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Cases on Critical Practices for Modern and Future Human Resources Management

Devi Akella, Niveen Eid, and Anton Sabella

IGI Global
PUBLISHER of TIMELY KNOWLEDGE

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Devi Akella
Albany State University, USA

Niveen Eid
Birzeit University, Palestine

Anton Sabella
Birzeit University, Palestine

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Tel: 717-533-8845 x100 • Fax: 717-533-8661
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Section 1
Critical Perspectives on Human Resources Management

Rachelle K. Scott, Albany State University, USA
Devi Akella, Albany State University, USA

This case study follows the career of Robert Peters (pseudonym), a middle level manager who faces numerous challenges as a team manager during his fledgling years. He is constantly questioning his role as the managerial representative who has to take care of his team members, their interests, and professional welfare. Scenarios such as the ethicality of senior management in ordering their lower level managers to spy on the employees during unfolding of trade unions activity, employees' rights during various change processes, disciplinary actions taken on employees which may lack human compassion, and issues pertaining to equity due to bias and nepotism are explored. This is an effort to understand the unequal quotient between labor and management, hidden depths in human resources (HR) role and functions, and ethical dilemmas which HR managers confront during their corporate career. This case study will enable readers to critically reflect on the responsibilities of HR, including its challenging role as the intermediary between the labor and management.

Anju Kamal, Amrita Vishwa Vidyapeetham, India

Digital technologies are changing the nature of work. Through a case, this study demonstrates the adoption of new forms of work in an organization. The HR department of the information technology firm XYZ often finds it a challenge to place resources with the right technical skill set in their projects within the timeframe specified by the clients. The fact that most skilled workers would retire in the next 10 years posed a different issue. The production of error free monthly reports of resource allocations was another challenge. Drawing from ecology theory, this study expands existing theories of strategic decision making in the context of innovation adoption. The study contends that the innovation of platform sourcing by creating a sustained competitive advantage can solve the challenges. The study adopts the lens of work design to understand the effect of technology on individual outcomes and support the implementation of the innovation.

Chapter 3

Jhilmil Das, Indian Institute of Management Kashipur, India

In this era of incessant turbulence and upheavals, organizations are bound to remain resilient and agile in order to sustain in such challenging scenarios. The study narrates the crises faced by a premier Indian shipyard which suffered a major setback due to the massive squall, leading to grounding of one of its major infrastructures. The case depicts the dilemma faced by the shipyard in the wake of the crises and the subsequent disposition of leadership, resilience, and commitment exhibited by its protagonist leader, who remains undeterred in the face of adversity and took it in his stride to answer the call of duty in order to rebuild the shipyard for a better tomorrow. This chapter highlights various tenets of transformational leadership emanating out of the burgeoning crisis based on the contingency theory of leadership. The study aims to uniquely contribute to the field of academics as well as practice through deliberative approach in understanding the nature of crisis and impact of the crisis management on HRM and leadership competencies required to handle crisis situations.

Chapter 4

Tahani Abdallah AbdelJawad, Birzeit University, Palestine

Using a niche service provider, Zforce Government Solutions (ZGS), this case provides the reader with a first-hand examination of the organizational issues resulting from ineffective recruiting, retention, and succession planning, allowing for the acknowledgment of the coherent, interdependent, and interrelated relationship between the aforementioned topics. This case study performs a revelatory assessment of ZGS's application of Harvard's Soft HRM model and fundamentals of key issues reflecting organizational mismanagement of human talent, where human talent is

vital to organizational continuity. Written from the vantage point of a previous ZGS senior management employee, this case study utilizes a qualitative research approach, with empirical data gathered from four in-depth interviews conducted with previous ZGS leadership employees. Ultimately, the case study is intended to induce reader-reflection on the various components of importance in talent management, which play a significant role in accomplishing employee loyalty and employee retention.

Chapter 5

Lauren A. Turner, University of Massachusetts, Lowell, USA
Michael C. Beers, University of Massachusetts, Lowell, USA

Details of a sexual harassment investigation were shared with members of the community by the employee who initially filed the related complaint and were subsequently leaked to the local media. Such details are regarded as confidential personnel matters, and parties to an investigation are encouraged not to discuss details in order to ensure full and impartial fact gathering. With that said, parties to complaints of this nature are not obligated to hold details in confidence – largely because it is their personal story. The broad distribution of details led to workplace protests, expressions of distrust of leadership, impassioned calls for greater transparency in handling of sexual harassment complaints by Human Resources, and a demand for review of sanctions levied on parties found responsible for violating policies. Leadership responded by convening a task force to examine current policies, to research best practices in sexual harassment response and prevention, and to recommend a plan of action.

<div align="center">

Section 2
Contemporary Human Resources Management Issues

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Chapter 6

Vance Johnson Lewis, University of Central Arkansas, USA
Jason L. Eliot, University of Central Oklahoma, USA

Like many healthcare providers, Shepherd's Grace Hospital struggles to appropriately staff their Emergency Room. Electing to follow employment trends, the hospital has engaged with a staffing agency for four traveling nurses. The purpose of this case is to explore the challenges of bringing contingent workers into an organization and how these short-term employees are viewed by the others more permanently embedded in the organization and the community. Also of importance is how social and psychological capital develop within an organization and how these roles can conflict when translated into a leadership role. This case follows four days of events for a traveling nurse, a traditional nurse, the Director of Nursing Services,

the Director of Human Resources at the fictional Shepherd's Grace Hospital in the real city of Little Rock, AR. Upon conclusion, readers are asked to analyze the actions of these four characters along with the interactions of their circumstances (personal, professional, and geographic) to make decisions for how the hospital should move forward.

Chapter 7

Dāvis Auškāps, Stockholm School of Economics in Riga, Latvia
Dans Rozentāls, Stockholm School of Economics in Riga, Latvia
Dmitrijs Kravčenko, Stockholm School of Economics in Riga, Latvia

It is far from uncommon for entrepreneurial SMEs to rely on outsourced labor, especially in knowledge-intensive industries. There is a plethora of benefits to doing so – quick and cost-effective access to highly skilled, self-motivated workers is certainly appealing, especially for resource-limited enterprises. That being said, outsourcing may also raise a range of issues, including loss of control, limited retention of knowledge, and communication challenges, as well as to exert unsustainable levels of pressure on a typically weak or non-existent HRM function of such organizations. This case study considers the case of five small Latvian tech firms and their relationships with outsourcing work to freelancers. The authors raise questions about the feasibility of effective HRM practices and potential for meaningful business growth, and observe how SMEs mediate their inherently precarious relationships with freelancers by bringing desired individuals into the orbit of the organization through relationship-building.

Chapter 8

Niveen Labib Eid, Birzeit University, Palestine
Devi Akella, Albany State University, USA

This case study highlights how various human resources management (HRM) policies and practices at ENTI, a Palestinian non-governmental organization (NGO), can be deconstructed as depersonalized forms of 'workplace bullying' which exert a totalitarian form of control and domination over employees. It further examines how external sociopolitical forces at the macro level can be held responsible for management's autocratic regimes, where employees are closely monitored and psychologically controlled. In pursuit of explaining the complex dynamics of employee relations, workplace bullying, and HRM, the case utilizes an interpretative inquiry based on critical theoretical lens of Foucault's disciplinary power frameworks. HRM in rhetoric is a management responsibility which is primarily concerned with employees, their welfare, growth, and development. However, this case reveals the complete opposite, in the form of startling, critical insights from an under researched

sector, that of the (NGOs) which have been historically envisaged as altruistic organizations and ideal workplaces.

Section 3
Emerging Human Resources Challenges in Higher Education

Chapter 9

Anton Sabella, Birzeit University, Palestine

Since its founding under the Israeli occupation, Bir Zeit University has been the catalyst for educating the Palestinian 'generations of occupation'. Its mission was to empower those who were bereft of their basic human rights and to reclaim and develop the Palestinian national identity by resisting the stultification of Palestinian youth. Following the Oslo Accords, Bir Zeit University has experienced several important developments, namely exponential growth in enrolment, unnecessary programmatic expansion, introduction of super-size classes, and irresponsible staffing decisions. Against this background and a growing financial crisis, this case study examined how managerialism has succeeded in subduing Bir Zeit University to its syllabus, specifically how cultural and structural changes have led to compromising the work conditions and relationships of faculty members. Hence, this case study bids the question—Whither Bir Zeit University?—to those who care to question the present state of affairs as well as anyone ready to search for answers.

Chapter 10

Niveen Labib Eid, Birzeit University, Palestine
Mays Dahadha, Birzeit University, Palestine

This is a case of employee relations challenge at ASE, a Palestinian higher education institution (HEI). It reflects on real narratives and experiences of an accumulative and an endured conflict between ASE's labor union and its top management due to rigid administrative policies and pitfalls while transitioning through a strategic reform. The case urges readers to revert to the roots, envisage, and analyze 'internal employee relations under crises' from a dialogical and a sociopolitical perspective based on ideas drawn from the Habermas's 'Theory of Communicative Action' (TCA). HEIs are envisaged as sovereign workplaces that function on pluralistic values generating positive dialogue communication between all stakeholders and subsequently healthy employee relations. This case examines different episodes where ASE's management utilized autocratic leadership for utilitarian drivers causing employee exclusion and mounting tensions on campus. Consequently, several forms of overt resistance prevailed including strikes, apathy, and work interruptions.

The case presents a detailed snapshot of a staff employee well-being initiative developed and implemented by the Human Resources (HR) department in August 2014 at the Online Learning Unit (OLU) of J.M. College located in southwestern Georgia. The case is an auto-ethnographic account of how implementation of an employee quality of life (QOL) initiative combined with surveillance techniques resulted in a negative toxic culture of employee resentment, hostility, and poor performance. Using modern surveillance theories of synoptican, actor-network theory (ANT), and surveillance capitalism, the case shows how the original Foucauldian theory of panopticon has re-invented itself into a panopticon of technology dominated by a culture of capitalism and profit-maximization. The case uses pseudo names to protect privacy and maintain confidentiality of the institution and characters. The case accurately details events in a chronological manner focusing on the main character's thoughts and actions.

Section 4
Critical Perspectives in International Human Resources Management

This chapter explores how three South African MNCs ventured north into Africa and what this meant for their practice of HRM. The chapter highlights how each company developed their HR systems under late apartheid, and how they have been adapted since then. It explores what their investments meant for local firms and for workers more generally in their countries of operation. Two of the three firms have placed a strong emphasis on internal HRD and human resource planning orientated towards developing the careers of their staff up to senior management; the third has followed a more mixed model that has not been without controversy.

Preface

The practice of Human Resources Management (HRM) has increasingly been dominated by the positivistic methodology with emphasis on using mainstream approaches to resolve HRM dilemmas, rendering its assumptions as naïve, highly simplistic and problematic when considered under a critical lens (Bolton, 2011). The critical perspective which gained prominence within the UK literature in 1990s (e.g., Alvesson & Willmott, 1992, 2003; Braverman, 1974; Fournier & Grey, 2000; Grey & Willmott, 2005 etc.) questioned different functions and techniques of management drawing upon the voices of Frankfurt School of critical theory, philosophies of Michel Foucault and Karl Marx, and Feminism and ecological perspectives. HRM as a role and function within organizations, gradually gained the rapid attention of the critical theorists (Blyton & Turnbull, 1994; Legge, 1995; Storey & Sisson, 1993) who argued that there existed contradictions within the field of HRM which resulted in a gap between the rhetoric and the practical reality. The critical theorists argued that HRM as a mainstream approach, was conceptualized as a managerial function, which emphasized employee collaboration and cooperation, employee participation and commitment, which was achieved through dialogic communication and people-oriented leadership strategies. However ironically, such employee-oriented management techniques were not universally used within organizations. Employees therefore remained relegated as a factor of the manufacturing process. A continuation of the principles of Scientific Management which reduced employees to mere tools of the overall production process (Legge, 1995).

