

**WE ARE NOT ON VACATION!
BRIDGING THE SCHOLAR-PRACTITIONER GAP
IN EXPATRIATE FAMILY RESEARCH**

**Symposium Presented
at
US Academy of Management Meeting
Orlando, Florida
9-13 August 2013**

Symposium Organizers

Mila Lazarova
Simon Fraser U.
Beedie School of Business
8888 University Drive
Burnaby, B.C. V5A 1S6
CANADA
Tel: 778-782-6784
E-mail: mbl@sfu.ca

Yvonne McNulty
Shanghai University
Sydney Institute of Language
& Commerce
20 Chengzhong Road
Jiading District
Shanghai 201800
PR CHINA
Tel: +65-9107-6645
E-mail:
ymcnulty@expatresearch.com

B. Sebastian Reiche
IESE Business School
Department of Managing
People in Organizations
Ave. Pearson, 21
Barcelona 08034
SPAIN
Tel: +34-93-253-4200
E-mail: sreiche@iese.edu

Symposium Sponsors

1. International Management
2. Human Resources
3. Organizational Behavior

Symposium Title

WE ARE NOT ON VACATION! BRIDGING THE SCHOLAR-PRACTITIONER GAP IN EXPATRIATE FAMILY RESEARCH

Symposium Organizers

Mila Lazarova
Simon Fraser U.
Beedie School of Business
8888 University Drive
Burnaby, B.C. V5A 1S6
CANADA
Tel: 778-782-6784
E-mail: mbl@sfu.ca

Yvonne McNulty
Shanghai University
Sydney Institute of Language
& Commerce
20 Chengzhong Road
Jiading District
Shanghai 201800
PR CHINA
Tel: +65-9107-6645
E-mail:
ymcnulty@expatresearch.com

B. Sebastian Reiche
IESE Business School
Department of Managing
People in Organizations
Ave. Pearson, 21
Barcelona 08034
SPAIN
Tel: +34-93-253-4200
E-mail: sreiche@iese.edu

Symposium Sponsors

2. International Management 2. Human Resources 3. Organizational Behavior

Statement from the Symposium Chairs

We, Mila Lazarova, Yvonne McNulty and Sebastian Reiche, declare that we have received signed statements or emails from all intended participants formally agreeing to participate in the entire symposium, and stating that they are not in violation of the Rule of Three + Three.

Symposium Papers (in order of presentation)

The Impact of Work- and Family-Role Adjustment on Expatriates' Engagement and Performance

Mina Westman (Presenter)
Tel Aviv University
Faculty of Management
Tel Aviv 69978
ISRAEL
Tel: +972-3-6408189
Fax: +972-3-6407739
E-mail: MinaW@tauex.tau.ac.il

Mihaela Dimitrova (Author)
University of Wisconsin-Milwaukee
Sheldon B. Lubar School of Business
P.O. Box 742
Milwaukee, WI 53201-0742
USA
Tel: 414-737-9013
E-mail: mihaela@uwm.edu

Shoshi Chen (Author)
Tel Aviv University
Faculty of Management
Tel Aviv 69978
ISRAEL
Tel: +972-3-6408515
Fax: +972-3-6407739
E-mail: shos@post.tau.ac.il

Margaret Shaffer (Author)
University of Wisconsin-Milwaukee
Sheldon B. Lubar School of Business
P. O. Box 742
Milwaukee, WI, 53201
USA
Tel: 414-229-4544
E-mail: shafferm@uwm.edu

Sources of Support and Expatriation: A Multiple Stakeholder Perspective of Expatriate Adjustment and Performance in Malaysia

Marlin Abdul Malek (Author)

Universiti Utara Malaysia
International Business Department
School of International Studies
UUM COLGIS
Sintok Kedah 06010
MALAYSIA
Tel: +604-9286605
E-mail: marissa@uum.edu.my

B. Sebastian Reiche (Presenter)

IESE Business School
Department of Managing People in Organizations
Ave. Pearson, 21
Barcelona 08034
SPAIN
Tel: +34-93-253-4200
E-mail: sreiche@iese.edu

The Link Between Expatriate Family Issues and a Shrinking – and Changing - Talent Pool: What We Know and Where We Need More Research

