

Corporate Transfer Policy. Comparative Reaction of Managers and their Spouses

Les politiques de déplacement des entreprises : réaction des directeurs et de leur épouse

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Article abstract

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Corporate Transfer Policy

Comparative Reaction of Managers and their Spouses

Craig C. Pinder

This study examines the relative importance of specific transfer policy provisions in determining overall transfer policy satisfaction; the similarities and differences between managers and their spouses in terms of their attitudes concerning these specific provisions, and age differences among managers as they correlate

Recently, there has been some concern on the part of personnel managers over the growing reluctance of managerial, professional, and technical employees to accept transfers which involve relocating the family and the home.¹

It may be a specific rejection on the part of certain employees of the «mobile» life, or it may be just one manifestation of a more general decline of the «Protestant Work Ethic» which, in the past, dictated that young managers should come and go as their companies required. Alternatively, the new reluctance to move may be a manifestation of a more general rejection among younger people of managerial values and

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¹ «The case against executive mobility», *Business Week*. October 28, 1972, p. 110; «Fewer executives are being transferred», *Industry Week*. January 29, 1973, 176, p. 26; «More executives refusing transfers», *Industry Week*. November 19, 1973, 179, p. 26; J. PERHAM, «Is management mobility obsolete?», *Dun's*, 1970, 96, July, 46-48; L. TIGER, «Is this trip necessary?», *Fortune* 1974, September, Vol. 90, 139-141, 182. «Why moving day comes less often now for executives.» *U. S. News & World Report*. January 13, 1975. «New managerial attitudes on geographic mobility», *The Canadian Personnel and Industrial Relations Journal*, 1976, 23(4), 33-42.

corporate life.² Regardless of the causes of the rejection of the transfer as a way of corporate life and success, many organizations may soon be facing shortages of broadly trained and experienced managers to move into the positions now being vacated by retiring executives.³

In recent years, companies have tried to counteract the reluctance to transfer by offsetting some of the costs formerly incurred by the transferee and his or her family. Provisions for easing the financial (and other) setbacks caused by moving are becoming common among companies whose managerial development programs involve considerable use of transfers.⁴ Several studies have focused on the financial and human costs of corporate transfers⁵ although, to the knowledge of this writer, there have been no empirical studies of the comparative importance of the various provisions (made by organizations to offset transfer costs), for the attitudes of transferred employees and their families.

In view of the necessity for transferring organizations to maintain positive transfer-related attitudes among their employees, and in view of the large amounts of money organizations are spending to meet the many direct (and indirect) cost of transfers, it seems worthwhile to study the role of specific transfer policy provisions in determining employee transfer attitudes. Moreover, considering the fact that transfers have an impact on the lives of the employee's family⁶ and in view of the growing importance of the spouse in determining the employee's at-

² J. B. MINER, «Changes in student attitudes toward bureaucratic role prescriptions during the 1960's», *Administrative Science Quarterly*, 1971, 16, 351-364; J. B. MINER, «Student attitudes toward bureaucratic role prescriptions and prospects for managerial talent shortages», *Personnel Psychology*, 1974, 27, 605-613; D. A. ONDRACK, «Examining the generation gap — attitudes toward authority», *Personnel Administration*, 1971, 34, 8-17.

³ Canada Dept. of Manpower and Immigration, *Canadian Occupational Forecasting Program: Forecasts of Occupational Demand to 1982*. Ottawa, Information Canada, 1975.

⁴ *Administrative Management*, «96% of firms pay total moving costs for personnel», October, 1968, 60-61; C. HUGHES & K. ZIMMER. «80% of firms aid employees who move». *Administrative Management*, 1967, 28, 64-66.

⁵ W. A. JAFFE, «To move, or not to move (employees)», *Industry Week*, January 31, 1972; T. J. MURRAY, «The trauma of the transferred executive», *Dun's*, May, 1971, 40-43; «Taking the jolts out of moving», *Nation's Business*, November, 1973, 36-38; J. PERHAM, «Is management mobility obsolete?», *Dun's*, 1970, 96, July, 46-48; L. TIGER, «Is this trip necessary?», *Fortune*, 1974, September, Vol. 90, 139-141, 182.