The theoretical underpinnings of HRM were not replicated in practicality, there was a lack of integration between what organizations were required to do and what they did (Becker & Gerhart, 1996). HRM thus despite all its good intentions in rhetoric ended up exploiting employees (Skinner, 1981). HRM became a 'just in name function', where management sought the support of the employees under the pretense of employee welfare and concern (Armstrong, 1987). HRM assumed the garb of soft control, insidious and subtle control measures, took the form of a "wolf in sheep's clothing" (Keenoy, 1990), where management created the impression of

being concerned about their employees to seek their willingness and subjugate them to managerial will and authority.

There is a need to revisit these critical views and perspectives, to make it more contemporary and up to date. Simply because HRM has evolved in the last few years, as a result of complexity of change and evolving trends in work patterns, change in the values of society, increasing use of technology and a gradual but a strong interest in ethics, diversity and inclusivity, humanistic and caring leadership, dialogic communication, employee welfare and development. With the sole objective of exposing power discrepancies and to initiate a healing process through integration of different theoretical frameworks and philosophies to design more democratic and equitable workplaces.

This book, an edited volume of teaching case studies, is one such endeavor by the authors, to compile a collection of practical and latest examples from the corporate sector, public sector, educational sector, not-for- profit organizations and community-based organizations from across the world to provide critical insights to students within the classroom, provoke them to think about HR and its functions so as to spur them, to encourage them, to become more ethically conscious managers and citizens.

RATIONALE AND TARGET AUDIENCE FOR THE BOOK

This edited volume, a collection of corporate case studies from across the world, critically reviews different aspects of human resources management, its origin, role and responsibilities, functions and the future of human resources management in the context of changing patterns of work, society and the world.

This book will prove to be a useful resource within classrooms when teaching students to think critically about human resources, especially in the context of cross-cultural implications. The target audience would be undergraduate and graduate students of human resources management, academicians, and practitioners of human resources management. It would also turn out to be useful for organization development consultants.

CONTENT AND LAYOUT

The chapters in this book have been grouped into four sections representing four varied themes: (1) Critical Perspectives in Human Resources Management, (2) Contemporary Human Resources Management Issues, (3) Emerging Human Resources Challenges in Higher Education Institutions, and (4) Critical Perspectives

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in International Human Resources Management, thereby endeavoring to provide a holistic portrayal of critical challenges currently facing human resources management.

Section 1: Critical Perspectives in Human Resources Management

This section contains five chapters that deconstruct human resource management, its role and responsibilities in contemporary organizations, in the context of outsourcing and strategic decision making, succession planning, trust and leadership during times of crisis and violation of employee rights and dignity.

Chapter 1 traces the career progression of Robert Peters, whose ideology of HRM undergoes transition as he progresses from a lower level executive to a HR manager over a period of years. The readers are able to analyze the hidden depths of HRM as Robert circumvents different dilemmas in his career graph-- being ordered to spy on employees prior to the advent of trade union activity within the organization, role of HR during a merger, and employee disciplinary actions. This case study enables readers to critically reflect on HR responsibilities and its boundaries within contemporary organizations.

How technology influences our lives, including our work habits, in ways of incalculable value continues to attract the attention of both scholars and practitioners. The case study of Chapter 2 is specifically interested in this; it is a demonstration of how the adoption of new technological forms of work organization, i.e., sourcing platforms, could bring in valuable benefits for the organization as well as refine its approach to the challenges that exist in day-to-day routines and strategic missions.

While Chapter 3 is the story of a premier Indian shipyard, and the resilience and commitment exhibited by its leader during times of crisis. The case study highlights critical issues pertaining to crisis management, transformational leadership and how appropriate behavioral tenets displayed by the leader can safely maneuver an organization from destruction and losses. Acknowledging the underemphasized role of leadership in HR, the case study contributes by focusing on the leaders, their importance in terms of employee training and development, designing appropriate organizational culture and strategies which can be adopted during times of corporate crisis.

Talent management happens to be another important HR responsibility, which encompasses attracting, recruiting, and selecting talent required by an organization to meet its strategic goals and objectives and succession planning which ensures talent at the top managerial levels is sustained. In this context, Chapter 4 is an interesting case study based on Zforce Government Solutions (ZGS) which forces the reader to critically reflect on the factors behind organizational mismanagement of human talent, and the importance of Soft HRM model. The case study explores

relevant issues pertaining to employee loyalty and retention, organizational culture, and succession planning and their impact on talent management.

Changes in workforce demographics has focused HR's attention on employee diversity and workplace inclusivity. Chapter 5 contributes here with a case study which revolves around a fictionalized case based on a real-life event, a sexual harassment episode at a higher education institution (HEI) and the response of its top administration. This case is different, in the sense it does not focus on the actual sexual harassment episode, nor the victim or the perpetrator but instead looks at the role of HR in designing diverse and inclusive workplaces-- how sexual harassment complaints need to handled, development of organizational policies and procedures, creation of open and transparent workplaces which are able to protect employees' dignity and respect while at work.

Section 2: Contemporary Human Resource Management Issues

Section 2 continues, just more in-depth, with the exploration process of how changing workforce demographics and nature of work has impacted HRM, and how HR's inability to effectively adapt can result in top management making wrong decisions in terms of recruitment and selection, employee development and leadership.

Chapter 6 is a case study which critically illustrates the challenges faced by contingent workers within hospitals (i.e., in specific traveler nurses), emphasizing aspects such as lack of proper orientation and training and its consequences in the form of poor quality patient care and high risk customer outcomes. The case study encapsulates significant human resources deficiencies faced by contingent workers by reviewing the personal and professional experiences of four nurses at a fictional hospital in Arkansas, allowing the readers an opportunity to capture HR problems associated with social and psychological development of human capital, and how HR can fail in this responsibility given the new types of contemporary structural designs and nature of work.

Managing Small and Medium Size Enterprises (SMEs) in this globalized world is becoming a real challenge for most of the entrepreneurs. The evolution of the fourth industrial revolution along with advancement in the internet communication technologies resulted in an unanticipated entrepreneurial boom in Latvia. Chapter 7 highlights this phenomenon as an industrial opportunity from one side while elaborating on the deficiencies in managing temporary staff from the other side. The case presents facts from five different Latvian IT SMEs which shared parallel HRM pitfalls in managing, developing, rewarding, and retaining their freelancers who also served as temporary staff. The case enlightens the readers and entrepreneurs at similar SMEs to rethink their mainstream and intuitive managerial practices/models (i.e., Resource Based View for talent development) while practicing HRM. This is

especially true for SMEs which adopt traditional outsourcing as an alternative staffing solution without trying to innovate alternative staffing and retention strategies that address the expectations of both employers and employees. This case emphasizes that at particular stages of SMEs' business lifecycle, SMEs are expected to restrict their full dependence on alternative staffing and temporary work in pursuit of growth.

In Chapter 8, the case study focuses on the disconcerting issue of employee bullying that is thought to be on the rise particularly within the NGO sector. Using Foucault's conception of '*power, discipline and control,*' Enti case study exemplifies the pervasiveness and endemic nature of a repressive culture phenomenon, even in an organization whose sole mission is to provide different types of support and services to victims of domestic violence. The case allows readers to analyze and reflect on how common HRM practices of job analysis, training, compensation, and disciplining can be deconstructed as insidious forms of workplace bullying, or rather 'depersonalized bullying'. The case urges readers to critically examine the implicit causes of the workplace bullying phenomenon using a sociopolitical perspective.

Section 3: Emerging Human Resources Challenges in Higher Education Institutions

Higher educational institutions (HEIs) are workplaces of academic learning and student development (Hardin-Moore, 2019). Institutions consisting of loosely defined autonomous structures, which provide faculty flexibility and autonomy to teach and research with job security or tenure (Smith & Cole, 2018). Yet integration of critical perspectives exposes another façade, that of workplaces rampant with power and politics, ridden with manipulation and oppression.

For instance, Chapter 9 happens to be a passionate eulogy on Birzeit University in Palestine, located in a conflicted geographical area and experiencing the onslaught of managerialism and subsequent marketization of education with emphasis on profits instead of public good (Thornton, 2004), dominance of administration over the faculty resulting in declining workplace relations and professionalism (Zabrodska & Kveton, 2012). The case study covers problematic dilemmas facing HEIs across the world, forcing the readers to reflect about the future of HEIs and educational services.

Chapter 10 presents the dwindling effects of the antagonism and hostility existing between the labor union and the management at a Palestinian HEI referred by the pseudonym ASE. The authors, use Habermas '*Theory of Communicative Action,*' (TCA) to initiate a discussion on the implications of consistent acerbic disagreement between labor and management on almost all issues; particularly addressing the issues of dialogue vs. tension and engagement vs exclusion. This case, gives the readers an opportunity to critically reflect on the sources of tension between managers

and employees. Though, it simultaneously urges readers to embrace a pluralistic perspective with a focus on HRM. The case also provokes readers to appreciate the importance of proactively embracing effective internal employee relations management in contemporary academic institutions which have so far been presented as ideal workplaces. Yet as also substantiated in Chapter 9, academic workplaces show a clear preference for the assumptions of 'new managerialism'. In this context, Chapter ten case study encourages the readers to appreciate how cultivating quality relationships in contemporary organizations can positively influence employees' communicative rationality and actions during crisis and vice versa.

In continuation with our discussion on HEIs, these organizations tend to emphasize social missions and employee wellbeing, focusing on wellness programs to protect, preserve and improve employees' mental, social, physical, and psychological health. Chapter 11 however deviates from this popular notion, by revealing the negative side of these wellness programs and their vicious intentions. The case is about a female researcher called Nina who works at a college and how she and her colleagues participate in a mandatory four months wellness program, which leaves them feeling threatened and vulnerable after being proctored via video cameras and other surveillance methods. They feel pressured to act faster and work harder to comply with the employer's expectations during the entire program duration. The wellness program was envisaged by Nina and her supervisor as a disciplinary tool. In fact, when her supervisor raises complaints about the program, she is immediately fired. The application of HR practices including wellness programs in this fashion results in counterproductive effects including the creation of a toxic workplace climate combined with negative psychological and social ramifications. The case uses a post-modern critical theory of surveillance to explain the complex phenomenon of quality of life (QOL) initiatives at contemporary colleges.

Section 4: Critical Perspectives in International Human Resources Management

In this globalized world and just before a few decades until this current period, Multi National Enterprises (MNEs) expanded internationally and globally while facing recurring yet manageable restrictions due to the emergence of collaborative arrangements such as international free trade agreements, conglomerates, and governmental support. However, MNEs are facing novel challenges and dilemmas while managing their diversified workforce and attending to the national expectations of a politically and culturally congested world.