Scott Sullivan (Presenter)

Executive Vice President
Brookfield GRS
900 South Frontage Road, #200
Woodridge, IL 60517
USA
Tel: 630-427-2062
E-mail:
scott.sullivan@brookfieldgrs.com

Gill Aldred (Author)

Senior Director, Consulting
Brookfield GRS
One Finsbury Market
London EC2A 2BN
UK
Tel: +44-(0)20-7920-3814
E-mail:
gill.aldred@brookfieldgrs.com

Jill Taylor (Author)

Vice President, Consulting
Services
Brookfield GRS
900 South Frontage Road, #200
Woodridge, IL 60517
USA
Tel: 630-972-2280
E-mail:
jill.taylor@brookfieldgrs.com

Family Talent Management: Designing an Expatriate Dual-Career Competency Framework

Miriam Moeller (Presenter)

Faculty of Business, Economics
and Law
UQ Business School
The University of Queensland
Brisbane QLD 4072
AUSTRALIA
Tel: 617-3346-8175
E-mail: m.moeller@uq.edu.au

Yvonne McNulty (Author)

Shanghai University
Sydney Institute of Language &
Commerce
20 Chengzhong Road
Jiading District
Shanghai, 201800
PR CHINA
Tel: +65-9107-6645
E-mail:
ymcnulty@expatresearch.com

Michael Harvey (Author)

Chair of Global Business
Department of Management
School of Business
University of Mississippi
Holman 332
University, MS 38677
USA
Tel: 662-915-5820
E-mail:
mharvey@bus.olemiss.edu

Moving Sucks! What Expatriate Families Really Want (and Get) When They Relocate

Mila Lazarova (Presenter)

Simon Fraser U.
Beedie School of Business
8888 University Drive
Burnaby, B.C. V5A 1S6
CANADA
Tel: 778-782-6784
E-mail: mbl@sfu.ca

Robin Pascoe (Author)

Expatriate Press Limited
1430 Terrace Avenue
North Vancouver, BC, V7R 1B4
CANADA
Tel: 604-990-4532
E-mail: robinpascoe@shaw.ca

Symposium Overview

While in recent years long-term expatriation has been supplemented, and in some cases replaced, by alternative expatriation in the form of short-term, commuter, frequent traveler or virtual team assignments (Meyskens, von Glinow, Werther, & Clarke, 2009), ‘traditional’ long-term assignments are still the norm in many organizations, and the most common expatriate profile is still an expatriate who is married or attached, often accompanied by children (Brookfield Global Relocation Services, 2012). International assignments are a strong catalyst for changes in both the family and work lives of expatriates, and prior research has determined that spouse and family adjustment is an important contributor to overall international assignment success (Andreason, 2008; Cole, 2011). Recent industry surveys (e.g., Cartus & Primacy, 2010) show that ‘family and personal circumstances’ and ‘partner’s career’ remain the top reasons for refusing to accept an international assignment, thus representing a critical relocation challenge. Further, Andreason (2008) found that the three main reasons for failed assignments constitute a continued risk: family concerns, partner dissatisfaction, and inability of spouse to adapt.

More than two decades of research shows that the trailing spouse, in particular, plays a key role during expatriation in terms of willingness to go, assignment completion, expatriate and family adjustment, and expatriate performance (Black & Gregersen, 1991; Lazarova, Westman, & Shaffer, 2010). Prior research (e.g. Caligiuri, Hyland, & Joshi, 1998; Takeuchi, Yun, & Tesluk, 2002) shows that there are significant family system effects during international assignments, where crossover effects between the trailing spouse, expatriate employee and other family members such as children, can influence attitudes and behaviors. McNulty (2012) found that professional support (to address the dual-career issue) and social support (to alleviate marital stress) were perceived by trailing spouses as having the greatest impact on identity reconstruction and, in turn, their adjustment, despite that both types of support were lacking.

While the body of research that confirms the importance of family as a factor in expatriate success is growing steadily, organizations with expatriate employees do not appear to have utilized much of the knowledge generated by researchers. They still face just as many, if not more, expatriate family-related challenges as they did several decades ago. Some of the issues have changed: notably, expatriate partners are much more likely to have careers of their own much more than they did 40 years ago and professional concerns are far more salient than they were in the past, but the core of the problem has not changed: organizations and families generally underestimate, by a wide margin, the challenges of international assignments.