⁶ R. SEIDENBERG, *Corporate Wives — Corporate Casualties?* AMACON — A Division of American Management Association, N. Y., 1973.

titudes and career decisions⁷, the reactions of employees' spouses to corporate transfer policies are also worthy of study.

Therefore, the purpose of the present study was to examine: a) the relative importance of specific transfer policy provisions in determining overall transfer policy satisfaction. b) the similarities and differences between managers and their spouses in terms of their attitudes concerning these specific provisions. c) age differences among managers as they correlate with attitudes concerning transfer policy provisions.

METHODOLOGY

This study is part of a larger investigation of the role of transfers in management development in three large Canadian firms (herein referred to as Company A, Company B, and Company C). Two of the companies are department store retailers (B and C) while the third is in the petroleum industry. A questionnaire was developed on the basis of interviews conducted with several personnel managers in industries where extensive use is made of transfers in manpower staffing and development programs. Included in the questionnaire were items pertaining to transfers and transfer-related problems reported by Glueck⁸, Burke⁹, and Pahl and Pahl¹⁰. A second questionnaire was also developed, the items for which were drawn almost entirely from the first, and the purpose of which was to tap the managers' spouses' reactions to transfer-related issues.

Samples of 100, 100 and 95 subjects were randomly drawn from the populations of managers who had been transferred at least once while working for Companies A, B, and C, respectively. A preliminary letter from the author, as well as one from a senior personnel executive from each company was mailed to each subject one week in advance of the mailing of the questionnaires. These letters explained the purpose of the study and the benefits potentially gained by the company and by industry in general. The letters also guaranteed the anonymity and confidentiality with which the data were to be treated, and stressed that

⁷ J. M. PAHL & R. E. PAHL, *Managers and Their Wives*, Hammondsworth, Middlesex, England: Penguin, 1971.

⁸ W. F. GLUECK, «Managers, mobility, and morale», *Business Horizons*, 1974, 17, 65-70.

⁹ R. J. BURKE, «Quality of Organizational life: The effects of personnel job transfers», *Academy of Management Proceedings*, 1972, 242-245; R. J. BURKE, «Personnel job transfers: Some data and recommendations», *Studies in Personnel Psychology*, 1974, 6(1), 35-46.

¹⁰ H. A. WITKIN, R. B. DYCK, H. F. FATERSON, D. R. GOODENOUGH, and S. A. KARP, *Psychology Differentiation: Studies of Development*, N. Y.: Wiley, 1962.

participation on the part of the individual employee and his (or her) spouse was voluntary. The second mailing contained the two questionnaires, a second brief explanation of the study by the author (including a request that the employee and the spouse complete their respective questionnaires independently), and a stamped envelope addressed to the author. Two follow-up letters were mailed at intervals of one week to all subjects. Subjects were repeatedly asked not to sign their questionnaires, in an attempt to gain frank and reliable responses.

Altogether, 196 useable sets of questionnaires were returned, representing 59%, 67% and 73% response rates for A, B, and C, respectively, or an overall response rate of 66%. For the purposes of this analysis, the responses from the three companies were combined.¹¹ The mean age of the responding managers was 37.8 Years (S.D. = 8.9 yrs). Seventy-four percent of the managers had at least some post-secondary school education (54.5% of them held college degrees). Eighty-four percent of the managers responding were male, and 84% of the respondents had spouses who returned usable questionnaires (n = 164). The mean number of times the managers had been transferred (by all former and present employers) was 3.58 (S.D. = 3.05). The mean number of transfers experienced by the managers while working for their present employers was 2.88 (S.D. = 2.17). The mean age of the spouses was 36.1 years (S.D. = 8.6 yrs.), and 55% of them had at least some post-secondary education (23.5% held college degrees). The average time since the transfer was 25.9 months (S.D. = 15.4 months).