In this context, our book of cases invites scholars and practitioners in Section 4 to rethink about the mainstream research on International human resources management (IHRM) which by solely concentrating on American MNEs, has failed

to examine how IHRM operates in different contexts such as those of the developing or emerging countries. The book calls upon authors to adopt a broader pluralistic view which encapsulates a critical comparative research that seriously delves into more societal embedded organizational phenomena especially those which MNEs operating in developing countries encounter in the form of lack of basic institutional frameworks which can guide expatriates in managing their businesses and labor relations complex dynamics (Caldas, et al. 2011, Sparrow, 2009). Authors are encouraged in this section to reflect on real experiences of MNEs which operate in under-researched contexts while drawing on the lens of an institutional perspective, neo-institutional theory, and cross-cultural perspectives.

Chapter 12 presents a unique case of three different MNEs which while penetrating the African continent, encounter talent acquisition and employee relations challenges. All three MNEs have to confront historical legacies consisting of racial discrimination and unequal access to education given the South African notorious apartheid policies. The case provides two opposing scenarios faced by two MNEs on one side and that of a third MNE on another side. The first two MNEs were able to overcome hindrances faced, through adoption of an internal career-oriented approach to human resource development and workforce planning, thereby demonstrating a commitment towards further expansion of the South African economy in a post-apartheid era. While the third MNE was unable to effectively grapple with the racial division of labor in a mining business, resulting in antagonistic employment relations, making it difficult to roll out more cooperative HR paradigms within the industry. This makes it difficult for the enterprise to normalize issues faced, restricting its expansion, and eventually contributing towards its decision to exit the African market. This case study thus looks at novel challenges which expatriates and local managers can meet with, as their organizations continue expanding globally and how these IHRM adversities can be mitigated using effective HR policies, and through enforcement of equal rights practices and diversity management strategies.

CONCLUSION

We conclude this preface with a realization. Well into the second half of the twentieth century, a new realization was beginning to unfold in the life of the organization, thereby transcending those basic convictions of success that were held dearly in previous epochs. It is the knowledge worker as first conceived by Peter Drucker in his book 'The Landmarks of Tomorrow' (1959). Dominant convictions of the nineteenth century – producing the same commodities that others are producing but with less resources – and that of the great part of the twentieth century represented by a shift towards what is known as 'strategy' or creating a competitive advantage,

were overshadowed by this new realization of the knowledge worker. In essence knowledge work differs from previous forms of work. It can only be effective if fastidiously specialized, which implies that the knowledge worker holds the means of production and they are mobile. With this in mind comes two important realizations in the field of HR. First, that knowledge workers are increasingly seeing their knowledge area as what characterizes them, not their employing organizations. Second, organizations will be effective only if they become dexterous in managing knowledge and knowledge workers. This realization is thought to change the organization of the future much more than any other feature (e.g., technology, e-commerce, or regulatory frameworks).

Unanimously, the cases presented in this edited book agree that the essence of HRM is how to effectively manage the human resources and make them more productive. The success and sustainability of any type of organization will most likely hinge on its ability to manage the knowledge worker and, therefore, provide the supportive climate for them to produce freely. As many of the case studies have tried to show, HR in its newly realized conception of the advent of the knowledge worker indicate that the shape of successful organizations will increasingly be determined by knowledge workers themselves.

Finally, we like to leave you with two suggestions after reading one case at a time. To ask what the issues and challenges are, and what they mean to you as a professional, a manager, a knowledge worker. Once you have reflected on this, ask yourself what action should be taken to improve things.

Devi Akella
Albany State University, USA

Niveen Eid
Birzeit University, Palestine

Anton Sabella
Birzeit University, Palestine

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Devi Akella
Albany State University, USA

Niveen Eid
Birzeit University, Palestine

Anton Sabella
Birzeit University, Palestine

Section 1

Critical Perspectives on Human Resources Management

Chapter 1

HR:
For the People?

Rachelle K. Scott
Albany State University, USA

Devi Akella
Albany State University, USA

EXECUTIVE SUMMARY

This case study follows the career of Robert Peters (pseudonym), a middle level manager who faces numerous challenges as a team manager during his fledgling years. He is constantly questioning his role as the managerial representative who has to take care of his team members, their interests, and professional welfare. Scenarios such as the ethicality of senior management in ordering their lower level managers to spy on the employees during unfolding of trade unions activity, employees' rights during various change processes, disciplinary actions taken on employees which may lack human compassion, and issues pertaining to equity due to bias and nepotism are explored. This is an effort to understand the unequal quotient between labor and management, hidden depths in human resources (HR) role and functions, and ethical dilemmas which HR managers confront during their corporate career. This case study will enable readers to critically reflect on the responsibilities of HR, including its challenging role as the intermediary between the labor and management.

CASE STUDY BACKGROUND

Robert Peters is a middle level manager who works for a major advertising and sales company based in the United States. He is employed within the manufacturing sector and is responsible for overseeing people and processes within the business. Robert studied engineering and management in college and started with this company upon graduation. He was given extensive entry-level training, and amassed additional capability through practical application. Robert was also introduced to the company's various HR policies and procedures as a part of his comprehensive onboarding. He aspired to become a personnel manager at some point later in his career and had a great rapport with people in general. At that time, the company hired its managers at the ground level to allow them to build skills on the front line as a basis for growth within the organization. The business model also enabled operations level personnel to lead various aspects of the production process. Along with other employees within the organization, Robert ensured production requirements were met to deliver customer orders. For fifteen years, he advanced through the ranks with a respectable level of success, but not without meeting his share of challenges.

At the start, Robert was a team level manager responsible for four operating shifts of personnel. The workdays were long, and the requirements were intense, but teamwork was among the best in the field. Robert had a work ethic that made people want to do things he asked of them. He garnered the respect and adulation of his team, being regarded as a dependable and a caring manager. When employees had a personal need, Robert would go out of his way to make sure it was satisfied to the best of his ability. He knew many of the team members on a personal level and would talk with them about their hobbies or outside work interests. Robert also knew names of their family members, and frequently inquired about their well-being. He was considered a genuine person – someone the teams could talk to and confide in. The people within his department trusted Robert and this relationship yielded stellar results. Through strong system execution and a workforce of supporting technicians, Robert was promoted to department manager. In this new role, Robert's responsibilities expanded, and workload expectations grew in multiples. Even then, he still had close contact with the team and desired to do all that he could do for them. He continued to ensure team celebrations were scheduled when results exceeded target and prioritized service anniversaries and other milestones. Robert enjoyed the fruits of his labor, but he faced many unexpected challenges along the way. These issues are tied to conflicts between management and personnel in Robert's care, which he must navigate tactfully for the advancement of his career.

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SETTING THE STAGE

This case study combines the theoretical lens of the labor process theory, a paradigm of critical management studies and the systems theory and path goal leadership theory from the functionalism perspective to fully explore and deconstruct the complexities surrounding human resources management as a managerial function and a manager's responsibility. The integration of a critical and systems perspective would enable comprehension of human resources management (HRM) holistically, in terms of understanding the power intricacies inherent within HRM due to the unavoidable class conflict existing within the production system, and the outlook of the HR practitioners or managers who try to reconcile the tensions between the management who is responsible for their monthly paycheck and further career advancements and the needs of their subordinates while at work (Keenoy, 1999). HRM, as a subjective discipline and managerial responsibility can be described as a highly complexed reality, not capable of neatly fitting into any specific theoretical framework (Gill, 2007).

Labor Process Theory

Labor Process Theory (LPT) is a theoretical perspective derived from the capitalist labor process and conflicted workplace relations (Alvesson, Bridgeman & Willmott, 2009). LPT revolves around concepts such as capitalist production systems, relations between management and labor, with emphasis on surplus maximization and profitability. According to LPT, the whole capitalistic society can be divided into two parts: the labor and the management. The capitalist invests the capital into the instruments of production, hires labor power to transform the raw materials into products which s/he can sell in the market for a profit. While the labor is forced to sell its labor power in exchange for wages. The focus of the entire manufacturing process is to earn a profit (Marx, 1970; Braverman, 1974). In addition to the capitalist owner and the labor, there also exists another class of employees known as the managers, who are the intermediaries between the capitalist and labor. The managers are responsible for directing and controlling the labor on behalf of the capitalistic owners. The managers are thus placed in a contradictory position, they possess power which however is restricted being themselves salaried employees within the corporation (Marx, 1970; Braverman, 1974).

With gradual introduction of mass production, division of labor, labor got further reduced to being, a mere tool, or piece of equipment which could easily be replaced in the entire production process (Milkman, 1997). Labor ended up performing monotonous and repetitive tasks, while the capitalist constantly explored methods to maximize his/her profits. This resulted in designing of new types of control

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mechanisms, social and technical frameworks, structures of power and domination to minimize all forms of labor resistance and seek their absolute cooperation and acquiescence (Burowoy, 1979; Edwards, 1979; Friedmann, 1977). Control mechanisms became more insidious and hegemonic underlined with humanistic undertones to secure employee compliance (Akella, 2003).

LPT as a theoretical framework has been used to examine different types of control modalities, and their level of effectiveness in controlling employees to increase profits (Burowoy, 1979; Edwards, 1979; Friedmann, 1977). All management models, such as Quality circles, Business Process Reengineering, knowledge management and learning organizations have been deconstructed from the contested labor-management angle as exploitation regimes ridden with power dynamics (Akella, 2003; Edwards, 1979).

Later studies on LPT, also debated about the "missing subject" (Willmott, 1990, p. 3). The emotions, and cognitive abilities, in the context of individual subjectivity was finally acknowledged (Thompson & O' Doherty, 2009). Some tried to overcome the issue of subjectivity by arguing in the favor of totalizing control regimes which imposed absolute surveillance over the employees, developing them into corporate clones or designer employees, in the process completely obliviating the notion of employees resistance (Collinson & Knights, 1986; Thompson & O' Doherty, 2009). While others argued against the futility of ignoring employee resistance, and the ability to completely dominate employees physically, emotionally, and socially (Akella, 2003).

LPT thus is effective in examining different types of working environments, employee resistance strategies, and mechanisms which could be used to democratize workplaces to create more humanistic and collaborative environments (Thompson & Newsome, 2004). LPT is a critical lens, which allows one to be critical about corporate functioning, labor conditions, employment relationship, i.e., be critical about all labor-oriented functions and issues (Thompson & O'Doherty, 2009). LPT possesses the capability to widen the boundaries of Human Resources Management, by giving voice to the employees, their problems, issues, and difficulties.

Systems Theory and Goal Path Theory of Leadership

The second theoretical lens, approaches organizations and the HR function, in the context of systemic interconnections (Anderson, 2020). Organizations like living organisms, consist of patterned activities of corporate owners, managers, stakeholders, and employees (Katz & Kahn, 1966). Systems theory explains organizational forms, similar to a big social machine, which takes in inputs in the form of raw materials, transforms them using human effort into final outputs such as goods and services which are sold in the market. Further, organizations as systems also operate as "*open*"

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entities which are influenced by the happenings in the external environment. In other words, the organizational system is interconnected at both internal and external levels. All departments and functions, of the organization, connect and aid in the overall organizational functioning (Anderson, 2020). All departments exist as subsystems which relate and depend on each other to function as a single unit (Anderson, 2020).

Systems thinking conceptualizes the organization as a combined sum of parts, where the people, processes, structures, and policies are all interconnected into a web of relationships. And disturbance at one level can cause issues at the other end. For instance, changes at the environmental level, in the form of new legislative policies would demand the organization adapt accordingly. Poor quality inputs would automatically create problems with the final outputs. Again, incomplete, and erroneous information would result in problems in the entire production processes. Managers help in ensuring all parts of the systems are functioning properly and channel the feedback into relevant internal areas to increase systems functioning. All systemic units are interdependent on each other, and problems in one subsystem would automatically create problems in other parts of the system (Senge, 1990). The systems theory does provide a simple common-sense approach to understand organizations and their overall functioning (Anderson, 2020).

