higher than the total sample's willingness to relocate, so it is important not to assume willingness to relocate simply because an individual is single. The following quote describes the dilemma: "I have the impression that the company believes a single person is more mobile than someone with a family. Excluding the obvious problems of school changes and spouse employment, a married person takes a unit with him or her to the new area . . . thereby retaining a high degree of stability and support. A single person has to start from scratch." Also, children living with one parent now represent one in five families; by the year 2000, this type of household could represent one in four families (Cetron, Lucken, McFadden, & Weir, 1987). If the single parent has been divorced, mobility may be restricted by the custody arrangements.

Table III: Factors Influencing the Decision to Relocate

No Effect on Decision	Effect on Decision
Marital status	Sex of employee : 36% of women accepted (56 offers) while 55% of men accepted (126 offers)
Age	Presence of an older adult dependent
Spouse income	Belief that spouse was willing to relocate: If belief negative, 53% refused offer and 19% accepted
Age of children	
Employment status of spouse/partner (Part- or full-time)	

In our sample, more spouses were employed full-time at lower management levels:

Fifth level	37%
Fourth level	42%
Third level	48%
Second level	70%

Managers at the lower levels, of course, tended to be younger and more were females. This is a clear indication that in the future relocation will be increasingly

an issue of moving professional women, whether the woman is an employee or a spouse/partner. Increasingly too, trailing male spouses will be an issue. These quotes are representative of concern about the spouse/partner's career:

I don't want to lose my spouse's income. Why sacrifice her career for mine?

Attitudes toward relocating to another town are a remnant of the era when the man told a wife to pack up and follow. That's not today's reality.

Although 39 percent of female spouses in the United States are employed, the majority are in clerical or relatively low-paying professions such as teaching or nursing. The majority of these jobs are reasonably mobile, although teaching positions may or may not be available depending on the geographical area (Cetron, Lucken, McFadden, & Weir, 1987). However, women are increasingly found in managerial and professional positions, and relocation will present career dilemmas. These careers may not be so easily transferable both because of the lack of appropriate jobs in the new area and also because of the difficulty of leaving a current job that is satisfying.

Women were less willing to relocate for a promotion (46 percent) compared with men (67 percent). Fifty-nine percent of married men whose wives worked full-time were willing to relocate, whereas only 35 percent of married women whose husbands worked full-time were willing. One study found that wives are less of a constraint on relocation for men than husbands are for women, even if women are professionals (Deitch & Sanderson, 1987). A long-term study of managers' careers suggested that although male and female managers are more similar than dissimilar, women may be different in that they will have to deal with sexism and family-career conflicts (Howard & Bray, 1988). Relocation an issue in which family-career conflict plays a significant role. Women may be resolving this issue by considering the impact on the spouse/partner first. The following quote reflects this and the resulting conflict: "I can't move if it will destroy my husband's career and psyche. It looks like I can't get promoted unless I move. So much for the high potential they say I've got!"

An adult dependent was also a very strong determinant of acceptance or refusal of a relocation offer. Those with an adult dependent, such as an aging parent, indicate a significantly lower willingness to relocate (50 per cent) than those without such a dependent (69 percent). This is probably related to the lower willingness of women to relocate because women are much more likely to have primary responsibility for the adult dependent (Travelers Employee Caregiver Survey, 1988). It is noteworthy that 28 percent of the managers surveyed had an

adult dependent. With the aging of the population, this is a statistic that is also likely to increase.

In summary, using a picture of the current situation to project future employee attitudes and demographics suggests that resistance to relocation is likely to grow. Organizations must understand how employees might view a relocation offer and what factors will be used to evaluate that offer.

SATISFACTION WITH RELOCATION

The literature tends to describe problems the transferee will have on the job. The spouse/partner and children are viewed as less problematic. When a manager or professional relocates, he or she is often expected to adjust quickly to the new job and environment. Less social support and more anxiety are likely because of new and different responsibilities (Feldman, 1988). The individual may work longer hours to adjust to the new job and delegate more frequently to subordinates (Feldman & Brett, 1983).