Procedure

Both managers and spouses were asked to indicate on a five-point scale ranging from 5 (Very Satisfied) to 1 (Very Unsatisfied) the degree to which they were satisfied with the level of assistance their respective companies had provided them in terms of the fourteen assistance provisions listed in Table 1. Appearing in Table 1 along with the means and standard deviations for each of these items, are the intercorrelations between the satisfaction ratings given by husbands and wives for each provision. These intercorrelations reflect relative inter-spouse agreement about satisfaction with each of the fourteen provisions. Subjects were

¹¹ Respondents from the two industries studied were compared in terms of key demographic characteristics (such as age, age when transferred, salary, overall satisfaction with the companies' transfer policies, and size of the new location). No significant differences were found. However, respondents from the petroleum industry were found to have higher mean salaries (\$20,433 vs. \$17,238 $p < .001$) and somewhat more transfer experience with their present companies (3.53 vs. 2.53 transfers on average) than respondents from the retail industry.

also asked to respond to the question: « Overall, how satisfied are you with your company's transfer policy? » Response alternatives ranged from 5 (Very Satisfied) to 1 (Very Unsatisfied). This item served as the major dependent variable with which ratings of satisfaction with the 14 individual policy provisions were correlated. Descriptive statistics for this item appear in the bottom row of Table 1.

TABLE 1
Descriptive Statistics Relating to Satisfaction With
Transfer Policy Provisions

<i>TRANSFER PROVISION ITEM</i>	Manager		Spouse		r	n
	\bar{x}	σ	\bar{x}	σ		
1. Travel Allowances to Look for New Home	4.45	.87	4.44	.81	.32	163
2. Temporary Living Expenses at New Location	4.55	.67	4.53	.63	.18	160
3. Travel Allowances to Old Location after Move	4.07	1.10	3.67	1.24	.29	123
4. Allowances to Move Family/Household Goods	4.67	.54	4.69	.52	.20	162
5. Assistance in Finding New Home	3.45	1.19	3.51	1.22	.43	148
6. Assistance in Selling Old Home	4.08	1.13	4.15	.97	.48	148
7. Time off to Move	4.04	1.03	3.74	1.16	.23	155
8. Purchase Agreement if can't Sell Old Home	4.02	1.11	4.11	.98	.48	143
9. Financial Assistance in Buying New Home	3.04	1.34	3.37	1.24	.47	133
10. Payment of Closing Costs on New Home	4.29	.96	4.18	.94	.53	146
11. Payment of Decorating Costs in New Home	3.93	1.05	3.93	1.00	.43	154
12. The Raises Given at Time of Transfer	3.25	1.26	3.41	1.17	.67	158
13. Payment of Differences in Mortgage Rates	2.24	1.21	2.50	1.18	.67	120
14. Time to Prepare for The Move	3.73	1.06	3.69	1.10	.39	164
Dependent Variable: Overall Satisfaction With the Company's Transfer Policy.	3.82	.99	3.87	.94	.51	162

To study the relative importance of satisfaction with each of the assistance provisions in determining the individual's overall policy satisfaction, five analyses were conducted. First, using the data from the complete sample, managers responses to the fourteen provision satisfaction items were factor analyzed (using principal components analysis with an orthogonal rotation). This analysis suggested that four basic groups of provisions underlay the fourteen items. The first factor (which was by far the most important, accounting for 29% of the total variance) consisted of items relating to direct moving and relocation assistance (such as travel allowances to look for the new home and to the old location after the move; temporary living expenses at the new location; assistance in the actual moving of the family and household

goods, and so on). The second factor was made up of company provisions to sell the family's old home, and to buy it if it proved difficult to sell. The third factor related largely to the amount of time allowed to prepare for, and to make the move. Raises given also appeared on this factor.

The final factor is best described as satisfaction with large-scale, long-term financial assistance such as raises given at the time of the move, the payment of differences in mortgage rates between the new and former locations, and financial assistance in actually buying the new home. The loadings of the 14 items on the four managerial factors appear in Table 2. T-tests of the differences between the mean factor scores in the two industries were not significant in the case of any of the four factors.

