CHAPTER TWO

LITERATURE REVIEW: RELOCATION

2.1 Introduction

In this chapter a literature review is given of research done on the subject of relocation and its effects on the family. In view of the fact that research on the experience of officials of the South African Department of Foreign Affairs is to be undertaken, an extensive investigation into relevant literature was done in this chapter.Though there is a substantial body of research on relocation, many researchers (Ammons, Nelson & Wodarski,1982;Brett, 1982; Martin, 1996; Munton & West, 1994; Noe & Barber, 1993) considered the effects of domestic relocation only. Since the overlap between domestic and international relocation is relevant, both types of studies will be reviewed. This review constitutes a synopsis of most of the recent literature on relocation over the past three decades. The current literature refers mainly to American studies (Ammons et al., 1982; Brett, 1982; Noe & Barber, 1993;) and to a lesser extent European, especially British studies (Martin, 1996; Munton & West, 1995).

These studies seem to be based on research which is overwhelmingly empirical in nature. A veritable plethora of variables has been analysed and tested, individually, in relation to others, or considered in terms of a time-limited process. This has resulted in a large body of findings which seems to be difficult to structure in a meaningful and hopefully non-overwhelming way. Surprisingly few qualitative studies have been undertaken. Dunbar (1992) speaks of a dearth of evaluative research on overseas postings in terms of adjustment, satisfaction, and performance.

Based on the literature, the following aspects of relocation is discussed:

Defining relocation;

Changing attitudes to relocation;
The organization and relocation;
Relocation and the family;
An adjustment process for the family;
Determinants in adjustment;
Relocation and mental health; and
Coping strategies.

2.1.1 Definition

Relocation is simply defined as changing a residence and establishing a new address (Humke & Schaefer, 1995). This is a rather general definition covering domestic as well as international relocation. Although there may be similarities, international relocation is both qualitatively and quantitatively different from domestic relocation. For example, one is not often required to learn a new language or to learn to interact with a new culture when moving around within one's own country. Nor can the degree of disruption to a family that relocates domestically approach that which is experienced in a move abroad.

Starker describes relocation as

> "an unfolding complex experience rather than an acute isolated event" (p. 56, 1990).

One of the most important aspects of relocations seems to be the inherent stress that is involved (Adelman, 1988; Ammons, Nelson,& Wodarski, 1982; Schoeni, 1991; Pinder,1989). Burr (in McCubbin, 1979) defines a stressor event as one that produces a change in the family social system in terms of its boundaries, structure, goals and processes, roles and values.

International relocation involves changes in the physical and social milieu of the family. Work, school and lifestyle patterns are suddenly different for every

family member (Steinglass & Edwards, 1993). International relocation involves learning to live and function within a foreign culture (Church, 1982; Phalet & Hagendoorn, 1996) and building up a new social support structure (Adelman, 1988).

These definitions and descriptions imply that the entire family's functioning can be affected after a transfer and that the effects may not be immediately apparent.

Perhaps I could combine Starker (1990) and Burr's (1979) definitions by saying that international relocation represents an unfolding, complex experience that affects every aspect of every family member's life, individually and as a system, in the process of coming to terms with a different set of circumstances in various environments for a specific number of years.

2.1.2 A common phenomenon

In general it seems that relocation is a common phenomenon both in America and Britain. Mann, writing in 1972, refers to relocation as a "major certainty today". According to Luo and Cooper (1990) 800,000 people relocate annually in America and 250,000 in Britain (Institute of Manpower Studies, 1987). Starker (1990) says that 20% of the American population change residence annually. The data from Australia, Canada, Britain and Japan reveal similar figures (Stokols, Shumacher & Martinez, 1983).

No formal research quoting international relocation figures for South African diplomats, seems to be available. It is known that the Department of Foreign Affairs currently has eighty-nine diplomatic missions abroad and four hundred and eighty employees and their families are serving four year contracts at these missions. Other state departments, such as Defence, Trade and Industry and Home Affairs have three hundred transferred employees working under the

administrative aegis of the Department of Foreign Affairs within the same missions. Half of these missions are situated in the so-called undeveloped and developing world. (Source: Personnel Section, South African Department of Foreign Affairs, 1999).

To my knowledge, no formal research study has been undertaken to explore the experience of South African transferred officials and their families.

2.1.3 No single theory

Jones noted in 1973 that many of these studies have explored variables in terms of a general focus but have not been based on an accumulative theory. Indeed, no single satisfactory theory has been put forward to explain the phenomenon of relocation. Stokols and Shumaker (1982) advocate the adoption of a contextual approach as a framework for organizing a theoretically and empirically diverse literature. Such an approach should reflect the dynamic nature of adjustment processes and the fact that these processes occur within the total life context of the individual.

Werner, Altman and Brown (1992) argue that phenomena should be studied holistically, as simultaneously involving people, psychological processes, the physical environment, and temporal aspects. Furthermore, none of the aspects of adjustment can be understood except in relation to one another.

2.1.4 A social record

What has emerged is a social record of the past thirty years and more, some clarity about the effect of certain variables, some confusing and contradictory findings, and many unanswered questions. The changes in attitudes and values in society over time are clearly reflected in these articles and these changes are

yet another factor in determining the adjustment phenomenon following relocation.

It may be useful to look at the recent history of relocation in the wider context of the social changes that have taken place over the past thirty years.
In an age of democratic rights, children's needs are given more serious consideration than ever before in our history. Women are insisting on equality in the workplace and at home. Women who previously had to work for financial reasons are now insisting on the right to their own careers. As a result some employers are reassessing their policies and taking note of changes (Benjamin & Eigles, 1991; West & Rives, 1993).

2.2. Changing attitudes to relocation

An awareness of a changing attitude regarding relocation seemed to register in the last three decades of the previous century. Prior to this period , families did not relocate on a large scale. For the ones who did, wives were mostly homemakers who willingly accompanied and supported their husbands' careers. A male accompanying spouse did not exist yet. But the effect of globalisation, an appreciation of the interaction between work and family, the shift from single to dual career families, amongst others, brought about a shift in the attitudes towards relocation (Brown & Orthner,1990; Starker, 1990).