HRM, from a systems perspective emerges as a function which is used to manage human input, attract labour, recruit labour, determine employees' compensation packages, and in administering and directing labour to allow efficient functioning of the entire system. If the human factor is neglected, this would automatically cause problems at other systemic levels and units, leading towards the conceptualization of a workplace setting where employees and the management can harmoniously work together to ensure optimum organizational functioning and efficiency. There can be a fair exchange of work and pay, ebbing and flowing within a symbiotic relationship. With employee welfare and development becoming integrated within the strategic objective of the corporation, resulting in a fusion between employee and employer outcomes. Workers and their welfare would now be placed at the centre of HR policies and practices, resulting in high employee performances and satisfaction levels. With mutual gains for both the employer and the employees, taking the form of low labour turnover and improved productivity, greater employee autonomy and empowerment, worker self-control and employee participation within the corporations (Boxall & Purcell, 2003).

Managers in this systemic context, integrate appropriate leadership styles to motivate and protect their subordinates. The Path Goal Theory of Leadership is a theory of task and person, which is not concerned with the entire organization, just the coordination of work within a single corporate unit. This theory highlights the leader's behavioural characteristics which support and guide subordinates in fulfilling their goals in a productive manner. Here the leader's role is to align

subordinates' roles, responsibilities, and duties with the organizational goals to maximize accomplishment of goals at all levels (House & Mitchell, 1974). The focus of the leader is on coordinating the work of subordinates to ensure accomplishment of goals, which are in perfect alignment with the organizational objectives (House & Mitchell, 1974).

PROBLEM/DILEMMA AND CHALLENGES FACING THE INDIVIDUAL

As the team level manager, Robert was often caught between employees and management. He constantly had to wrestle how to resolve his responsibilities as a representative of management and as leader to his team members. At his core, Robert knew that he had a responsibility to those individuals under his span of control, but he was inexplicably challenged to execute policy that did not feel people centric. Despite his education and training Robert realized he was not prepared to handle the intricate power modalities which surrounded people management. He found himself caught between what was being requested by upper leadership and what he deemed fair for his subordinates. Robert found it puzzling that management tended to interpret employee welfare as contradictory to organizational efficiency and profitability (Marx, 1970, Braverman, 1974; Thompson & O'Doherty, 2009).

Straddling the Fence

Robert's first challenge arose within a few years of his career when members of the workforce became disgruntled about the environment and conditions under which they had to work. The business had just been acquired by another company, and new policies made the employees become a bit uneasy – especially as it related to the impact on their retirement accounts. During the transition, a "culture clash" occurred due to a small family owned company being acquired by a major conglomerate. Pension funds were replaced by shares of stock. Eventually it progressed to the point of a union campaign. A union-led employee base was not a welcome change for the company, so management was not in favor of this mounting effort. While leadership had their sights on profit and productivity impact, the personnel were thinking about their livelihoods and how a union might protect their best interests. In these situations, management usually adopts devious tactics to undermine all forms of trade union activities. While some managerial techniques are direct and open, others can be more subtle in nature (Burowoy, 1979; Edwards, 1979).

Robert being an intermediary, a representative of the management, was saddled with this unpleasant responsibility. In his words, "*Upper management turned to its*

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day-to-day managers…and said you need to tell us what these people are thinking and saying". He was being asked to share information that he heard regarding a union campaign and to disclose who the "*hot heads*" or "*thought leaders*" were by name. If he happened to be at a lunch setting or offsite and became aware of anything pertaining to union activity, he was asked to immediately relay it back to the leadership. Robert was also ordered to communicate with employees using the grapevine channel and dissuade them from participating in union activities.

Many of these operators were individuals that Robert had come to know and care about, many of whom were like family members to him. He did not want to spy on them or betray their hard-won trust. But Robert also knew that he could benefit from doing a good job for the company, with pay raises or promotion to the next level. This was most certainly an example of labor process theory playing out in Robert's career. Senior management operated through a means leaving employees bereft of confidence that leadership cared more about profits. It appeared to be a labor-for-wages only exchange, without the personal entanglement. He was in a quandary of not knowing what to do. Should he adopt a deontological stance and side with the employees or as a utilitarian side with the leadership, who were operating under the premise that the ends justified the means from a financially motivated viewpoint? Or from another perspective should he choose personal interests over moral values (Micewski & Troy, 2000)?

How could one be successful straddling the fence between management and labor? Robert knew that the company did not want a union to be organized, but he did not want the people he cared for to be taken advantage of either. Robert felt extremely conflicted when considering his values for integrity and trust. He also had developed a loyalty to the company and did not want to disappoint his leadership. During this time, Robert saw HR in a different capacity than he thought in prior years. Until now, he thought the role of HR was to protect the people. Anyone with a problem should be able to reach out to an HR representative and have a solution that benefitted the individual, at least that is how it worked in his mind. Now, with what he had been tasked to do, his perception changed. Robert surmised that the primary role of HR was to mitigate risk for the company and foster an environment that protects its interests (Burowoy, 1979; Edwards, 1979; Friedmann, 1977). In the process, Robert stated that he felt "*used*". Ultimately, Robert gave the management just enough information to safeguard his job. He was uncomfortable doing so but needed the secure income to support his growing family.

Navigating New Territory

The union campaign was defeated, but Robert wondered if that outcome was a winning situation for all involved. He did not want to base his decision to separate from the

company on one challenging situation, so he remained loyal. Robert transferred to another location within the company, which had become an industry leader with competitive pay and promotional opportunities. He was placed in a department leader position and had a fresh outlook on his career, ironically in a union-run location. Robert had to understand the culture of this new location and what was expected of management in this facility. He invested time in learning about the people and processes, and quickly settled in.

As was common with large corporations, Robert's company evaluated the financial profitability of their product portfolio to determine the winners and losers. All underperforming businesses were being divested and replaced with high revenue generators. In other segments, production volume was reallocated to lower cost-based locations. During this time, Robert's production site underwent major transitions. Several products had already been moved to locations throughout the country where they would not cost much to manufacture. There was only one merchandising item remaining in production. Through market analysis and consumer trending, the corporate leaders determined it was best to relocate operations for this segment of their business. While the decisions are made at upper levels of the organization in a central office, the local operation is tasked with execution activities. In this case, Robert was asked to coordinate the activities related to plant closure.

The fact that the manufacturing plant would be closing its doors was devastating enough, but the people were more mystified because they thought leadership would protect them from an event such as this. After all, wasn't that their role? While the union kept their end of the bargain, there were hardships endured as a part of the transition process that were attributed to HR. Front line employees were forced to change work schedules and flow to a team or role that added a personal burden. Those who accepted the new positions would be operating equipment that was unfamiliar to them, and perhaps they were a bit intimidated to learn a new skill. Other managers were handling the transition aspect of the plant closure, where selected employees would be transferred to the new location. Some tenured personnel retired instead of relocating to the new business, whereas others felt forced to remain and work in unfamiliar territory because they had less years of service. Robert reflected that, "*We needed to have just as much focus on supporting the people as we did supporting the business*". He saw the benefit in a systems theory approach, whereby each of the parts are interdependent and need to remain in balance to deliver a successful outcome (Anderson, 2020).

However, the company's culture was founded upon Labor Process Theory, where labor was a commodity that could be exchanged for wages (Marx, 1970; Braverman, 1974; Burowoy, 1979; Edwards, 1979). There was little that could be done to safeguard the jobs of the employees in this union environment. Robert realized that, "*every single person was going to have a change to their life*" – even

himself, because the doors were closing. Nevertheless, Robert was intent to help personnel make the transition as smooth as possible. Town hall meetings were an effective means of keeping everyone informed. Dialogue was the key to maintaining a calm and collected workforce, or at least as stable as could be expected under the circumstances. Robert and his HR colleague walked the employees through options pertaining to severance packages, retirement benefits or continuing education. The more informed the employees were, the better decisions they could make for themselves and their families. What was clear to Robert is that although other leaders were interested in assisting the employees, they preferred to talk with him because of relationships and trust established throughout prior years. Robert listened intently and captured questions and concerns of the people. He acted with empathy, but he was unable to completely allay their fears. Robert wondered what else he could do to remediate the uncertainty overwhelming the workers.

The Change Agent

Robert realized the issues he and the other employees were facing were not unique to their situation. Not only do HR challenges exist within divestitures or closures, but also when a company acquires other businesses. This was true of the next location Robert transferred to at the mid-point of his career. When a merger occurs, the assumption may be that only the best in class systems and people remain. This is not the case! Robert found himself joining up with an organization which had recently been acquired by the parent company he had dedicated more than a decade to serving. In this atmosphere, there were some standards that were clear and others that were not so easy to understand. Some of the integrated policies made people feel undervalued. Perhaps the company underestimated the role of HR during a massive change such as this. Now himself an HR manager, Robert was able to actively influence various decisions and site policies with employees and their best interests in mind.

Robert understood that HR has a key role in setting the culture of the organization. He wanted not only to govern policy but be a change agent within the system. His desire was to protect and serve both entities, ensuring compliance with the law and demonstrating compassion towards the workforce. Robert wanted to develop a high performing organization and build trust among its people. Robert had correctly envisaged labor was an integral factor in the overall success of an organization, employees, their interests, and welfare, ensured higher levels of employee commitment and satisfaction, and organizational productivity (Boxall & Purcell, 2003). Not only was output important to leadership, but the well-being of the employees also had a centric focus. Robert therefore became intent on raising the bar in HR, whereby their reputation would become one of adding value to the organization. He was an active

representative, looking for moments of truth to win the trust of the people. Robert thus emerged as a leader primarily concerned with aligning his subordinates' roles and interests with the overall objectives of the organizations, thereby embracing a leadership style which fit in with the Path Goal Theory of Leadership (Senge, 1990; House & Mitchell, 1974).

Robert noted inconsistencies between the plant locations, in terms of corporate policies and their interpretation. He made it his priority to overcome these discrepancies in organizational functioning. He focused on generating systemic actions to gain the trust of the laborers by eliminating barriers in their way in areas such as pay and promotion. He reapplied best practices for soft points in the policies that could be more lenient, and he tried to ensure employees understood where the hard points existed and why.

What he realized is that there were diversity challenges in both the operational (non-exempt employee) and managerial (exempt) ranks due to what he called "*unconscious bias*" where the leadership "*did not see the unlevel playing field that shifted pay and progression systems*". When it came to pay raises, both groups had a general feeling of unfair practices at play. The senior leadership practiced nepotism, with more emphasis placed upon relationships and affinity rather than solely upon results achieved. Performance appraisals were artificially manufactured to advance certain favored categories of employees. Not everyone was held to the same standard of accountability, leading to frustration and unhealthy competition. Career path ambiguity and unclear requirements for open positions added another layer of dissatisfaction in addition to pay. Robert noted, "*Whoever is the lead person in the facility is the great equalizer. Whatever standards and principles they align to are the ones everyone else aligns to*". In order to affect change, Robert leaned on his company-supported training and trusted mentors to help him through the process of determining next steps. One-on-one conversations with the site leader proved to be the best approach to making positive impact. Principle-based decision making was one of the strengths of leaders within his company, and he was coached through options that would allow him to operate within the spirit and letter of the law. Robert gathered data depicting a disparity within the context of race, ethnicity, gender, age and tenure. He took this information to the senior manager as a compelling argument for action. Coupled with what was going on in the external environment or the demographics in the labor pool, Robert convinced leadership to make the shift within internal progression systems. Thanks to Robert's initiative, there were "*glimmers of excellence*" observed in the organization's HR practices.