Although the move may disrupt the spouse/partner and children, one study found that most spouses had positive attitudes toward moving again. Wives who had moved were more satisfied with their marriages and family lives than wives who had not moved. Children were reported to have more difficulties than the wives but also demonstrated stronger social skills as a result of the relocation experience. Adolescents had more trouble than younger children. Forty-eight percent of children age thirteen to eighteen had adjustment problems, whereas only 15 percent of those age six and younger had problems (Brett & Werbel, 1980).

Table IV presents satisfaction ratings for three separate dimensions of experience: job and organization, personal, and spouse/partner and family.

Table IV: Satisfaction with Relocation

Dimensions Explored	Percentage satisfied or very satisfied
<i>Jobs and organization</i>	
Support from new supervisor	77
flexibility of schedule	75
Extent felt welcome by organization	71
Receiving realistic information about new job	66
Feeling free to accept/reject job without pressure	64
Receiving information about organization's relocation policies	61

Having sufficient time to decided about relocation offer	61
Overall organizational support (financial, etc)	52
Receiving information about new community	41
<i>Personal</i>	
Adjustment to new job	86
Adjustment to new organization	84
Likelihood of reaching career goals	68
Personal happiness	58
Extent to which new company interested in career	53
<i>Spouse /Partner and Family</i>	
Children adjustment (N = 49)	73
Search for new home with family input	63
Children happiness (N = 63)	59
Closeness to family	52
Spouse/Partner's social adjustment (N = 71)	52
Spouse/Partner's social adjustment to a new job (N = 40)	43
Spouse/Partner's happiness (N = 71)	42
Ability to visit home when desired during transition/ move	38 32
Spouse/Partner's career (N = 50)	

Of the ninety relocatees, about half had been relocated with a promotion. One significant caution is that these perceptions are reported by the person who relocated, not directly by the spouse/partner or children. There are, however, some objective data available that will be discussed regarding the spouse/partner's job search.

Overall, 88 percent felt that the right decision had been made to relocate. Relocatees tended to feel fairly positive about the new organization, supervisor, and the welcome they had received. However, total organizational support was not perceived very positively and only 41 percent were satisfied with information about their new community. Some representative quotes are:

My cost of living was up and my income down. This was a lateral with no cost-of-living adjustment plus the loss of my spouse's job. [There is a] need for [a] cost-of-living and an adequate housing adjustment. I needed more assistance after the move; for example, a service to accept deliveries [and] deal with workmen who need access to the house while I'm at work. I also needed information on reliable services such as, day care, lawn service, accountants, cleaning services, and so on.

Recognition [is needed] that single people [with and without children] are moving. The current plans and expectations of upper management are that you are available to work immediately and someone else is handling the move for you. It is very stressful. There should be consideration of the need to relocate a dependent parent who needs assisted living or a nursing home environment.

In general, it appears that managers were relatively satisfied with personal issues. However, they perceived that their families had experienced negative consequences. Children appeared to fare reasonably well, but the spouse/partner's social adjustment, happiness, and especially career satisfaction were reported as quite low.

The statistics about spouse/partner employment present a bleak picture. Whereas 56 percent of the spouse/partners were employed before the move, more than half of this group did not seek employment within the first six months of the move. The reason most often cited for this was the perceived need for time to support family and personal adjustment.

Of the twenty-four spouse/partners who did search for work, approximately half found jobs within six months, one-fifth took more than six months, and almost one-third were still unemployed. Of those who had found jobs, 64 percent took jobs paying less than the former job, and 50 percent perceived the new jobs to be of lower quality than the former job. Although the numbers at this point are quite small, this clearly represents a significant concern. Quotations describing the relocation experience of spouse/partners include the following:

My wife's adjustment [was a problem]. We moved into a neighborhood of permanent residents. They didn't care about us transients.

There is currently no help given in finding new jobs for spouses. The husband of district-level woman I know is still unemployed nine months after their relocation, and it is ruining their lives.

If you can't feel good about where you live and work and what it provides for your family, it is difficult to concentrate on and feel good about the job.