In this section the impact of such societal changes are discussed in terms of the new reality and subsequent to a growing awareness of the disruptive impact of relocation.

2.2.1 Moving is disruptive

Before 1970 it was generally accepted that most Americans adjusted relatively easily to moving. However, the negative effects had been underestimated

(Starker, 1990). In 1990, Luo and Cooper noted that during the previous ten years, the public had become more aware of the potential disruption of moving. Few families believed that moving was easy. It is a major logistical undertaking that involves renting out a home, decisions about packing up and storing possessions, the physical packing process, rearranging finances, leaving churches and other community ties, uprooting children from their schools, peers, and a way of life, and saying good-bye (Shahnasarian, 1991).

As early as 1972, Pachard described the American nation as "a society of torn roots" (Brown & Orthner, 1990). Stokols, Shumaker and Martinez (1983) question the social and personal costs of our increased freedom from geographical constraints. Mendendall and Oddou (1985) cite research findings of significant rates of premature returns of expatriate managers during the two decades leading up to the eighties. High financial costs are incurred as well as the "invisible" losses of self-esteem, self-confidence in managerial ability and prestige among peers.

Thus it seems that as more people relocate more often, the effects are becoming apparent. In this new climate, an awareness grew that an exclusive focus on the family's financial well-being could result in a neglect of the emotional needs of the individual members.

2.2.2 New balance between work and family

In the nineties a shift in focus from work to non-work activities took place. Many parents were no longer prepared to put the requirements of the workplace above the needs of their families. Cornille (1993) described a new social emphasis on interpersonal relationships over corporate advancement that put relocation in a new light. Kilgore and Shorrock (1991) as well as Bowen (1988) spoke of an awareness of a basic human need for balance between work and family. Bowen described work and family as "inextricably intertwined". Thus if a family has

adjusted well the official can be presumed to do his work well. The opposite will also be true.

2.2.3 From single to dual career families

In 1982, Brett wrote that the typical corporate move involved a male employee with a non-working wife and two children. In 1984, Bayes found that men were still the primary wage-earners even in dual-career couples (constituting 74% of all couples); their careers were given priority and spousal support was still a given. In the nineties, the majority of employees in industrialized countries are members of dual-career families (Kilgore & Shorrock, 1991; Shahnasarian, 1991).

Relocation becomes even more complicated for such families who have to decide whose career takes dominance and whether a commuter relationship is a feasible or wanted option. Shahnasarian (1991) suggests that the accompanying spouse who forsakes a job to accommodate a spouse's relocation, finds the experience more distressing than the employee. This situation led to the phenomenon of what became known as the "reluctant wife".

2.2.4 Female liberation and the "reluctant wife" .

In 1973, Jones found that women believed it was better to move than to endanger their husband's opportunities for upward mobility. A decade later, Donohue and Gulotta (1983) wrote that families who relocate subscribe to a unique value of putting the head of the household's needs first. It was culturally expected of women, at least up to the seventies, to be "compliant and cheerily accepting" of their husbands' job transfers (Starker 1990). Companies too have such an expectation from spouses (Kilgore & Shorrock, 1991).

By the nineties, the pendulum had swung around. Now Lundy (1994) questions the underlying assumption that a woman must adapt to her husband's relocation and that the vicarious experience of his career satisfaction will be sufficient for her. A new breed of women are juggling family needs with a pursuit of their own careers. They no longer necessarily comply with the traditional male dominant breadwinner role, but seek equal power in relationships based on economic independence.

We need to address the question of whether wives of today are still prepared to put their husbands' careers first?

Noe and Barber (1992) found that a spouse will be unwilling to relocate if it meant a drop in income, status or seniority, and doing less satisfying work. Spouses find it equally hard to move if they have been employed for a considerable period. Frye (1991) speaks of the phenomenon of the "reluctant wife." Some couples decide on a commuter relationship and in so doing postpone the relocation issue (Shahnasarian, 1991). Relocation remains hardest for career women who will often move mainly to maintain the relationship with a partner (Bayes, 1986). Furthermore the accompanying spouse of today is increasingly a male person (Lundy, 1994) (See also par. 2.6.4) who may have a different experience of being an accompanying partner as a woman would.

2.2.5 Company support for spouse employment

Some organizations in America seem to acknowledge the neglected role of the modern spouse, male or female. Given the current situation, companies today cannot overlook a spouse's employment situation, and some of the larger companies in America now provide assistance in the spouse's job search (Benjamin & Eigles, 1991; Rives & West, 1993). Shahnasarian (1991) goes even further and speaks of an "entitlement" to spouse relocation counselling services, standard in many leading American organizations. This has resulted in a new industry of relocation career consultants who provide assistance to spouses

(Benjamin & Eigles, 1991).

Frye (1991) mentions a growing appreciation of the needs of dual-career families and to concrete steps being taken in certain multinational organizations to help spouses find employment.

It seems easier to find employment after relocation if a spouse has transferable skills and a flexible attitude towards alternative and new options. Sometimes she or he may have to be prepared to accept a substantial drop in income (Kilgore & Shorrock, 1991). This seems especially true in the Third World where salaries are much lower than in First World countries.

International spouse relocation assistance can be a key to success if :

- it is individually tailored to meet professional and personal goals;
- it offers support where needed;
- begins before the move;
- provides job search strategy assistance; and
- continues until the spouse is involved in the new community;

(Benjamin & Eigles, 1991).

An obvious complication for spouse employment overseas would be local immigration laws that prohibit employment. A different language would also limit options (Kilgore & Shorrock, 1991). A further limitation in the case of employees of the South African Department of Foreign Affairs, is the nature of reciprocal agreements between governments that determine whether spouses are indeed at liberty to work or not. At present the Department of Foreign Affairs (DFA) has such agreements with a number of countries (Source: Personnel Section, South African DFA, 1999).