One such example of a positive shift related to a minority female equipment operator who was placed in disciplinary action due to being tardy almost daily. Robert was given the employee's file with a recommendation for termination. However, prior to acting he investigated the facts and reasoning behind the person's tardiness.

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He noted that other than the sporadic lateness there were no other grievances in her personnel file. It was also known that the culture was more rule based and it was not customary to try to understand the reason behind employee actions or guiding principles. This was no longer an acceptable practice, by Robert's standards. By utilizing path-goal skills acquired, Robert conducted a situational analysis to determine that the reason for her tardiness was insufficient childcare. As a single foster care mom, she had to remain outside of a childcare facility until the provider arrived and then she could go to work, which meant she missed the start of shift. As the only certified caregiver, the employee made the difficult decision to arrive to work late and faced consequences that could have led to her termination. Upon discovering this hardship, Robert jumped into action. The employee was granted flexible shift hours to ensure she could meet her work availability requirement and not endanger her children. He was instrumental in organizing a childcare fair, whereby caregivers who needed non-traditional operating hours could connect with possible providers. Through this effort, the female employee and others were able to receive services that aligned with their work schedule. This was a clear win-win for both the employee and the organization. Even so, Robert pondered if there were other instances in the organization where personnel retention, disciplinary cases or chronic absenteeism were outcomes of individuals failing under the weight of a rigid HR policy. He was determined to find out and take decisive action.

CONCLUSION

Like many managerial personnel, Robert faced an array of conflicting situations throughout his career. He had to choose between serving the management or the employees – at times he obliged the employer's wishes and in other instances Robert catered to the employees. His education shaped his beliefs that HR had to protect the interests of the employees. The psychological connection existing between Robert, his co-workers and subordinates strengthened his ability to navigate the volatile waters of HRM. However, Robert realized that the rhetoric was at times different from reality - evident during instances where management demanded he comply with certain directives, or being disillusioned due to existence of nepotism, inequity in performance appraisals and harsh disciplinary measures. Robert remained steadfast and championed for others from within the system, using the tools of dialogue to convince the management and effectively intervene so that HR truly emerged for the people.

In the end, Robert was pleased with the policy changes he and his team were able to transact. He convinced upper management that the people were their most valuable asset and without them the company could not to ship one unit of product.

Robert understood that HR must maintain compliance with labor laws and safeguard the company from fines and litigation. He also learned that HR is meant to be an advocate for the masses, maintaining knowledge of what options are possible in any situation confronting an employee. Moreover, HR also needs to protect the interest of its people. It is paramount to do so, for preservation and long-term success of any company. People will generally go the extra mile when they know someone cares about them.

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KEY TERMS AND DEFINITIONS

Career: All activities related to one's occupation or professions undertaken by an individual during his/her lifetime.

Change Agent: An individual, inside or outside the organization, who helps the organization in improving itself either structurally, culturally, or strategically to increase its overall effectiveness in terms of quality, production and customer and employee satisfaction.

Empathy: The display of emotional connection between one person and another, with the intent of conveying understanding of what the individual is experiencing or has undergone in the past.

Ethical Dilemmas: Situations where an individual must choose between two options, one which is morally correct and other which might be morally questionable.

High Performing Organization: A team or work unit that reaches maximum results by bringing their diverse skills and talents to bear in a highly effective manner. The focus is on long-term viability by attaining intermediate goals, led by members throughout the levels of the organization.

Human Resources Management (HRM): A managerial function concerned with managing people within organizations. The responsibilities of HRM constitute recruiting, selecting, performance management, compensation, training, and development, complying with labor laws and equal employment opportunities.

Management: Constitutes all activities which plan, coordinate, organize and control the work and activities of employees within an organization to ensure the organization meets its goals and objectives.

Merger: When two companies combine structurally and culturally to form a new organization.

Performance Appraisal: Reviews and measures an employee's overall performance at his/her job at regular intervals usually six months to one year. The employee is given feedback on his/her performance in terms of skills acquired, achievements, growth, and development or on lack of it.

Trade Unions: Also known as labor unions, are collective group of workers in a trade, or trades, or profession who come together to protect their interests, rights and increase their bargaining capability with the management during conflicts such as strikes, lockouts, etc.

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Chapter 2
Strategic Decision Making:
The Innovation and Implementation of a New Sourcing Solution

Anju Kamal
Amrita Vishwa Vidyapeetham, India

EXECUTIVE SUMMARY

Digital technologies are changing the nature of work. Through a case, this study demonstrates the adoption of new forms of work in an organization. The HR department of the information technology firm XYZ often finds it a challenge to place resources with the right technical skill set in their projects within the timeframe specified by the clients. The fact that most skilled workers would retire in the next 10 years posed a different issue. The production of error free monthly reports of resource allocations was another challenge. Drawing from ecology theory, this study expands existing theories of strategic decision making in the context of innovation adoption. The study contends that the innovation of platform sourcing by creating a sustained competitive advantage can solve the challenges. The study adopts the lens of work design to understand the effect of technology on individual outcomes and support the implementation of the innovation.

ORGANIZATION BACKGROUND

The Information Technology firm XYZ was established in 2013 with the aim to provide IT solutions to its clients. The head office of the firm was situated in the IT hub of India, Bangalore in the state of Karnataka and the company intended to be one of the key players in Information Technology solution providers. There were

more than six hundred employees working in five departments, majority being engineers and experienced technical employees. The employees were very energetic and constantly strived for better results to stay ahead of competitors.

Innovation is considered as one of the main drivers of corporate success (Cardozo et al., 1993) and XYZ firm ingrained it in its culture. Qualities such as teamwork, beliefs and ideals of leaders, empowerment, transparency and the flexibility towards new ways of collecting ideas are among the repeatedly occurring factors which characterize an innovation culture (Erickson et al., 2012). The firm XYZ with its intense innovation oriented culture encouraged innovations. The processes of the business could be described as knowledge based with focus on the results. The top management organized monthly meetings with department managers and each department had its weekly management meetings to discuss operations and other related issues. The firm invested more than 6 percent of its annual revenue in learning and development activities. The attrition rate of the firm in 2018 was 10.6% which was the lowest in the Indian IT Industry.

SETTING THE STAGE

The Information Technology (IT) sector in India plays a crucial role in driving growth of the economy in terms of employment, export promotion, revenue generation and standards of living PWC (2011). Many studies assert the changing nature of work, career identities and work-life in the 21st century (Barley, Bechky & Milliken, 2017). The notions of employee engagement, motivation, recognition, nature of careers and the concept of national culture is gradually disappearing as new generations arrive on the scene (Schultz & Schwepker, 2012).

The scenario of absence of a talent bench (Chaturvedi, 2016), less planning around talent and consistent approach to workforce planning (Sablok et al, 2017) is a recurring theme in recent researches. Much of the 2016 Deloitte HR trends (Bersin et al, 2016) reflects these challenges. The report calls for structural changes with a focus on teams along with creation of flexible work arrangements where organizations look for talent from freelancers beyond the boundaries of the firm (Bersin et al. 2016). Hence one of the core objectives of human resources function in the upcoming years would be to establish organizations which are flexible. The means of work to suit flexible organizations would result in job reconfigurations with a mix of short-term and long-term employment contracts (Shelton, 2014). To facilitate the transitions towards flexible work, organizations would utilize the potential reservoirs of capabilities through collaborations. The collaborations with external environment including freelancer workers would ensure a continuous flow of talent through novel and flexible contracts (Willyerd, 2010). Among freelancer

nations India is ranked second after the USA (Elance, 2013). With respect to the trend of freelancing growth, India is seventh among the top ten earning nations, with the USA placed first and the Philippines placed second (Upwork, 2014). In matters of the volume of work completed Indian freelancers top the list, though US freelancers achieve the most on terms of earnings as their charges are considerably higher (Menon, 2015).

The information Technology firm XYZ, in India operated in an environment marked by these changes in workforce and working arrangements. Many studies contend that the external environment would influence the structure of an Organization (Donaldson, 2001). Fiedler (1967) in his contingency theory argues that organizations and environments are constantly changing, and there exists a need to monitor environments and analyze information before making decisions. The contingency theory asserts that for an organization to be effective there should be a fit between the structure of the organization and the environment in which the organization operates.

As certain aspects of the Information Technology firm XYZ became tightly coupled, it became difficult to identify the optimal combination of design choices to achieve desired outcomes. As the firm continued its expansion it faced the challenge of grooming and retaining a diversified talent pool. With rising manpower requirement the XYZ firm started hiring non-technical science graduates, though it posed a challenge to groom and bring them on a common platform.

When the HR team of the XYZ firm analyzed the retirement plan of its engineers by taking the tenure and skill sets they discovered a huge gap. They realized that the current workforce did not possess the right skills and most of the skills they had would retire from work in the next 10 years. The analysis helped them forecast that their business plan could not be executed due to the lack of shortage of right talent. They realized a need to change who they hired and developed. How can XYZ firm reorganize its resources and capabilities in response to market demands? There was no clear cut formula for organizations to formulate a good talent acquisition strategy since a particular strategy could work for few organizations but could fail for others (Chaturvedi, 2016).

A case study research is best suited when a 'how or why' question is being asked about a contemporary set of events over which the investigator has little or no control (Yin, 1984). The case study method is a useful research approach when one intends to explore the context in which something is happening (Yin, 1984) and the method draws its origin from psychology, law, political science and medicine. This study adopts a case method since the author is exploring the factors that contributed towards the strategic decision to adopt an innovation. The firm was chosen based on the understanding of the competitive context of the particular industry and the authors' estimates of the work practices in those contexts. The unit of analysis is

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the Organization called as XYZ. Case study research presents many challenges with emphasis on the individual contribution and choices of the researcher (Yin, 1984; Darke et al, 1998). Evidences are analyzed objectively to eliminate other interpretations and to build a convincing case. The researcher should have the skill to present the facts and establish the reason and effect while arguing persuasively (Benbasat et al., 1987).

In January 2015 the author became involved in a feasibility study for the implementation of an innovation. This study stimulated the academic curiosity of the author and the research began with data rather than theory (Lampel, 2004). As a participant observer the author had unlimited access to relevant information throughout the duration of the study. She continued to work in the Information Technology industry during the study and hence, the decisions made with respect to the case selection and research design flowed from her direct working experience and access to industry professionals. The research process started with the formulation of the research question. A review of the literature suggested a number of variables which might affect an innovation adoption. In this study multiple data sources are utilized and triangulated, which included company reports, business plans, reports by management consultants, magazine and newspaper articles, power point presentations and electronic mails. The author had informal exchanges with coworkers, senior executives and sourcing solution providers during the regular course of business. Hence, data were often gathered in a non-systematic manner though informal personal communications. No formal interviews were conducted for this study. The preference of the author for unobtrusive methods of data collection is reflected in the data collection methods. Field notes were taken, and continuously referred to after the occurrence of the event to ensure accuracy and was stored electronically. Emergent issues were further analyzed and follow up was done through telephone or electronic mail to gain clarity. The prevailing data collection technique is participant observation (Myers, 1999) and this study draws upon the experiences of the author in IT industry. This case study demonstrates the factors that contributed to the adoption an innovation in the context of talent management, the process of adoption and its effect on individual outcomes.