Relocation resulted in her (my spouse's) dissatisfaction and a reduction in income for the family. If this company wants two-career families to move, they're going to have to make an effort to help find meaningful employment for the spouse (for example, introductions to good headhunters and companies that the spouse may be interested in).

Add child care assistance—not necessarily money, mostly advice, information, referrals, and alternatives. Show some competence in the area instead of blank stares.

This is an important issue. They have asked me to uproot my partner, risk my partner's income (which represented more than 50 percent of house hold income), and they do nothing.

There were few significant differences in satisfaction between the men and women managers who had relocated except that women reported being happier. Women also felt that their spouses were better adjusted to their new jobs than female spouses were reported to be. There were, however, only nine male spouses who relocated.

Table V: How Critical Organization Actions Related to Relocation Outcomes

Organization Actions	Measures of Satisfaction (Correlation Coefficient)			
	Personal Happiness	Spouse/Partner Happiness	Family Happiness	Satisfaction with Organization
No undue pressure to make move	.46	.43	.38	.27
Time to make decision to move	.34	.37	.27	.30

Organizational actions were examined to determine which might predict adjustment and satisfaction. Table V shows the most predictive factors that related to several measures of satisfaction. It is not necessarily true that less pressure to accept the offer and more time to decide whether to relocate will cause satisfaction later; however, the relationship is psychologically logical. Control by the individual over the decision may increase the likelihood that the employee will work hard to ensure that the decision works because he or she experiences personal responsibility for it. If the organization pressures the individual to accept relocation, it may be very easy for the individual to blame the organization for negative consequences and take less personal responsibility for a successful outcome.

RECOMMENDATIONS

A relocation policy and procedure should be defined by an organization's situation and demographics. A policy should ensure equitable treatment of employees. Allowing individuals to negotiate their own move can be unfair and certainly does not ensure that the most valuable employees will receive the best treatment. Without specific practices to identify and address needs, an organization cannot assume that individual needs will be met. Without help, the relocatee may not recognize what needs exist until the relocation is completed unsatisfactorily.

The organization should be aware that relocation may be considered a critical, and perhaps the most critical, career decision of a manager's life. It may represent a decision to commit more personal and family support to one family member's career than has occurred in the past. Personal career counseling should be available and, although obviously no promises can be made, the individual must be provided a long-term perspective about the impact of the relocation and the new position on future career prospects. If the organization is clearly attempting only to fill a position without considering the developmental implications for the relocatee, an offer is more likely to be refused, or if accepted, future opportunities are likely to be viewed with skepticism.

Many employees may not ask for help they need and yet will be angry about not being offered help. For example, only 13 percent of married female transferees currently request spouse assistance. It may be that employees are uncomfortable about asking because they feel that the assistance will be inadequate or because help is either not offered or offered informally (Cetron, Lucken, McFadden, & Weir, 1987). A manager in this study stated: "Transfer ring employees do not share all their problems with their bosses because it may be perceived as weakness. An effective third-party provided service could be purchased to help the relocating family. When properly provided, it would pay for itself by reducing lost time and productivity. Further, this service would help the whole family adjust and learn to accept and enjoy the new area." In formulating a policy, a choice must be made about the extent of the support that is considered financially viable and appropriate for the organization. Many organizations still feel no responsibility for family issues; however, this study suggested that the perceived dissatisfaction of the spouse/ partner is an important issue for relocatees.

It is critical that a company not write off a manager who indicates lack of mobility at any point in time. The passage of time will often change family conditions or constraints, and an offer refused two years ago might be accepted today. Even though a profile of an individual who is likely to refuse relocation

was presented in this article, this profile should be used only to understand employee concerns overall, not to develop a stereotype of an individual who should or should not be offered a relocation. Prediction is never perfect. There were several individuals in this study who relocated although they would not have been predicted to do so.

Also, if an organization asks women to relocate less often because of a higher refusal rate and a lower willingness in general to relocate, the results will be an artificial constraint on women's careers because mobility has little to do with performance or potential to advance. The organization may lose high performers because of frustration with mobility as a criterion for advancement.