This means that spouses either have to comply or follow a career physically and geographically removed from one another. This may lead to frustration in the first

case and estrangement in the latter. Taking the above into account, the question is: can we now expect an increasing number of employees resisting postings abroad due to "actual or anticipated adjustment problems of spouse or children" (Noe & Barber, 1992) or due to possible threats to family stability due to relocation?

During the seventies and eighties an increasing resistance to relocation began to manifest itself (Frye, 1991;Noe & Barber,1992). Quoting a 1987 Institute of Manpower Studies survey, Munton and Forster (1990) found that 63% of managers were not willing to relocate because of family reasons. However, professional reasons for relocation seem generally to outweigh personal and family concerns (Brett, 1982; Brown & Orthner, 1990; Donahue & Gulotta, 1983; Fisher & Shaw,1994).

Personal attitudes are important too. Sanchez (1992) found, in a study of workforce entrants, that a person's level of independence - seen as a lack of family attachment - was the best predictor of willingness to relocate. Although resistance to relocation is not the main concern of this study, diplomatic families are not immune to societal changes and the impact of these changes are already seen in an unprecedented number of commuter marriages and rising levels of frustration among accompanying spouses. It could be part of the reason for a high divorce rate among diplomatic couples (Sanchez, 1992).

2.3 Relocation and the Organization

In this section the change in the relationship between employee and employer that takes place when the employee is abroad, is discussed. The problems that are experienced are referred to as soft issues and it seems that these are not always addressed satisfactorily.

2.3.1 A new relationship

Living abroad apparently results in a new relationship with one's employer. In the absence of an established social support network, the organization becomes the major source of information, one's link with the home country, and represents financial security. A state department determines how often and for what purposes one can visit home. It determines the type of housing to be lived in. It prescribes a certain code of conduct particularly in the case of diplomats who assume the role of representatives of their countries.

These are a few of the ways in which the organization assumes greater importance in the transferred official's life. It follows that the organization should assume greater responsibility for the well-being of its employees and their families. But the official often suffers from a lack of recognition once abroad, as he is "out of sight, out of mind" (Harvey, 1982). In this regard, Harvey suggests the implementation of a mentor program between an official and a person at the Head Office to provide a link during the stay abroad.

Organizations need to understand the impact of relocation on the individual and his family, the resulting patterns of adjustment for the employee, and the domino effect for the organization itself (Munton & West, 1995).

Companies should formulate policies to develop viable responses (Kilgore & Shorrock, 1991). "Solutions should incorporate motivational factors as opposed to hygiene factors such as allowances, increased pay and living accommodations". Harvey, (1982, p 54).

Steinglass and Edwards found that the more input adults have in the decision to relocate internationally, the better their subsequent adjustment (1993). Apart from organizational recognition of psychological motivation other than financial, these findings suggest a relationship between motivation, informed decision-making and eventual adjustment.

Furthermore an organization has certain *social expectations* and values which

are communicated to their employees and their families. The degree to which these expectations are accepted, as reflected in their behaviour, determines the family's ability to manage the stresses and demands of the organization (McCubbin, 1979). There is a difference between the social expectations of a diplomat and his family when he is abroad and when he is at his head office where his family is largely excluded from these expectations. The extent to which his family can comply with the new set of expectations will have a bearing on their adjustment. Apart from the new social expectations, families are confronted with adjustment issues that affect the quality of their personal lives.

2.3.2 Soft issues

Luo and Cooper state that organizations have paid little attention to relocation problems beyond that of financial support. Employees are generally given financial incentives to live in other countries. In countries where the standard of living is seen as lower, the employee is given a higher incentive (1990).

The appropriateness of a financial reward as compensation for adjustment issues can be questioned (Harvey, 1982). It seems that the more people complain about the specific hardships they have to endure, the more the organisation feels obliged to raise allowances. However, since specific problems are not addressed, complaints do not disappear and eventually employees earn the reputation of being grasping and complaining. The employee becomes aware of this negative epithet and his attitude towards his employer, and towards his work, becomes negative in turn. Researchers (Carlson, 1993; Deci, 1971) have discovered that extrinsic reinforcers (e.g. payment after a person has successfully completed a task) can often undermine intrinsic motivation (that is, the performance of a task that is rewarding in and of itself). This means that the intrinsic and loyal support of an employee in Foreign Affairs to his home country, may become compromised, making the person's task less positively reinforced, leading to dissatisfaction, changes in attitude and reduced adaptability.

Bayes (1986); Bowen (1988); and Kilgore and Shorrock (1991) speak of *organizational indifference* to the emotional and social issues of relocation. These psychological or "soft issues" are hard to quantify, often go unnoticed, and present the real cost to a company (Benjamin & Eigles, 1991).

The same authors maintain that the most difficult problems are not due to housing but to family and personal adjustment. One way of addressing the initial chaos, is that of permitting a newly transferred employee to spend the first week settling in with his family in order to help reduce the pressures of adjustment (Cornille, 1983), instead of trying to find his feet in a new office environment whilst his family has to cope by themselves in a foreign situation. Harvey (1982) suggests low costs solutions that include better communications, sensitivity to employee stress and better planning.

That is but one aspect of relocation being addressed. Similar problems can be addressed , i.e. by psychologists and other health professionals who can specify the aspects of relocation that are specifically demanding and the ways in which families attribute personal meaning to the crises they are confronted with. Steinglass and Edwards (1993) of the Ackerman Institute for Family Therapy, conducted a pilot study on "Risk and Resiliency Factors in State Department Families" . Their specific brief was to review research on family mobility, its consequences and mediators of the potential risk factors of mobility, and to make recommendations regarding provision of services for State Department employees and their families.