TABLE 2
Pearson Correlations Between Satisfaction with Specific Policy Provisions and Overall Transfer Policy Satisfaction Among Both Managers and Spouses

<i>TRANSFER PROVISION</i>	Managers (n = 196)	Spouses (n = 164)
1. Travel Allowances to Look for New Home	.17	.14
2. Temporary Living Expenses at New Location	.21	.15
3. Travel Allowances to Old Location After Move	.19	.19
4. Allowances to Move Family/Household Goods	.22	.10
5. Assistance in Finding New Home	.28	.26
6. Assistance in Selling Old Home	.33	.26
7. Time Off to Move	.30	.25
8. Purchase Agreement if can't Sell Old Home	.45	.28
9. Financial Assistance in Buying New Home	.43	.32
10. Payment of Closing Costs on New Home	.38	.16
11. Payment of Decorating Costs in New Home	.41	.26
12. The Raise Given at Time of Transfer	.34	.47
13. Payment of Differences in Mortgage Rates	.32	.51
14. Time to Prepare for The Move	.33	.12

Our second analysis used multiple correlation with factor scores based on the factor analysis reported above as independent variables, and overall policy satisfaction as the dependent variable. First however, we randomly divided the sample of 196 managers into two subgroups to permit cross-validation of the multiple correlation analyses.

The results of this analysis indicated that Factor 4 (long-range financial assistance) was the most important predictor of our measure

of overall transfer policy satisfaction; followed in order by Factors 2, 3, and 1: (buying and selling provisions, time allowances, and short-term relocation assistance, respectively). In the first subsample ($n = 62$), these four factors accounted for 44% of the variance in the dependent variable. These results were replicated in the second subsample, where the factors entered the prediction equation in exactly the same order, and yielded an R^2 of .43.

The third and fourth analyses were similar to the first two, but were focused on the responses of the managers' spouses. A principal component factor analysis of the fourteen provision satisfaction items among the spouses revealed only one major factor. In other words, the attitudes among the spouses with regard to the various items tended to go hand in hand: the spouses did not seem to differentiate very highly among their satisfactions with the various specific provisions. Consequently, we simply computed multiple correlations between the fourteen predictors and the overall policy satisfaction item, within each of the two subsamples of spouses (which corresponded directly to the two subsamples of managers).

The results of this analysis showed that, in the first subsample ($n = 49$), the following four individual provision satisfaction items predicted overall policy satisfaction with an R^2 of .45: Payment of differences in mortgage rates, travel allowances to look for a new home, purchase agreement if the old home is unsellable, and the raises given at the time of the transfer. These four items were cross-validated in the second subsample of spouses ($n = 55$), and were found to be stable. R^2 with these four satisfaction variables was .45 although the relative importance of the four predictors was not *completely* the same in the second group as in the first.

Notice that although the spouses' data did not reveal the existence of any major factors of provision satisfaction, the four most important items came from three of the factors which emerged in the managers' data. Payment of the inter-location differences in mortgage rates was the most important predictor of overall satisfaction among both spouse subsamples and was a major item in Factor 4 in the managers' data (the first factor in the multiple correlation analysis among the managers). Similarly, payment of travel allowances to seek a new home loaded on Factor 1 of the managerial data; purchase agreement loaded on the second managerial factor; and finally, the raises given loaded on their fourth factor. Hence, although the spouses' specific provision satisfactions did not covary in stable patterns, as was the case among the

managers, relatively high prediction of overall satisfaction was attained by knowledge of the spouses' specific satisfactions on four separate provisions that came from three of the four factors in the managerial analysis. In short, diverse forms of assistance were seen as important by both managers and their spouses, but in both cases provisions for long-range financial assistance were seen as most important.

The final analysis conducted was an investigation of age as a correlate of satisfaction with policy provisions. It was found that factor scores on the first major policy provision factor (short-term provisions for moving and relocation assistance) correlated positively with managerial age ($r = .28$; $p < .001$), but that age was unrelated to each of the other three provision satisfaction factors.

DISCUSSION

In view of the fact that the spouses of managers who are transferred are increasingly more likely to have careers of their own, and to the extent that couples share in the key decisions concerning a manager's career, it becomes important to consider the salient facets of the transfer policy satisfaction of both members of a family which might be transferred. (In this study, 34% of the spouses had jobs of their own before the transfer, and 63% of the managers reported that their spouses had considerable input into the decision to accept the transfer.)