CASE DESCRIPTION

A cool beautiful winter day in November. The time was around 3:00PM. The human resource department of the firm XYZ was planning for the upcoming Diwali celebrations – a big festival in the Indian subcontinent, but they had a lot to do before Diwali.

The HR department of the firm often finds it hard to get the right technical resources for projects as specified by the clients and for acquiring niche skills they often race against time. An integrated talent management approach would help individual performance to be aligned with strategic business initiatives (Newell, 2012).All the reports had to be created in advance, so that the project management head of the company would have the time to analyze and approve them before submitting it to the President of the firm. The five local branches were all situated approximately 200-300 kms from the headquarters and the production of daily error free reports was tough. The human resources department wants the latest data from the local branches on a daily basis, but the branches had problems to create and submit them on time. Often the data was ambiguous, contradictory and obtained very late. Since talent data is crucial for top management to align individual and team goals with company goals and for efficient decision making (Newell, 2012), it was imperative that the company XYZ had to come up with a solution to solve the issue of accurate data collection and reporting. On a long term agenda the HR department also had to deal with the fact that most of the skilled workers would retire in the next 10 years. Sourcing of resources with the right technical skill set for current projects within the client specified timeframe required immediate attention.

The young manager of the project management department, Ashok Jain, who was responsible for managing the projects as per client specifications, was in anguish. He was constantly asking himself the question of how to cope with the situation. He was responsible for submitting various data about the projects to the human resources department, so they could generate the necessary reports. The reports comprised of various data like - the status of the current projects and the projects in pipeline, the technological skill sets required for each project and the level of competency and experience required for each resource. Ashok also had to be aware of the status of all the new projects signed. The majority of projects were handled by teams in the locations other than the headquarters and it took some time to get the documents from the other locations to the office headquarters as the documents were scanned and sent to the central office by email. Often there was a problem with getting the scanned copy itself.

The project management team wanted to analyze the data before submitting it to the President. The human resources department also wanted the latest data on a daily basis from the local branches situated approximately 200-300 kms from the headquarters. Ashok's coworker in the IT department, Mike Peter had obtained some documents about the project details and has started to enter it in the human resource information system, so that the HR department could produce the required reports. But the volume of the data was huge and Mike got irritated and frustrated when he imagined the long working hours until late evening for the next few days that will be required to process all the data. Meanwhile, the manager of the human resource

department, Sakshi Yadav was going through the HR dashboard information. The dashboard was not up to date with data missing. She was a well experienced person who worked with XYZ firm since its inception and always did her level best to meet deadlines and submit reports on time. But many colleagues believed that it is time that she steps down and let someone more innovative and young be the manager of human resources department.The project management head of the firm, Mr. Rahul was too worried about the data. Every month they faced the same problem.

Would the firm manage to submit the reports on time or would they incur a penalty for the delay in processing?

CURRENT CHALLENGES FACING THE ORGANIZATION

The situation was shaky, and Mr.Rahul had no idea how to proceed. On that cool beautiful winter day and when the time was around 3:00PM it was while sipping his hot coffee that he got a sudden idea. Diwali, a major Indian festival was near the corner. Employees were expecting their Diwali gifts and this time it could be something different! He made up his mind to utilize the intense innovation oriented culture of the firm. The firm XYZ believed that management support and organizational resources play a crucial role in adoption of any innovation.

Innovation Adoption

Adoption of innovation take place in firms where the management is enthusiastic about innovative ideas and have adequate organizational resources (Robertson and Wind, 1980). The adoption process can be defined as the process through which the decision makers go through - from knowledge of an innovation, towards formation of an attitude, to an assessment of adoption or rejection, to implementation and sustain the innovation (Rogers 1995). Innovation literature contends that the organizational characteristics like the size (Kennedy, 1983), structure (Zaltman et al., 1973) and innovativeness (Mirvis et al., 1991) influence the decision of adoption (Robertson and Wind, 1980; Damanpour, 1991).While large firms adopt innovations to enhance their performance - smaller firms are more flexible and receptive towards new ideas (Kennedy, 1983). Organizations with formalized and centralized structures are less likely to initiate the adoption decision of innovation (Zaltman et al., 1973). XYZ firm was small in terms of size and had a less formal structure which promoted innovations. Mr.Rahul was popular among his colleagues and subordinates for his work ethics and participative style of management. He decided to call all his employees together and asked them to find solution for the most pressing issue the company is facing - by coming up with an innovative solution. The decline of R& D departments

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have brought in a change in organizations where the process of innovation has taken a collaborative nature which supports the integration of new internal and external sources for innovation (Christensen,1997 & Chesbrough 2003). Mr.Rahul adopted a collaborative approach to innovations and decided to reward the best team with a Diwali vacation trip to an exotic destination. The rapid changes in the information and communication technologies have fostered this collaborative movement by enabling firms to innovate (Dogson et al., 2006). Successful innovation is in essence a positive change that takes place at various levels within an organization (Tidd and Bessant (2011).

Theory of Change

Ecological theory (Campbell, 1965) can be considered as theory of change based on Darwin's (1859/2003) idea of evolution. Ecological theory has been studied widely for the past 30 years on various contexts of change ranging from intra organizational phenomena to large organizational communities (Hannan & Freeman, 1977; Astley, 1985; DiMaggio & Powell, 1983;Aldrich & Ruef, 2006). The primary focus of the theory is on mechanisms that organizations strive to obtain the resources for survival and remain fit through three phases called variation, selection, and retention (Aldrich & Ruef, 2006). Variations are created by random events like changes in the environment or created deliberately by management of the organization through trial and error method (Miner, 1994 & Romanelli, 1999). Mr. Rahul, the project management head of the firm XYZ, in an attempt to solve the issues of talent acquisition and report generation was deliberately creating a variation, when he asked the employees to come up with an innovation. Variations are the source of evolutionary change (Aldrich & Ruef, 2006) and the management of the firm XYZ expected that the change brought through the selected innovation would help them find a solution to the current challenges. Ecology theory contends that the process of selection is through comparison, trial and error method or by following the practices of other successful organizations (Miner, 1994). Selection is the process through which one variation gets selected while the others are rejected. The management of the firm XYZ through the process of strategic decision making decided to compare the various innovations and select one. According to ecology theory retention is the process of making the selected variation a standard accepted part of the organizational practices to make the organization fit for survival (Nelson & Winter, 1982). In the retention phase the selected innovation would be made a part of the organizational practices of the firm XYZ, integrating with the existing process and making the firm fit for survival in its operating environment.

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The Deliberate Phase of Variation Created by Management

The next day all the employees were invited for a meeting. The sole agenda of the meeting was – innovation. During the meeting Mr.Rahul explained the challenges faced by the firm to the employees. Three days were given to the employees to come up with the innovative idea. A week's Diwali vacation to the Maldives was announced as the prize for the winner. Employees were asked to form teams of four members, seal their proposals in an envelope and submit them in the box kept at the secretary's room.

For three days the firm experienced various anxious and collaborative activities. After the third day the top management began to analyze the proposals submitted. Though the box overflowed with ideas, most of them were unrealistic and not feasible. After a thorough review the top management shortlisted three proposals for the final round.

The first shortlisted envelope was from the young manager of the project management department, Ashok Jain's team. The next proposal that got shortlisted was from the young employee in the IT department, Mike Peter's team. The upper management expected something interesting from this young dynamic team. The third envelop that got shortlisted was from the HR manager Sakshi Yadav's team, which was least expected, since everybody assumed the HR manager to be a conservative women.

Ashok Jain's team proposed an effective and but an expensive solution. The company should buy new efficient computer systems for all regional offices and improve the network connectivity between regional offices and headquarters. Systems with high computing power, according to Ashok Jain's team would result in high productivity.

Mike Peter's team proposed a different solution. They suggested that the firm hire two more employees for data entry, so that other resources are not burdened with the data entry job. Such an arrangement according to them would save the time of other employees. It would enable the firm to handle compilation of huge data sets for the required reports within the time. Two dedicated resources for data entry would also reduce the rate of errors and issues of data being lost.

Both these solutions were easy to implement but would they be sustainable in the long run? With much dismay the upper management team went through the proposal of Sakshi Yadav and was in for a surprise. Her team proposed to adopt online platforms for project recruitments and to utilize it for tracking the status of all current projects and projects in pipeline. Platforms, inbuilt with a flexible report-generating functionality were positioned as the new sourcing system to reach the freelance workers scattered around the world at an unimaginable pace and scale. Gupta & Narain (2012), in their study contends that the adoption of sourcing of services

via electronic means in Indian organizations is going to increase in near future, because of the benefits, the pressures of competitive environment and the government regulations, making such adoptions mandatory to bring in more transparency and promote ethical practices. Platform mediated recruitment process figures as one of the top three recruitment trends in the upcoming years (ET Prime, 2019).

Trends in Recruitment

The *State of Talent Acquisition 2019* report by talent assessment firm Mercer-Mettl based on a survey of 990 talent recruiting decision makers across India from various industries assert that Organizations in India would increase recruitment budgets by 34% in 2019 compared to 2018 (ET Prime, 2019).The report states that participant organizations struggle with the gap between hiring volume and budget and to meet their talent metrics they leverage on technology. In their near future priorities, 67% of the participant organizations reported that building a strong talent pipeline of skilled candidates as their top priority, while 63% of the firms wanted to improve the speed and quality of hire and 40% of the organizations wanted to focus on hiring for specialized skill sets. The participant organizations expected an increase in hiring volume form 25% to 31% in 2019 and rated platform mediated recruitment process, employer branding, and technology enabled sourcing as the top three recruitment trends in the upcoming years.

Online Outsourcing

Online outsourcing involve technology enabled sourcing and compensating work, suited for finding workers on demand basis, to do jobs which are easy to modularize and assess - with clearly defined deliverables and skill sets (Boudreau, 2013). The collections of resources and capabilities that enable an organization to flexibly respond to changes in the market can be defined as platforms (Ciborra,1996).Outsourcing platforms can be divided into microwork platforms and online freelancing platforms (Kassi & Lehdonvirta, 2016). Microwork platforms are suited for simple, mechanical and tasks which are repetitive in nature that require less training and coordination. Amazon Mechanical Turk is an example of a microwork platform while Upwork is an example of online freelancing platform. Though any type of work can be sourced on-line, the focus of online freelancing is on specialized and knowledge intensive projects in categories like development of software, design creations, content writing and translations - where the quality of matches, coordination and evaluations constitute the work done (Kassi & Lehdonvirta, 2016). XYZ firm operated in the context of knowledge intensive projects. Table 1 depicts a comparison of microwork and online freelancing platforms based on the dimensions of tasks performed.

Online Freelancing Platforms

Online freelancing platforms as Sakshi's team pointed out are transforming work, organizations and their business models. The focus of earlier studies on online labor platforms was on low skilled microwork (Berg 2016; Chen& Horton 2016). But now the majority of workers hired through online labor platforms perform high skilled knowledge work (Kassi & Lehdonvirta, 2018). Till date empirical research on the use of online labor platforms has focused on workers motivations and experiences offering their services through platforms (D'Cruz & Noroha, 2016; Wood et al., 2018). Few studies have examined the behavior of clients on online labor platforms with a focus on hiring process (Leung 2014; Lin et al., 2018).Studies with respect to the adoption of platform sourcing models within organization's are rare.