In this symposium, we bring together five papers focused on a range of expatriate family issues including the dual-career challenge, relocation transitions, organizational support, adjustment, and key emerging trends. Four of the papers are authored by international teams of global mobility scholars from countries that include (in addition to the USA) Malaysia, China, Australia, Canada, Spain, and Israel. We also include a paper by industry experts - a team from *Brookfield Global Relocation Services* based in the USA and UK, an organization that has conducted research on corporate relocation and international assignment policies and practices for 18 years - that allows both researchers and managers to map out the dynamic context of expatriation and the continuous changes of global mobility trends. We believe that the main contribution of our symposium is the marrying of theory and practice from an ‘*international membership [that] affords us a broad perspective ... across regions, [on] issues of practical importance to managers, employees, and the other stakeholders in our scholarly enterprise*’ (Adler, 2012). In response to the often repeated call for ‘bridging the gap’ between academia and management (Hughes, Bence, Grisoni, O’Regan, & Wornham, 2011), our goal in this symposium is to integrate the primarily theory-driven focus of scientific inquiry regarding antecedents, processes and outcomes of expatriate/family relocations with a more phenomenon-driven

approach of industry consultants to understanding what matters for expatriate families. As such, the papers we have chosen fit well with the conference theme of ‘*capitalism in question*’, in the context of addressing the emerging needs of an ever-changing dynamic and diverse global workforce facing unprecedented economic and financial challenges.

The first two papers are empirical but use different theoretical lenses to examine the antecedents and outcomes of expatriate adjustment. *Westman et al.* provide a partial empirical test of the theoretical model proposed by Lazarova, Westman and Shaffer (2010) to investigate how expatriate adjustment relates to performance among 200 managers currently on assignment. Drawing on the Job Demands-Resources Model and spillover theory, the authors conceptualize adjustment as the achievement of role expectations in two life domains – work and family – and map the relationships among expatriate work-role and family-role adjustment. In our second paper, *Malek and Reiche* draw on anxiety/uncertainty management theory to show among a sample of 134 expatriate-partner dyads in the culturally tough context of Malaysia that support from the organization, host country nationals and family members (and the spouse in particular) will help expatriates to reduce their feelings of anxiety and uncertainty inherent in their relocation and facilitate cross-cultural adjustment and ultimately their performance.

The third paper by *Sullivan et al.* provides a detailed overview of family issues in global mobility from an industry perspective. *Brookfield Global Relocation Services*, one of the industry’s most reliable sources of global relocation trends, draw on 18 years of data that highlight a number of expatriate family issues that continue to cause challenges for global mobility managers and their companies, along with insight as to where future research on this important topic needs to be directed. The fourth paper by *Moeller et al.* builds on and extends historical conceptualizations of dual-career expatriation to suggest that a core set of competencies and capabilities acquired by dual-career couples will lead to a distinct competitive advantage for

organizations. In developing a four-level framework consisting of individual, couple, institutional, and national competencies that define ‘dual-career success’, they identify the processes by which expatriates develop dual-career competencies and capabilities utilizing informal and formal support mechanisms, and provide a theoretically grounded conceptualization of cognitive, functional, and emotional dimensions that impact dual-career capabilities.

In our final paper, *Lazarova and Pascoe* build on prior research to re-visit the issue of organizational support through the eyes of expatriate families. The paper is phenomenon-driven and is based on data from a sample of 656 respondents (primarily expatriate spouses, but also expatriates and teenage children) on assignment in 62 countries with origins in 44 home countries. The findings provide compelling insights and new research directions for the field, as well as a critique of existing assumptions about the effectiveness of organizational support, particularly during critical transitions.

Whereas the papers in this symposium represent a diverse set of issues and include both empirical and conceptual studies, they are all closely related to understanding how expatriates’ different life domains interact in facilitating an international relocation. Taken together, each provides a different angle and theoretical perspective to individuals’ and their families’ transitions across countries that have important implications for both research and practice. Along with the industry perspectives provided by Brookfield, our symposium is likely to provide rich insights that extend our knowledge, and future research agendas, in this field of inquiry.