2.5 RELOCATION AND THE FAMILY

Relocation is an important life event that not only concerns the employee but his entire family (Luo & Cooper, 1990; Lundy, 1994), and involvement by all family members is necessary for a smooth transition (Benjamin & Eigles, 1991). Munton and Forster (1990) call for a more family-centred approach to address the unresolved practical and theoretical issues around relocation. Carlisle-Frank

(1992) cautions that research has shown that relocation is a complex phenomenon, and many contributing factors need to be considered when the effect on a person or a family is being assessed. Steinglass and Edwards (1993) mention both positive and negative effects on families who move every few years.

2.5.1 Stress

Hausman and Reed (1991) refer to relocation as *relo shock, relocation stress* or *the mobility syndrome*. Cornille, (1993) defines relocation as a chronic stressor event. Adults rated the intensity of moving as a stressor 28th out of 43 potentially stressful life events on The Social Readjustment rating Scale of Holmes and Rohe (Steinglass & Edwards, 1993).

The more severe the stress, the higher the probability that family unity and stability will be disturbed. The more disruption relocation involves, the worse for the family (McCubbin, 1979). However, threats to family stability are not as upsetting in families that lack cohesion since the family is not the central source of security (Moos & Schaefer, 1986).

What constitutes a source of security for these families? It seems as if it is something connected to a prior location the family will still be disrupted. If it is something that can move with them, one would imagine the degree of disruption to be less.

While moving as a general event is moderately stressful for adults, it seems to be much more so for children and its impact is typically underestimated by their parents (Steinglass & Edwards, 1993).

Though the stresses experienced in a move are many and varied (Raviv, Keinan, Abazon & Raviv, 1990). Luo and Cooper (1990) report that the top factors associated with relocation stress are: *loss of social contacts* and *family related*

problems. A family leaves behind a functioning social support system and arrives in a kind of social vacuum, meaning that the family is entirely dependent on its own resources in a situation which may require resources that are beyond the ordinary, due to the extraordinariness of the foreign context. Steinglass and Edwards (1993) found that family factors were powerful determinants of the adjustment of both parents and children. It follows that the ability to resolve problems that occur would contribute to better adjustment and conversely problems that are beyond the family's resources may fester and produce long term negative consequences. The question is what support do parents have in recognizing and dealing with adjustment related family problems?

Lieberman (1978) believes that personality processes take precedence over social factors as a primary explanatory framework for adaptation. The impact of a move is mediated by factors such as personality, psychological and situational variables, coping strategies and social support (Luo & Cooper,1990; Starker, 1990), the context of a person's life history and his future goals (Stokols et al., 1983). Steinglass and Edwards (1993) found that coping styles and social network characteristics play important roles in determining the adequacy of adjustment, *but for adults only*.

It seems clear that both psychological and social factors are important when considering the individual and family reaction to the stress of relocating. Furthermore the role of the physical environment and its impact on a person's well-being has just recently started getting attention, especially with the development of the fields of Environmental and Community Psychology, Health Psychology, Environmental Engineering and Social Architecture. It seems necessary to take an even wider look to include the supra context.

2.5.2 Environmental factors affecting adjustment

Dunbar (1992) names environmental factors as mediating a person's performance and satisfaction when working abroad. According to Werner,

Altman and Brown (1992), the environment as such does not cause behaviour, however, it is considered as an integral part of behaviour and of effective intra- and interpersonal functioning. They subscribe to a holistic view of people and places being inseparable, mutually defining, and dynamic. Places also have meanings for people and certain environments support specific activities.

Kaplan (1983) proposed a model of person-environment compatibility that considered the patterns of information available in the environment. He considered these patterns in conjunction with environmental constraints on a person's behaviour and the individual's purposes, as potential sources of incompatibility. This problem can incur high psychological costs especially in the absence of restorative or supportive environments. By definition, a hardship post can represent an incompatible environment rather than a supportive environment.

What is known about the impact of the destination community?

2.5.2.1 The destination community

The characteristics of the destination community seem to be important in the reaction to a transfer. To date these characteristics have not been specified or explored in relocation research according to Noe and Barber (1992) and Fisher and Shaw (1994). Yet, Stokols and Shumaker(1983) found person-environment congruence a predictor of personal well-being. Fisher and Shaw (1994) speak of this congruence in terms of individual preference and aspects of the new location.

Carlisle-Frank (1992) identified population density, economic climate, housing satisfaction, person-environment fit, place identity, and negative versus positive perceptions of the environment, as environmental characteristics that affect adaptation.

In a study of US expatriate personnel, Dunbar (1992) found that persons based in Europe were more satisfied with both their social and work conditions than those in non western and/or third world countries. This finding implies that living in a culture that is similar in some ways to one's own, could facilitate adjustment.

2.5.2.2 Family and its spatial context.

The interface between the environment (work place, home, neighbourhood, community, city, church, recreational activities, etc) and the family should be explored when assessing the effect of the relocation process (Lundy, 1994). These places or aspects of the environment, constitute the *spatial context* of the family. The goodness of fit between family members and their spatial context needs to be considered when determining person-environment congruence. This congruence refers to the individual's perception of the degree in which his spatial context supports his important goals and activities. Optimal congruence is seen as a predictor of personal well-being (Stokols & Shumaker, 1983).

Apart from these spatial considerations, there is a temporal aspect to be taken into account.

2.5.2.3 The temporal context

The temporal context - aspects of the past and the future in the form of memories and anticipations - of the environmental experience constitutes a further predictor of well-being.

> "Temporal qualities are inherent aspects of phenomena" (Werner et al., 1992, p. 299).

Here the emphasis is a person's comparative appraisal of her current, previous, and anticipated environments (Stokols & Shumaker, 1983). A comparison that denigrates the current environment would clearly result in anguish.

2.5.2.4 Prior information

The more information available about the country of destination prior to the move, together with exploratory trips, the easier the adjustment process seems to be (Jones 1973). The relationship is not quite so simple: although reducing uncertainty contributes to adjustment, knowing what to expect does not necessarily breed liking (Fisher & Shaw, 1994). Even a short visit in advance does not seem to be comparable with the experience of living in another country.