As a result of this study, the following practices for relocation were recommended:

1. When an offer is made, there should be adequate time for decision making and no pressure from the organization to accept. There should also be adequate time for the relocation to occur. A national survey reported that the average time of a move was eight weeks from the offer to the relocatee's reporting to work (Cetron, Lucken, McFadden, & Weir, 1987). A more reasonable length of time is three to four months. Occasionally a sudden job opening must be addressed, but in general the organization should attempt to plan for projected openings before they occur.

To facilitate an acceptable decision, counseling should be offered, not only focused on the manager's career but also on the important issues and possible consequences of relocation for the family. Visits to investigate the job and area should include the spouse/partner and children.

2. After the decision to move is made, the organization should conduct an interview to assess individual and family needs. Referral services should be available, as well as extensive information or counseling about the geographical area (for example, schools, neighborhoods, possible involvement in religious and community activities, and commuting information). The entire family should be encouraged to participate in and be reimbursed for house hunting.

The needs assessment will help determine how a relocatee will use funds provided to address special needs. For example, the fund might be used to allow a spouse/partner to obtain specific job placement help or education. Employment assistance should be professional and as specialized as necessary. It may be necessary to address a variety of career concerns and job hunting skills. The fund could be used to relocate an elderly dependent or to obtain counseling or medical help

for children who have particular needs. Financial counseling might be needed to assess the best approach to deal with relocation issues, such as type of mortgage to obtain. Single parents might use the money to buy extra services to support the move itself.

3. The impact of relocation should be tracked to ensure that the entire family's needs have been met. Following up periodically after the relocation will also communicate concern for the career progress of the relocatee. If the manager is truly a corporate resource, developmental experiences such as relocation should be evaluated for their success in enhancing the corporate resource, as well as in enhancing the individual man satisfaction with his or her job and the corporation.

Policies and practices should be reviewed periodically to reflect the changing needs of the organization and the employees. For example developing issues would best be dealt with when they affect a small proportion of employees. A recommendation is that policy development should begin when 5 percent to 10 percent of the transferring work force affected so policy is in place before 15 percent of the work force is affected (Cetron, Lucken, McFadden, & Weir, 1987). One example of an issue will become more visible is that of commuting couples, who now represent 5 percent of all couples nationally. This issue may present special support challenges, such as how to determine equitable support for two residences and commuting costs.

In conclusion, relocation should be designed to be a rewarding developmental experience that pays dividends not only to the organization but also to the person and the family who relocate. The means used to accomplish these goals must change as rapidly as our society continues to change.

AMERITECH'S RESPONSE TO RECOMMENDATIONS

Ameritech responded favorably to the study's recommendations and made specific changes in its relocation practices. Particularly important in considering changes were the recommendations of employees. Those recommendations with the highest levels of concurrence are listed in Table VI.

Among the more significant changes, the company decided to increase significantly the dollar-amount reimbursement for spouse employment assistance.

Table VI: Supports Perceived Most Useful for Relocation

Measures of Supporting Relocation	Percentage who Agree or Strongly Agree Measure Would be Helpful (N = 17)
Flexibility of schedule when relocating	95
Specific information about community	94
Support/feedback from new boss when starting the job	91
Timing the move to minimize family disruption	84 (N = 384)
Information to clarify new job	82
Employment help for spouse/partner	74 (N = 305)
Career counseling for spouse/partner	68 (N = 290)
Workshop/information on making relocation decision	65

Add an option to allow spouses to receive tuition reimbursement in lieu of employment assistance. This option was added for spouses who were electing not to return to work immediately after relocation.

Establish a "special care/accommodation" allowance to assist in expenses incurred for elderly or disabled dependents at the new location.

In addition to these specific changes, other changes were made that had the effect of giving increased consideration and flexibility to relocating managers. Finally, Ameritech is initiating a process of individual follow-up of managers and families who have been relocated to determine critical adjustment factors. This is to enable the company to stay in tune with the impact relocation is having on the lives of these employees and to assist in modifying its relocation policies and support in response to changing needs.

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