This symposium is targeted towards three Academy divisions. First, it is most suited to the *International Management* division, as at its core it focuses on essential concerns for multinational organizations that need a cadre of successful globally mobile professionals in order to execute their internationalization strategies. Not only do the various papers focus on a phenomenon and unit-of-analysis that are truly cross-national in nature, the research samples

entail expatriates and their families from a vast range of countries-of-origin and that were also relocated to many different host countries. Our symposium is itself a product of a collaboration between authors spanning across eight countries. As such, it offers a truly international perspective on critical current questions and suggests avenues for future studies. Second, the presentations are designed to discuss important implications for developing effective HR systems and practices that can aid organizations in designing appropriate support practices for their expatriate employees. We explicitly incorporate the view of international industry consultants to complement and enrich the scholarly perspective on the study of expatriate family matters. Our goal here is to make the symposium interesting for the members of the *Human Resources* division. Finally, the symposium reflects the *Organizational Behavior* division's interest in the study of "internal processes and practices as they affect individuals." All five papers examine the psychological and/or social processes that affect transitioning individuals' and their families' attitudes, behaviors and cognitions.

The symposium consists of five presentations, followed by an audience discussion and lively debate. To this end, we are committed to (a) limiting the time of each presentation to allow for more audience participation, and (b) having the organizers act as facilitators as opposed to discussants to allow an interactive discussion among the presenters and the audience. Each presentation will be limited to 12 minutes, allowing for 30 minutes of audience-presenter interaction. The discussion, facilitated by the organizers, will be guided by three key questions:

1. What has changed in expatriate family issues over the past two decades since research on this topic first began? Is it 'more of the same' or has the playing field changed? If so, why?
2. To what extent is scholarly research on this topic of value to practitioners (relevance), and do practitioners use scholarly research in their consulting work with clients (implications)?
3. Where can our scholarly research on this topic be best directed to serve the needs of the

scholarly and practitioner communities we serve? What are the hot topics in expatriate family research demanding our attention over the coming decade?

References

- Adler, P. 2012. *Scholarly Program Call for Submissions*. Accessed on 19 December 2012 at <http://aom.org/annualmeeting/submission/scholarly/>.
- Andreason, A. 2008. Expatriate adjustment of spouses and expatriate managers: An intergrative research review. *International Journal of Management*, 25, 382-395.
- Black, J.S., & Gregersen, H. 1991. The other half of the picture: Antecedents of spouse cross-cultural adjustment. *Journal of International Business Studies*, 22, 461-477.
- Brookfield Global Relocation Services. 2012. Global relocation trends survey report. Woodridge, IL.
- Caligiuri, P., Hyland, M., & Joshi, A. 1998. Families on global assignments: Applying work/family theories abroad, *Current Topics in Management*, Vol. 3: 313-328.
- Cartus, & Primacy. 2010. Global mobility policy and practices survey. Wilmington, NC.
- Cole, N. 2011. Managing global talent: Solving the spousal adjustment problem. *International Journal of Human Resource Management*, 22, 1504-1530.
- Hughes, T., Bence, D., Grisoni, L., O'Regan, N., & Wornham, D. 2011. Scholarship that matters: Academic-practitioner engagement in business and management. *Academy of Management Learning & Education*, 10, 40-57.
- Lazarova, M., Westman, M., & Shaffer, M.A. 2010. Elucidating the positive side of the work-family interface on international assignments: A model of expatriate work and family performance. *Academy of Management Review*, 35, 93-117.
- McNulty, Y. 2012. 'Being dumped in to sink or swim': An empirical study of organizational support for the trailing spouse. *Human Resource Development International*, 15, 417-434.
- Meyskens, M., von Glinow, M., Werther, W., & Clarke, L. 2009. The paradox of international talent: Alternative forms of international assignments. *International Journal of Human Resource Management*, 20, 1439-1450.
- Takeuchi, R., Yun, S., & Tesluk, P. 2002. An examination of crossover and spillover effects of spousal and expatriate cross-cultural adjustment on expatriate outcomes. *Journal of Applied Psychology*, 87, 655-666.