What one reads or hears about a place in advance is also never quite the same as experiencing it. For example, seeing images of crippled or starving children on television is one thing, but encountering any form kind of human misery when walking on the streets of a host city, can be quite different.

The next aspect refers to the distance away from one's place of origin as a factor that can cause stress.

2.5.2.5 Distance

Greater distance increases the likelihood of stress (Raviv et al. 1990). This can be due to the stress of not being able to get home quickly enough in case of an emergency, and of increased difficulty with maintaining contact with family members at home.

Not all places though, are equal in terms of the effect it has on the individual.

2.5.2.6 Degree of difference

All places are not equally hard to adjust to. The more different the environment, the higher the requirement for new role learning and the higher the risk of rejection resulting in a lower chance of assimilation. Given that personality is a dynamic construct, this process brings in its wake personality modification with

concomitant changes in values, attitudes, and behaviour (Jones, 1973).

Mann (1972) mentions the *amount of change* required as an important moderating variable in relocation. A substantially different environment is associated with higher stress and anxiety levels (Noe & Barber, 1992). Such differences will militate against a strong person-environment fit (Carlisle-Frank, 1992); the adjustment period will be longer and the need for adjustment skills increased (Dunbar, 1992). High quality in-depth training becomes essential for a radically different environment (Kilgore & Shorrock, 1991).

Apart from physical differences, there are cultural differences to take into account. Mendendall and Oddou (1985) speak of the *cultural toughness* of an international posting. Living in a culture that differs considerably from one's own, can result in barriers to communication, misunderstandings and feelings of alienation. Cultures differ in their openness to foreigners and so-called closed cultures can contribute to this sense of alienation.

An unfriendly neighbourhood also plays a role in the sense of well-being of a new family in a new environment.

2.5.2.7 Neighbours and weather

Unfriendly neighbours do not help the adjustment process, but even the weather plays a role here. In this respect, the summer months are better for arrival in a new country as the neighbours are more likely to be outside - provided they are friendly of course (Jones, 1973).

The foregoing paragraphs have one thing in common and that is that relocation implies a process of change and potential loss that requires personal adjustment.

2.5.3 Change : Loss versus opportunity for growth

The changes associated with moving are enduring and affect virtually every aspect of a person's life (Carlisle-Frank, 1992). By facing the demands of a new situation, people adjust and are changed (Jones 1973). Friends and family in the country of origin can react negatively to such changes.

Moving can mean loss and change for everyone; new demands on the family itself can change the way its members relate to one another (Hausman & Reed, 1991). Specific losses include contact with friends, peers and family, emotional support and familiar places.

> "Loss is defined as a state of being deprived of or being without something one has had." (Peretz, in Hatfield, p 70, 1987).

When a move coincides with the loss or addition of a family member, the resultant instability of family relational patterns become traumatic for all (Cornille, 1993).

Change need not necessarily be in a negative direction. Some researchers have focused on the more positive aspects of relocation: Lundy (1994) emphasizes an awareness of cultural diversity and a sense of capacity for change that come with relocation. Martin (1995) sees relocation as an opportunity for personal growth and satisfaction as well as career enhancement.

Humke and Schaefer (1995) describe mobile men and women as having more interesting lives; as seeing themselves as more capable; as being satisfied with their lives; but not with their social relationships. Brett (1982) argues that a more interesting lifestyle and other gains compensate for unsatisfactory social relationships. She does mention that her study may have been biased as she drew people who had a positive attitude towards moving.

Jones (1973) lists the following gains associated with frequent domestic relocation:

an improved ability to cope with stress,
increased flexibility and adaptability,
broader interests,
superior socialization skills, and
an increased understanding and acceptance of other cultures.

Mann (1972) found that the diversity of experience that comes with relocation results in the development of cognitive complexity, flexibility, and autonomy.

It seems that the above findings refer to adults and do not necessarily reflect the experiences of children who grow up in foreign environments.

2.5.4 Family vulnerability and resources

It is possible that geographical stress can push the resources of a family to a crisis stage (Hausman & Reed, 1991; Lundy 1994). We can speak of a crisis when the family's resources cannot cope with the demands of the environment (Hatfield, 1987).

Researchers consider families as being both vulnerable and as having regenerative power: A family reacts to stress but also manages the resources within the unit (McCubbin, 1979). It also remains a source of stability and sameness during times of change (Cornille, 1993; Munton & Forster, 1990). It is interesting to note that during or after a move, family communication focuses on the logistics of the move at the expense of emotional aspects (Benjamin & Eigles, 1991). It would seem that practical imperatives take precedence at such times.

It remains the primary role of the parents to help children adjust to a new community as children acquire coping skills only as they grow older. Children need to feel secure in their families in order to be able to face unfamiliar groups and situations (Cornille, 1993).

2.5.5 Parental roles

There seems to be a high association between a positive post-move attitude on behalf of children and their mother's well-being three months after a move. However, reciprocal causation could be at work here: a negative parental attitude would have a deleterious effect on a child's adjustment and a child's difficult adjustment would have a negative effect on parental attitude (Fisher & Shaw, 1994).

One should bear in mind that children mirror their parents' attitude, whether it is positive or negative (Cornille, 1991). A mother specifically plays a pivotal role in moving (Jones 1973), and if she has a negative attitude about the move her children will display a negative attitude towards their new neighbourhood and school (Humke & Schaefer, 1995).

In traditional families the mother can and does still fulfill a nurturing and stabilising role. But in 1994, Lundy views the marriage as an equal partnership and has serious reservations about the wisdom of such a role for the mother. Taking responsibility for the family's well-being is laying herself open for blame when things go wrong and denying her partner the opportunity of taking care of his share of the family adjustment process. This view implies that parents share financial and nurturing responsibilities equally.

But what may be true for one family is not necessarily true for another as families may be at different developmental stages, each person with his or her specific needs.