SOLUTIONS AND RECOMMENDATIONS

The top management of the firm XYZ weighed the pros and cons of each shortlisted proposal. Among all the three shortlisted proposals which one would be ideal to solve the issue of accurate data collection, getting right candidates on board in the stipulated time and solve the shortage of talent that will arise in future due to retirements? After weighing the pros and cons of each shortlisted proposal, which one would the upper management of XYZ firm select? Whose team would win the Diwali vacation trip to the Malidives?

The Phase of Selection and Strategic Decision Making

The top management of the firm XYZ was looking for an innovation that would act a competitive advantage for the firm XYZ and meet the business goals. To obtain a coherent understanding of the sources of competitive advantage the analysis of a firm's internal strengths and weakness is required (Barney, 1995). Strategic management literature asserts that to create sustained competitive advantage managers must look inside their firm for valuable, rare and costly-to-imitate resources, and then exploit these resources through organizing (Barney, 1980). The management of the firm XYZ hence decided to select an innovation that was valuable, rare, and hard to imitate and then utilize its potential through organizing.

    A firm's resources and capabilities include the physical, financial, human, and organizational assets utilized by the firm to build, produce and distribute products or services to the customers (Barney, 1995). The question of value is concerned with how the resources and capabilities of the firm add value by enabling itself to exploit opportunities. The question of imitability deals with why some of these

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internal attributes of firms may be costly to imitate. The question of rareness is concerned with whether the competitor firms already have these valuable resources and capabilities (Barney, 1980).

The top management found that Ashok Jain's team proposal of buying new efficient computer systems for all regional offices with improved connectivity was effective and might increase the report generation speed, but was high on investment. Mike Peter's team suggestion of hiring two employees for data entry reduces the workload of existing employees. But if the amount of data increases the report generation still remains a challenge. For the questions of value, imitability, rareness and organization Barney (1980), the management found that both these innovation did not yield a favorable response. Ashok Jain's and Mike Peters proposals might help the firm solve immediate problems, but in the long run the firm will face the same challenges. Hence the management concluded that these would not serve the long term business goals of the firm XYZ or create sustained competitive advantage.

The top management next analyzed the innovative idea that Sakshi's team had proposed respect to the question of value.

The Question of Value - Platforms vs. Staffing Agencies

The question of value is concerned with how the resources and capabilities of the firm add value by enabling itself to exploit opportunities. (Barney, 1980)

Since 1940s organizations use staffing agencies to source temporary workforce for short term projects or cover for in-house workers when employees on leave (Smith & Neuwirth, 2008). Agencies offer the organizations flexibility to scale up the workforce temporarily and facilitate efficiency. Many Fortune 500 organizations preserve long term associations with staffing agencies (Koene et al, 2014). But based on the nine case studies of Fortune 500 firms who have adopted platforms for sourcing Corporaal & Lehdonvirta, (2017) contends that the value offered by the platforms when compared to staffing agencies is much higher in terms of cost, flexibility and speed. Firms that participated in the study reported an aggregate 60-70% aggregate savings when compared to conventional sourcing methods and one firm reported that temporary work could be sourced for a third of the price through platforms. According to the firms that participated in the study most of the cost savings with platforms lay in the absence of overhead costs which comprised 25-20% of conventional staffing agencies along with the opportunity to choose a freelancer of required skill set.

The second dimension of value reported by the firms participated in the study was flexibility in terms of the numerical flexibility provided by platforms which allow rapid scale up and down of teams. Firms seek three kinds of flexibility namely the numerical flexibility, functional flexibility and financial flexibility (Atkinson,

1984). Workforce strategies of Organizations usually have a central core of skilled and trained permanent employees who offer the flexibility referred as the functional flexibility and a fringe of flexible contingent workers who offer the flexibilities which are financial and numerical in nature (Atkinson, 1984). Since platforms renders quick access to highly skilled workers, platform sourcing presents a new opportunity for firms to balance their needs for functional flexibility on one hand the numeral and financial flexibility on the other (Kassi & Lehdonvirta, 2018).

The relative ease of contracting and working with freelance workers was the third dimension of value provided by online freelancing platforms according to the participant firms. With an agency they had to fill out extensive requirement documents and do a significant amount of administrative work. Compared to conventional channels for contracting temporary workers, the firms valued how quickly they could process payments through platforms (Corporaal & Lehdonvirta, 2017). The top management of the firm XYZ arrived at the conclusion that platform as sourcing model offer a favorable response for the question of value and moved to the question of rareness.

The Question of Rareness

The question of rareness asks whether the competitor firms have the same valuable resources and capabilities (Barney, 1980). The top management of the firm XYZ decided to explore the question of rareness by examining how the innovation would differentiate firm XYZ from its competitors. Platforms allow firms to access specialized skills and expertise like niche programming languages which otherwise they would not have access and constitute a new opportunity to drive knowledge creation (Corporaal & Lehdonvirta, 2017). By making the boundaries of firms less rigid, contingent workforce strategies can allow flow of knowledge in new ways (Matusik, 1998). Firms can utilize the flow of knowledge across the boundaries to innovate and adapt to environment changes much faster. Online freelancing platforms allow organizations to reach workers with a wide range of skill sets, different cultures and varied work experiences and act as a novel tool for innovation and knowledge generation. (Kassi & Lehdonvirta, 2018). The freelance workers hired through platforms delivered similar or high-quality work compared to other sourcing channels and in some cases, though the cost was similar, the work sourced through platforms demonstrated higher quality(Corporaal & Lehdonvirta, 2017). The top management of XYZ firm concluded that online freelancing platforms could provide the firm a flexible and timely access to a global pool of skilled labor enabling them to get high-quality work done in a cost effective manner. The top management found that access to high skilled freelance workers who are not available in the immediate

environment of the organization and the high quality of work delivered offer a favorable response to the question of rareness.

The Question of Imitability

The question of imitability deals with why some of these internal attributes of firms may be costly to imitate. The socially complex resources and capabilities like reputation, culture, friendship, trust and teamwork are not patentable and difficult to imitate (Barney, 1988).

When platforms are used for sourcing, a network of people and organizations are involved in the process. Implementation of platform sourcing model would bring about a change in the roles of members of the firm and would require novel infrastructure's to align the work practices, contingent upon the scope of adoption of platforms (Kassi & Lehdonvirta, 2018). Firms can also experiment with platform sourcing with some specific areas and later increase the scale and expand the adoption of platform into other areas (Kassi & Lehdonvirta, 2018). Before the process of adoption, the different methods in which managers and employees co-create a climate for experimentation, which accommodate failures and fosters learning, along with adequate training and socio-technical infrastructure and to support the sourcing operations has to be determined (Corporaal & Lehdonvirta, 2017). The top management found that an orientation towards learning where employees are allowed to test, experiment and learn through iterations and failures would present an opportunity for the firm XYZ to foster the socially complex resources and capabilities like culture, friendship, trust and teamwork which are difficult to imitate.

The Question of Organization

The question of organization deals with the numerous components of the firm like reporting structure, management control systems, and compensations which are organized to exploit the full competitive potential of the firm's resources and capabilities (Barney,1988).

Platforms helps clients to source any type of work that can be delivered online and emphasize on the quality of matches, evaluation and work coordination (Kassi & Lehdonvirta, 2018). The organization can post a project on the platform which allows freelancers with the matching skill set to submit a proposal. After evaluations, interviews are conducted online and if found fit the freelancer is hired for the project as per the employment terms and conditions (Noronha& D'Cruz 2017).The platform helps the parties to enter into a contract before the project starts. When compared to the conventional channels for contracting temporary workers where the payments were often delayed or incorrect, the payments through platforms are processed faster

(Corporaal & Lehdonvirta, 2017). Based on the task and skill required, freelance workers rely on their reputations as a metric to acquire future work (Risak & Warter, 2015). Platform parameters would indicate work undertaken in terms of number of jobs, hours and success rate, along with certifications achieved, client feedbacks and overall conduct (Noronha& D'Cruz 2012). Once a job is accomplished, clients rate and remark freelancers, who then provide feedback on the client. The client organizations and freelance workers rely on the displayed information to make their future choices.(D'Cruz & Noroha, 2016, Caraway, 2010).

When compared to the process of hiring a freelancer through an agency, platforms have a faster turnaround time. It could take 6-8 weeks to hire a freelancer through an agency, where as sourcing through platforms took only 2-4 days on average (Corporaal & Lehdonvirta, 2017).Hiring through platforms required a single email to the platform support agent when compared to multiple phone calls, meetings and other formalities required to get a project started with an agency (Kassi & Lehdonvirta, 2018). Around 60% of the time work sourced through platforms was completed and delivered faster (Corporaal & Lehdonvirta, 2017), making the organization aspect of platforms - another dimension which offers value offered by platforms. The management team of XYZ firm hence arrived at the conclusion that the stream lined process of platforms would offer a favorable answer to the question of organization with respect to the sourcing functions of the firm XYZ.

The fact that the unique value offered by platforms in terms of cost, flexibility, speed, expertise, quality and organization can act as sustained competitive advantage for the firm XYZ was confirmed by the management team and Sakshi's team won the vacation trip to the Maldives. The top management after announcing the winner decided to gear up the firm to face the new challenges that the implementation of the selected innovation would bring.

The Phase of Retention and Implementation

According to ecology theory retention is the process of making the selected variation a standard and accepted part of the organizational practice (Nelson & Winter, 1982). Boudreau & Haigu, (2009) asserts that while platforms allow firms to bypass some of the issues in sourcing, the actual success of the platforms depends on the manner in which the firms have invested and organized themselves to align the platform with the existing infrastructure of the firm. Scholars who study innovations argue that firms that adopt innovations are not always successful in implementing the innovations (Klein &Knight, 2005). Processes like division of specific jobs between in-house and freelance workers, finding the freelance worker with required competency, ensuring the quality of the deliverables and supporting the workflows of in-house employees and freelance workers for desired outcomes would take time to re-align with the existing

processes of the firm. (Kassi & Lehdonvirta, 2018). When innovations involve novel technologies, employees would require time to develop their capabilities to use the technology (Repenning, 2002). The management of the firm XYZ estimated that for the technological innovation of platform implementation to be successful, active coordination of the human technology interactions would be necessary. Adoption of an innovation signifies a decision to make use of an innovative idea, but it is during the actual implementation that people gain the necessary skills (Repenning, 2002). The management team further focused on the human technology interactions that the implementation of platform souring operations would bring.

Human Technology Interactions

In the context of human technology interactions, employees classify themselves as having less decision-making powers and autonomy in the work (Grote, Weyer, & Stanton, 2014). Task significance is denoted by the level a job influences the life or job of others outside or within the organization (Morgeson & Humphrey, 2006). Since positive self-worth, purpose, value and efficacy are linked with meaningfulness - automated technologies might decrease the self worth of human beings and impact task significance (Baumeister and Wilson, 1996). Panda and Rath (2018) contends that there is a significant positive relationship between responsive human IT infrastructure, the functions of business, technology management and organizational responding. Though technological adoption would decrease uncertainty at work and use less cognitive resources, employees identify it with less utilization of skills and decreased autonomy, resulting in decreased levels of identity with their profession after the adoption (Eriksson et al., 2009).