As shown in Table 1, there was considerable correspondence between the managers and their spouses in terms of satisfaction with specific provisions of their companies' transfer policies. This is reflected both in the general closeness of their mean ratings, and in the consistently high inter-spouse correlation coefficients. Of course, such correspondence of attitudes is not surprising, considering the mutuality of the experiences couples have when undergoing a move, and the sharing of reactions that normally takes place at such times within couples.

There were some exceptions however, as in the comparatively low inter-spouse correlations on items 2, 3, 4, and 7. Further, the differences between the mean satisfaction ratings were highly significant in the cases of Item 3 (travel allowances to old location, after the move), $t = 2.83$, $p = .005$; Item 7 (time off to move), $t = 3.28$, $p = .001$; Item 9 (financial assistance in buying new home); $t = .008$; Item 12 (raises given), $t = 2.15$, $p = .03$; and Item 13 (payment of differences in mortgage rates), $t = 3.34$, $p = .001$.

It is interesting to note in Table 1 that, in general, the managers were less satisfied than their spouses with their companies' provisions

for certain long-term housing-related adjustment provisions. (Compare the means for items 9 and 13 — financial assistance in buying the new home, and payment of differences in mortgage rates, respectively.) On the other hand, the managers tended to be more satisfied than their spouses with some of the more short-term considerations, such as Item 3 (travel allowances after the move), and Item 7 (time off for the move). Table 1 also suggests that the spouses were less satisfied than the managers themselves with the raises received at the time of the transfer ($t = 2.15$; $p = .03$, two-tailed). In view of the fact that 57% of the managers viewed their transfer as a promotion, we might explain the differential satisfaction with raises in terms of the nonmonetary rewards the manager gains by a transfer/promotion, but which are not shared by the spouse (such as the increased status, recognition, responsibility, and autonomy that usually accompany a promotion). Not being able to benefit directly from these intangible compensating factors, spouses may place more importance on salary increments to compensate for the costs and inconveniences of moving.

Aside from these differences in relative satisfaction with specific items, it is also interesting to note the similarities and differences between the managers and their spouses in terms of which policy provisions were most instrumental in predicting overall satisfaction with the companies' transfer policies. Both long-term and short-term considerations entered into the regression equations predicting overall policy satisfaction on the part of both managers and their spouses, although the long-range items such as the payment of any differences in mortgage rates between the former and new locations (which can be significant after only a few years since the first mortgage was established) were most important for both groups.

Such liberal real estate-related provisions are becoming increasingly common among large, transferring employers.¹² Each of the companies studied here featured most of these provisions in their transfer policies, although it is not possible to report whether all of the respondents received the benefit of all of these new provisions, since the time since the last transfer varied considerably from family to family, and we did not determine exactly which provisions were in force at the time of each actual transfer.

On the other hand, raises given and sufficient time also figured prominently as predictors of overall policy satisfaction among both

¹² K. B. WONG and J. G. HALPIN, *Relocation Policies and Practices in Canada*, N. Y.: The Conference Board in Canada, 1977.

managers and spouses. An important implication of these results is that although companies may be spending more time and money on the sorts of avant-garde real estate assistance provisions shown in Table 1, two very basic provisions still seem to be crucial in determining overall attitudes toward the company's transfer policies: the time allowed to prepare for the move, and the raises given with the transfer. Burke reported similar results in his study of transferred engineers.¹³

The principal components analysis suggested that the managers (among whom four satisfaction factors emerged) were differentiating more highly among specific policy provisions than were their spouses. The higher differentiation of the managers (most of whom were male) might be explained by the often-observed sex differences in cognitive style (such as in differentiation, as discussed by Witkin¹⁴) or by the fact that as a group, the managers were more highly educated than the spouses. A better explanation, however, rests in the fact that the managers reported a higher average level of understanding of their companies' transfer policies than did the spouses. A single item on the questionnaire asked: «How well would you say that you understand your (spouse's) company's transfer policy?» A response format ranging from 1 (Not at All) to 5 (Extremely Well) was provided. The mean response among the managers was 4.47 (S.D. = .77); the mean among the spouses was 3.94 (S.D. = .98). This difference was found to be statistically significant ($t = 6.29$; $p < .0001$). Therefore, we might conclude that their higher degree of (reported) understanding of their companies' transfer policies and provisions resulted in a more sophisticated, more highly-differentiated attitudinal reaction among the managers than among their spouses. As spouses become more involved in determining the family's reaction to being transferred, it may become more important for organizations to make their transfer policy provisions more familiar to their managers' spouses.