2.5.6 Family life cycle

The specific developmental stage of a family member will also impact on moving decisions and experiences. For instance, Jones (1973) noted that a younger

woman feels more lonely directly after a move than an older woman whose children had left home.

Noe and Barber (1992) found that the higher an employee's age, the less willing he is to relocate. If one considers the amount of physical and emotional energy that is expended each time one moves, it is easy to appreciate this finding. There seems to be an inverse relationship between a person's age and the amount of stress he can tolerate (Raviv et al., 1990).

2.5.7 Adolescents

It seems that parents resist moving as their children grow older (Brown & Orthner, 1990), while parents with younger children are more willing to move (Munton & Forster, 1990). Certainly as children grow older conflicting family needs create problems where there are no easy answers.

Loss of one kind or another after a move is almost invariably incurred. The adolescent who remains behind at boarding school forfeits family support during vulnerable years for the sake of uninterrupted schooling and a stronger sense of roots. The adolescent who opts to disrupt his South African schooling and leaves friends behind to move with his parents loses social status, may eventually identify with a foreign country, or remains at the edge of society (Shaw, 1992).

Parents and adolescents could have a difficult time when deciding whether to attend boarding school in South Africa or whether to go to an international school. They are trying to compare a known situation with an unknown one. In the absence of clear guide lines, many *ad hoc* decisions are taken. This can result in much heart ache, and even disruptive reversals of decisions that created new problems. Attending boarding school when parents are overseas is simply not the same as when parents live on a farm that is two hours' drive and a

reasonably priced telephone call away (Shaw, 1992).

Of course there seems to be positive lessons learnt both ways, but sadly the hidden costs may sometimes become apparent only after many years.

2.6 An adjustment process for the family

Early work looked at relocation as an undifferentiated event to which people had a variety of adjustment reactions (Steinglass & Edwards, 1993). More recently the process has been divided into phases (Sluzki, 1979). The experience in each phase affects coping with following phases and contributes to the eventual adjustment after a move.

Sluzki identified five phases in adjustment after migration, namely:

- preparation;
- act of migration;
- period of overcompensation;
- period of decompensation; and
- transgenerational impact).

The decision to move is seen as part of the preparation phase. Stokols and Shumaker, 1982) include a consideration of the relocation history and individual attitudes as contributing to adjustment. Steinglass and Edwards (1993) have identified the following seven phases in international relocation:

- a relocation history and individual attitudes towards moving;
- a decision to move;
- preparation for the move;
- the move itself;
- its aftermath;
- short-term adjustment; and
- long term adjustment .

Carlisle-Frank (1992) urges researchers to incorporate personal, social, and environmental factors into models that describe adaptation to relocation. Adaptation is viewed as an ongoing process of interaction between individuals and the systems of the family, work environment, social network, community and the society.

Munton and West (1995) see adjustment as a two-dimensional process. The one dimension concerns the personal changes and role changes of the person, and the other has to do with individual differences as well as the specific characteristics of the environment. This comprehensive model seems to encapsulate the complexity of adjustment along several axes.

Authors seem to be in agreement that relocation represents an adjustment process for the employee and his family. Humke and Shaefer (1995) pinpointed five aspects to family adjustment, namely: *social, behavioural, school adjustment, physical health and self-confidence.* This adjustment results from a change in *housing*, *education*, *leisure activities*, *daily routine*, *lifestyle* and a *disrupted social life* (Noe & Barber, 1992).

What does this mean for newly relocated diplomatic families? The following section considers the possible effect of these changes and is based on the information at my disposal at the time of writing.

Housing: A house is provided by the employer but usually has to be found by the employee and comply with departmental regulations. The family often stays in a hotel until such time as a suitable house has been found and their personal effects have arrived. The longer this period before moving into a house, the more unsettling for a family especially if they have small children.

Education: Children generally attend American International Schools and are

required to function more independently than in the school of their own culture as at home.

Daily routine and lifestyle: A daily routine changes as a result of changes in school hours, shopping hours, office hours and traffic conditions. Apart from these adjustments, each country has its own pace and style of life, its own customs, and availability of domestic help. It is necessary to find a new lifestyle that maintains some elements of the old within the constraints or possibilities of the foreign country.

Leisure activities: Families in South Africa are used to having a wide array of affordable leisure activities. There is a conspicuous lack of such facilities in hardship postings and where such facilities exist, the costs are often exorbitant. These families find their lives constricted by external limitations to their preferred activities.

Disrupted social life: The relationship between a social support system and stress has been well established. I am including results of relevant research on the specific requirements of a social support system for newly relocated people. (Weiss, 1974) conducted research in the field of social psychiatry that situates the individual in his world of interacting. This represents a shift in the focus of the search for the aetiology of neurotic behaviour away from the individual himself. Weiss provides a set of six provisions for social relationships that are supplied by significant others in an individual's daily life. This work is based on research with newly relocated groups and single parents who had deficient social support structures. It seems relevant here as international relocation represents a break in important social relationships. An awareness of the specific role of these provisions in a person's well-being or otherwise can enhance our understanding of the nature of adjustment in a social "vacuum".

The six provisions are identified as:

- attachment;
- social integration;
- opportunity for nurturing others;
- reassurance of worth;
- a sense of reliable alliance; and
- the possibility of obtaining help and guidance.

It is important to note that this is not an exhaustive list (Weiss, 1974).

Attachment is provided by relationships that make it possible for a person to have a sense of security and place, resulting in emotional comfort and a sense of being at home. A lack thereof can result in feelings of loneliness and restlessness. Prolonged separation from attachment figures can result in acute distress.

Social integration implies the availability of a community where relationships can be formed that are based on shared concerns. These provide a source of information, companionship and social activity. Eventually a shared interpretation of experience can develop.

Opportunity for nurturing others refers to the satisfaction adults derive from caring for a child or another person. The act of nurturing provides many people with a sense of meaning and motivation to keep going.

Reassurance of worth promotes self-esteem and is obtained from family or colleagues. Relationships that confirm a person's competence in a particular role are essential for self-esteem.

A sense of reliable alliance comes from being connected to one's family, who would generally support a family member without question. A decrease in such contact, which is common today, means that this provision is not being met.

The obtaining of guidance becomes very important in times of adversity. Most people appreciate having access to a trustworthy and authoritative person who can provide emotional support and facilitate plans of action. A new arrival in a foreign country may not have access to such a person during her entire stay. (Weiss, 1974).

2.6.1 Phases of adjustment

Adjustment is also a process with recognizable stages. The relocation literature speaks of three phases (1-3) of the adjustment process (Dunbar, 1992). Lundy (1994), described four critical periods (A-D) during which each individual will have different experiences. Each stage encompasses a different set of expectations for each family member. I have combined these two models as follows:

1. The pre-transfer and preparation stage.
Events that take place and expectations before leaving play a role in the next stages.

2. The honeymoon phase or *the arrival and early post-move stage.*
This phase refers to an initial euphoria that can last several weeks or even months. Everything is new, exciting and full of possibilities.

3 The culture shock phase or *the post-move crisis period*
This is a period of disequilibrium and an unpleasant phase that accompanies the realization that things are done very differently in a foreign country. A common reaction is to want to oppose or change the prevailing system. A small and typical example is when a person becomes "righteously" indignant when speaking to fellow country-men about the inability of local people to understand how traffic should flow.

This phase progresses in a cyclical fashion. As soon as someone thinks he is beginning to understand the way things work and people think, something often happens to disillusion the person completely. Lazarus (1977) speaks of "a coping episode" which resembles a state of continual flux that changes in quality and intensity as a function of new information and outcomes of previous responses.

This is the stage when the family seems most vulnerable.

4. *The return to a neutral level of affect* or *the post-move adjustment period.* At this stage, some months or even years after arrival, a person accepts that cultures and customs differ and gives up trying to change his environment or to "save" the foreign culture from themselves. He has developed a tolerance for irritating aspects of the different culture.

2.6.2 The impact of relocation

Researchers report that the effects of this event range from profound for some families (Munton & West, 1995) to unproblematic for other families, particularly military families (Munton & Forster, 1990). Brett (1992), in her work on domestic relocation, found few differences in well-being between people who do not move and those who are mobile. Other researchers found the relationship to be more complex (Stokols et Shumaker,1983).

Differences among family members mean that not everyone will be affected in the same way (Lundy, 1994). The following section reviews the specific impact on both employee and spouse in terms of their various roles, before considering the impact of relocation on marriage and children.

2.6.3 Impact on the employee

According to Steinglass and Edwards (1993), the meaning given to a relocation is an important factor to consider when assessing its impact on individuals.

Luo and Cooper (1990) mention that changes in the work situation after relocation only account for low stress levels. Martin (1996) found that employees report *no* change in their stress levels after a move.

Munton and Forster (1990) speak of a *"time-to-proficiency"* effect as the work performance of an employee is affected temporarily after a move.

Dunbar (1992) found a higher degree of intrinsic work satisfaction among ex-patriate managerial and technical personnel than among domestically relocated personnel. This satisfaction is linked to the opportunity of having more autonomy and responsibility. Furthermore there is a higher correlation between intrinsic motives for relocation and satisfaction than for reinforcers such as salary and perquisites.

But while an employee may enjoy greater autonomy and work-satisfaction (Dunbar, 1992; Harvey, 1982), he may just as easily become pre-occupied with the demands of the job and be unavailable to his family (Cornille, 1993; Shahnasarian, 1991).

The role of home support for adequate work performance is stressed, though little is known about the processes by which family reactions to relocation affect the employee's adaptation to his new position (Munton & Forster, 1990).

Stress at the work-family interface presents an obstacle to fulfilling one's role adequately in either system (Bowen, 1988). If the family's adjustment results in dysfunction, then work performance becomes impaired (Munton & Forster, 1990). It seems that the employee is only affected temporarily by a move but a family who is not adjusting well could cause the employee distress. These findings

highlight the need to consider the family's functioning holistically in the case of international relocation instead of focusing on the employee only.

If the employee is able to develop a *sense of coherence*, even at his home base, it seems that his motivation also after relocation and regardless of the adjustment to a new environment, will be high and positive. Antonovsky's (1987) use of this concept implies trust and understanding of a person's world, a world that is manageable and full of meaning, that regardless of daily adversities, struggles and stumbling blocks, he feels in charge of his life with the expectation of relative need satisfaction.

2.6.4 Impact on accompanying partner

The employee's spouse was previously referred to as a trailing spouse. Now, the term "trailing spouse" though accurate, is seen as demeaning (Bayes, 1986) and has been replaced by "accompanying partner" (Kilgore & Shorrock, 1991).

Women seem to be more stressed by moving than their partners (Bayes,1986; Lundy,1994; Shahnasarian,1991; Stokols, Shumaker & Martinez, 1983). Women report experiencing:

the loss of a home,
a career,
a social network, and
a sense of self (McCollum in Lundy, 1994);
loss of personal identity, and
erosion of self-confidence (Shahnasarian,1991), and
boredom and loneliness (Martin, 1996).

But it is the career spouse who gives up a job to accompany a partner who finds relocation the most distressing. The career spouse loses career momentum, his or her network of professional contacts and experiences a shift in job status

(Shahnasarian, 1991).

The spouse's failure to adjust in an overseas posting, is the main reason for failed assignments (Tung, 1987. In Kilgore & Shorrock, 1991). Spouses experience the reduction in lifestyle, disorientation and dissatisfaction that occur at repatriation as having a major impact of longstanding duration. Conversely increased family stress has a minor impact but also of longstanding duration (Harvey, 1982).

It seems clear from recent research that there are both gender and role differences in terms of relocation (Donohue & Gullotta, 1983). It seems that the reasons for the discrepancy between the genders have not been addressed yet (Lundy, 1994). One reason may be that the spouse becomes very dependent on his/her partner and has limited options for gainful employment or even just to keep busy in a foreign country (Shahnasarian, 1991).