The results of the analysis of age as it predicted provision satisfaction suggest (although this is only speculation) that older employees (who have been transferred more often than younger employees) may be more satisfied with their companies' short-run relocation provisions than younger employees because of the liberalization of these provisions since they (the older managers) first began their mobile careers. That is, it may be that the recent increases in compensation for transfers provided to managers make these provisions seem more generous now

¹³ R. J. BURKE, *ibid.*

¹⁴ H. W. WITKIN et al., *ibid.*

¹⁵ WONG & HALPIN, *ibid.*

than they were years ago, such that older managers who became used to the more limited provisions of the past view present policy provisions more favorably than younger managers who do not have the same time perspective. On the other hand, the lack of correlation between age and satisfaction with the longer-term provisions (such as real estate-related provisions) might be explained by the relatively recent emergence of such provisions, so that they are almost equally novel to younger and older employees.

CONCLUSIONS

The research reported here can be described as only exploratory and suggestive, since little prior empirical work has been conducted on this topic. Moreover, this work was extremely empirical in nature, lacking the useful direction that theory can provide. There was little or no theoretical base from which we could operate. In fact, we cannot be sure that we included all of the usual provisions made by companies to offset the inconvenience of moving. Nevertheless, the major conclusion to emerge from this study is that managers may differentiate among, and hold varying attitudes toward at least four different types of transfer policy provisions. The simple reimbursement of the direct costs of moving may no longer be sufficient, therefore, to assure favorable attitudes toward the company's transfer policy. In addition, organizations must now also be willing to provide for several longer-term costs and considerations relative to a single move, let alone a career that features many, frequent moves. The present study has demonstrated the importance of some of these longer-term considerations (such as the handling of housing price and mortgage rate differentials) in determining employee attitudes.

Related to this point is the finding that, while they may not differentiate as highly as the employees do among specific provisions, corporate spouses (usually wives) hold somewhat different perspectives concerning the relative importance of transfer policy provisions. Spouses may be oriented more toward the payment of long-range costs (such as mortgage rate differentials) than even the managers were, in forming their overall attitude toward their companies' policies.

In short then, the continued liberalization of corporate transfer policy provisions that has been reflected in studies by the Conference Board in Canada seems indicated in order that personnel management officials can assure satisfaction among their transferring managers, thereby encouraging this increasingly-more-scarce manpower resource to continue to accept the transfer as a way of corporate life.

Les politiques de déplacement des entreprises : réaction des directeurs et de leur épouse

Cent quatre vingt seize employés (masculins) et leur épouse faisant partie de trois succursales de grandes entreprises canadiennes répondirent par correspondance au questionnaire se rapportant à leur attitude concernant leurs expériences durant la période de déplacement. Ce questionnaire comprenait des questions touchant sur la satisfaction personnelle de l'individu en rapport avec les plans de déplacement et les dispositions d'aide établies par les compagnies.

Des éléments d'analyse identifièrent quatre facteurs fondamentaux entre les attitudes des directeurs, mais seulement un facteur entre les épouses. Des analyses de régression multiples utilisant des coefficients de sureté furent employées pour examiner l'importance relative de satisfaction, avec plusieurs dispositions positives pour la satisfaction complète de l'individu, par rapport au plan de déplacement d'employés de l'établissement.

Les résultats suggèrent qu'en général les employés (masculins) furent moins satisfaits que leur épouse des dispositions offertes par leurs établissements pour les habitations à long-terme et des dispositions pour le coût. Cependant, les employés (masculins) ont tendance à être plus satisfaits que leur épouse avec les dispositions pour dépenses de relocalisations à courts-délais.

Les conséquences des plans de déplacement d'employés dans les grandes entreprises restent encore à être étudiées.

COLLECTION RELATIONS DU TRAVAIL

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