The fact that women generally have more active contact with family networks than men before moving, could be a partial explanation for this phenomenon (Lieberman, 1979). Frye (1991) also proposes that accepting a relocation, can lead to feelings of giving up power to the spouse and his company. In these ways women, as accompanying spouses lose more than men when they relocate. Clinical studies have shown that wives who were transferred, tend to suffer from depression (Seidenberg, 1973).

Male accompanying partners report the highest stress levels of all after a move (Martin, 1996) and often report a drop in self-esteem (Frye, 1991).

2.6.5 Impact on marriage

Munton and Forster (1990) say that relocation has a significant impact on the course of a marriage. The authors quote Burgoyne (1987) who found an intimate

link between relocation and decisions to either end a marriage; begin a new relationship; or start a family.

A high degree of *spouse support* is significantly associated with successful adaptation in dual-career couples after relocation (Neims, in Starker, 1990). Starker (1990) reports an increased reliance on the employed spouse after a move, but cautions that over-reliance could cause marital tension. The employed spouse virtually takes the place of the lost social support system. Increased mutual dependence should be the norm until a satisfactory circle of friends can be established.

A relationship can become strained by feelings of anger and resentment by a spouse who feels that he/she had to make a significant sacrifice to remain with the partner. These feelings may not manifest until long after the move (Shahnasarian, 1991).

Domestic relocation does not seem to have such a negative impact on a relationship as Brett (1982) states that mobile couples are more satisfied with their marriages and their lives than couples who do not move.

2.6.6 Impact on children

Parents report social adjustment problems for their children after a move (Brett, 1990). It is relevant therefore to include a discussion on the impact of relocation on children.

Children are involved in a high proportion of moves but not necessarily included in the decisions about the move. Moving is often something that just happens to a child and combined with the changes in his routine and setting, constitutes some of the stress experienced. (Brown & Orthner, 1990).

I have divided the review into two parts, namely younger children and adolescents. This distinction reflects the major spheres of influence during the growing up. During childhood the family provides the strongest point of reference whilst peer groups replace the parents during adolescence.

Young children may experience a move as a disintegration of their immediate world. Nevertheless parents report fewer problems moving young children than older ones (Brown & Orthner, 1990).

Gordon and Gordon (1958, in Raviv et al., 1990) linked high mobility with emotional problems in children. Vulnerability after moving is expressed as adjustment difficulties and regressive behaviour (Sandler & Bloch, 1979 in Raviv et al., 1990).

Long distance moves are linked to a lower self-concept (Kruger, 1980 in Cornille, 1993). Cornille found that children who have adjustment problems are generally those who have problems forming social relationships due to being overly shy, unfriendly or withdrawn. But she adds that the negative impact is short-termed.

Adolescents who relocate seem to experience more problems than younger children, since their peer relationships cannot be of the same quality as that of their more stable contemporaries (Luo & Cooper, 1990). Developmentally they are involved in developing a self-identity and investing in a social life. A move constitutes a disruption of these processes (Raviv et al., 1990). Humke and Schaefer (1995) explain that adolescents risk being rejected by peers at a stage of development when peer acceptance is very important to them.

Cornille (1993) found a moderate relationship between relocation and psychological reactions in adolescents. These reactions can include self-injury, hysteria, depression and thought disorganization.

On the other hand, Brett (1982), the domestic relocation researcher, found that children who do well and make friends easily carry such experiences from school to school.

2.6.6.1 Social disruption and children's adjustment.

In contrast to adult relocation stress which is mainly ascribed to individual personality characteristics and role changes, the major cause of the stress experienced by both children and adolescents are ascribed to changes in the social system. They have to make new friends and overcome the loss of old ones. Children and adolescents need to develop a sense of belonging and need to integrate into recreational, church and youth groups. Basically 55% of their needs are peer interaction related and most of these opportunities arise at school. If the response to their needs is inadequate, the child's experience is worse (Humke & Schaefer, 1995), but successful peer interaction will influence adjustment positively in other areas (Cornille, 1993).

Children who differ from the main group either culturally, ethnically or because of a handicap, will experience the most difficulties in adjusting to a new school (Cornille, 1993).

Luo and Cooper (1990) found no negative effects on the mental health of children who move, on their relationships with their parents and on school achievement. Humke and Schaefer (1995) came to a somewhat different conclusion: they found that repeated school transfers may increase the risk of school failure and that a high number of life stresses for a child or adolescent will have a negative effect on his adjustment.

Steinglass and Edwards (1993) in their review of the literature on children's adjustment after international relocation, conclude that relocations help children learn positive adaptation skills and propose that it is normal to experience

feelings of depression following a move when one is coping with the loss of friends, place in school, neighbourhood and home. They found no evidence of long term emotional disturbances for children

2.7 Psychological, interpersonal, social and other factors

According to the literature reviewed, the factors that influence a person's adjustment after relocation can be broadly categorised as psychological, interpersonal and social in nature. Apart from the wide range of contributing factors there is a considerable degree of individual variation in reaction to the demands of relocation. Although these are discussed separately, there is an interaction between these factors.

2.7.1 Psychological factors

2.7.1.1 Personality characteristics and successful relocation

As mentioned before, psychological indices show a higher association with adaptation than social indices (Lieberman, 1978).

We see that *the ideal transferee* has:

* a high self-esteem (Hausman & Reed, 1991;Munton & West, 1995), and a strong self-concept (Carlisle-Frank, 1992),
* an internal locus of control (Luo & Cooper, 1990; Carlisle-Frank, 1992),
* the ability to cope with change (Shahnasarian, 1991),
* and similarly, stress tolerance in situations of uncertainty, novelty and complexity (Carlisle-Frank, 1992),
* flexibility (Dunbar, 1992),
* enjoys subjective well-being as a stable trait (Munton & West, 1995),
* has orientation towards conceptual intellectual processes (Carlisle-