A technocentric approach focus on the deterministic role that technology has in driving organizational changes (Dewett & Jones, 2001), while a human centric approach focus on the role of technology in the process of social construction (Zammuto et al., 2007). Orlikowski & Scott (2008) contends that such deterministic views does not reflect the whole picture of organizational life. Technocentric approaches (Rice & Leonardi, 2013) with its focus on the impact of technology in bringing about organizational changes ignore the situational factors and the role of human agency in determining the use of technology (Orlikowski, 2007). Humancentric approaches (Leonardi, 2012) with its focus on the individual interpretations of technological use tend to ignore the role of technology in shaping work process (Orlikowski, 2007). An integrative perspective which provides a coherent framework that goes beyond the technological deterministic approach and include the human agency - acknowledging that it is not all about human agency but also about the impact on the process of work, would help us understand organizational life better Orlikowski & Scott (2008). Consistent with these perspectives this case study adopts

the lens of work design to explore the human technology interactions to understand the effect of technology on individual outcomes in platform sourcing organizations.

Work Design Theory

Work design refers to the content and the classification of responsibilities, tasks and activities of work (Parker, 2014).A well designed work is usually conceptualized and involves motivational task characteristics like job autonomy, stimulating knowledge characteristics like the opportunity to use ones skills and favorable social features like social support as well as reasonable degree of job demands like the workloads (Morgeson & Humphrey, 2006). Since platform sourcing operations will change employee's connections to jobs and coworkers along with the nature of their work, management of the firm XYZ assessed that it will impact the work designs and focusing on work design would explain the effect of technology on individual outcomes. At the level of the employees, high quality work design enables the individual to achieve outcomes like efficient performance, better sense of well being and positive attitude towards work and (Ohly & Fritz, 2009).

Work design theory asserts that technology affects the work effectiveness and well being via the three characteristics called the demands of the job, the autonomy of the job and the relational characteristics of the job. (Morgeson & Humphrey, 2006). The management of the firm XYZ hence decided to explore the work design elements that will be shaped by platform use. Such an approach they contended would help them understand and predict the effects of newly emerged phenomena in the workplace.

Job Demands

Though technology induced demands exist in the workplace, employee response may vary (Tarafdar et al., 2007).Work design theory contends that job demands can be assessed either as hindrances or challenges (Podsakoff, Lepine, & Lepine, 2007). Only demands which are hindrances are unhelpful, while some challenging demands like learning required to do the job and focused attention are constructive and reasonable levels of such demands can result on favorable outcomes for the employee (Ohly & Fritz, 2009). An organization wide inclination towards learning can foster the notion of implementation as a mutual learning process across the firm, when employees are allowed to experiment with the new process and practices (Edmondson et al., 2001). The management of the firm XYZ decided that creating an environment conducive for learning and risk taking would make the employees perceive job demands in platform organizations as challenge and not a hindrance, which would result in favorable outcomes for the employee. When employees are

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provided with a safe environment to test and learn, through iterations and failures, it helps them learn every aspect about the process of platforms sourcing operations (Gawner & Cusumano, 2002).

Job Autonomy

The regular employees of the firm would resist platform sourcing because of the fear that freelance workers might replace them (Kummer et al., 2017).But most of the firms which adopted platforms for sourcing did not use platforms to replace regular employees, but to carry out works that would otherwise be done beyond the regular working hours or to being back the work which was earlier done externally, back to the firm (Corporaal & Lehdonvirta, 2017).The job autonomy of the in-house workers is not reduced when firms adopt platforms for sourcing operations (Kassi & Lehdonvirta, 2018).The management of the firm XYZ decided that a core group of in-house employees are required to create a culture where the freelance workers can be introduced to the firm through different modes of socialization process. Hence instead of a substitute for regular employees they decided that freelance workers should be hired to complement the skill sets of regular employees of the firm.

Relational Aspects

Work design theory asserts that the outcome of job would also depend on the relational characteristics of the job and individuals with strong positive social ties are more likely to receive emotional support from peers (Morgeson & Humphrey, 2006).The firms which adopted platform sourcing found it very effective to build a program management layer in the innovation department surrounding the platform adoption process by appointing an internal consultant to take care of operations on a daily basis (Gawner & Cusumano, 2002). Lack of awareness on the individual benefits derived due to the innovation and uncertainty pertaining to the usage might drive the internal employees to resist the implementation and maintain the current status quo (Kummer et al., 2017). Since relational aspects of work design theory asserts that individuals with strong positive social ties are more likely to receive emotional support from peers (Morgeson & Humphrey, 2006), the management of the firm XYZ decided to have an internal consultant who is trusted well among the colleagues and has knowledge about the platforms to drive discussions about the advantages of platform sourcing operations.

Role of HR in the Implementation

Interests, values and exchanges of strategy-makers shape how HRM policies are formulated (Watson 2004). The case clearly depicts that the top management of the firm XYZ did not simply react contingently upon the availability of an automated sourcing solution - instead they studied the recruitment trends, external environment of the firm and technological advancements and matched these to their own values and interest through the process of strategic decision making. A study conducted by the firms Orange, Oliver Wyman and Mercer (2016), which analyzed interviews of HR heads of international firms and distinguished academics from various disciplines, state that one of the core missions of HR in the next few years would be to establish flexible organizations and forms of employment. Their study further asserts that HR would be obliged to define and create flexible working settings, with permanent and temporary employees including freelancers and that HR would actively participate in innovation activities and test novel practices by using a test and learn approach to understand the root cause of success or failure of such programs and develop appropriate measures to deploy the innovation effectively across the organization. By adopting platforms for sourcing operations the HR department of the XYZ firm would be responsible for creating flexible work settings where specialized skill sets of freelance workers would complement the skill sets of the employees within an organization. HR should focus on building a talent pool of niche skills and to feed these pools with external resources like freelancers to establish an internal and external capability pools for the organization (Orange, Oliver Wyman and Mercer, 2016).Platforms would enable the HR of the firm XYZ to maintain a team of resource bench consisting of highly valued freelance workers who have worked for the firm and whom the firm can rely on in future. Since most of the talented employees of the firm XYZ would retire in the next 10 years, platform souring would also help HR to drive the long term business goals.

CONCLUSION

The idea of adopting an innovation was put forward by Mr.Rahul head of the project management to help the firm XYZ solve the challenge of placing the resources with the right technical skill set in projects within the timeframe specified by the clients. The fact that most skilled workers would retire in the next 10 years posed a different issue. The production of error free monthly reports of anticipated headcounts and resource allocations was yet another issue that the firm wanted to resolve. Though high on investment Ashok Jain's team proposal of buying new efficient computer systems for all regional offices with improved connectivity was effective and might

increase the report generation speed. Mike Peter's team suggestion of hiring two employees for data entry would reduce the error rate and workload of existing employees. But the management of firm XYZ decided to adopt the innovative idea of platform sourcing that Sakshi's team has proposed. How will they convince Ashok Jain and Mike Peter?

Drawing from ecology theory (Hannan & Freeman, 1977; Astley, 1985; DiMaggio & Powell, 1983; Aldrich & Ruef, 2006) this study expands existing theories of strategic decision making (Barney, 1980). in the context of innovation adoption (Robertson and Wind, 1980) in today's digital environment. The study further contends that adopting the lens of work design to understand the effect of technology on individual outcomes would support successful implementation of the innovation. Thus the study adopts an interdisciplinary perspective on how theories rooted primarily in one area may offer important new perspectives to advance our knowledge in distinct streams of research (Mathieu & Chen, 2011).

Table 1. A comparison of Online freelancing and Microwork platforms based on the nature, complexity, time, competency, management and compensation criteria of tasks

	Microwork	**Online Freelancing**
Example	Amazon Mechanical Turk	People per hour
Nature of the task	Projects consists of tasks which are divided into small micro tasks	Comprises of larger projects and tasks
Degree of complexity	Low degree of task complexity	High degree of task complexity
Time for completion	The completion of projects takes usually minutes or seconds	The completion of projects takes days or months
Competency	Less expertise required	High level of specialized skills required
Management	Algorithmic management by automation of platform	Manual coordination which requires humans to interfere
Remuneration	Piece rate basis of payment	Payment is based on set milestones

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KEY TERMS AND DEFINITIONS

Information Processing Process: The process of how organizations use information to manage uncertainty by aligning different meanings to reduce ambiguity.

Innovation: Introduction of something new.

Millennials: The people born between 1982 and 2004.

Online Labor Platforms: Platforms which are used to hire remote independent workers.

Platform Sourcing Organizations: Organizations which source freelance workers through platforms. A platform in such organizations becomes an important third party in the employment relationship.

Platforms: A collection of assets comprising of components, processes, knowledge, people, and networks, utilizing which a stream of derivative products or services can be created.

Sourcing: The process of selecting the employee with the right skill set for carrying out the assigned tasks.

Strategic Decision Making: Decision making involving the organizational leaders at the apex of the organization who have the knowledge, skills, and abilities to drive business strategy considering the internal and external context of the business

Work Design: Work design refers to the content of the work which consists of various activities and accountabilities.

Chapter 3

Setting Sail in High Seas Amidst Troubled Waters:
Transformational Saga of an Indian Defence Shipyard

Jhilmil Das
Indian Institute of Management Kashipur, India

EXECUTIVE SUMMARY

In this era of incessant turbulence and upheavals, organizations are bound to remain resilient and agile in order to sustain in such challenging scenarios. The study narrates the crises faced by a premier Indian shipyard which suffered a major setback due to the massive squall, leading to grounding of one of its major infrastructures. The case depicts the dilemma faced by the shipyard in the wake of the crises and the subsequent disposition of leadership, resilience, and commitment exhibited by its protagonist leader, who remains undeterred in the face of adversity and took it in his stride to answer the call of duty in order to rebuild the shipyard for a better tomorrow. This chapter highlights various tenets of transformational leadership emanating out of the burgeoning crisis based on the contingency theory of leadership. The study aims to uniquely contribute to the field of academics as well as practice through deliberative approach in understanding the nature of crisis and impact of the crisis management on HRM and leadership competencies required to handle crisis situations.

ORGANIZATION BACKGROUND

The genesis of Garden Reach Shipbuilders & Engineers Ltd. (GRSE) dates back to 1884 when it started its journey as a small workshop to repair vessels of River Steam Navigation Company. The Company was taken over by the Government of India in 1960 after which there was no looking back. The first warship of Independent India, INS Ajay was delivered to the Indian Navy in 1961within one year of being taken over by the Ministry of Defence. Over the last 60 years, the shipyard has built more than 100 warships - the highest number of warships built and delivered by any shipyard of the country. From building 5 Ton Boats to 24600 Ton Fleet Tanker, GRSE has proved its mettle as a pioneer warship builder of the nation. -

Presently, GRSE has a total of 07 manufacturing units located across the eastern states of Kolkata and Jharkhand of the Indian sub-continent and happens to be the only defence shipyard of the country having Engineering Division & Marine Diesel Engine Division apart from Shipbuilding as the core division as elucidated under Figure 1.

The company derives a significant majority of its revenue from its shipbuilding division, which has contributed 94.14%, 90.13%, 92.19% and 94.76% to its gross revenue in fiscals 2018, 2017, 2016 and 2015 respectively (refer Figure 2). The shipyard receives the distinction of achieving over 90% indigenous content - a major step towards self-reliance in state-of-the-art warship design and construction. GRSE has been consistently making profits and paying dividend to the Government of India since 1993-94. Recognizing the brilliant performance of the company, the Government of India granted the "Mini Ratna- Category I" status to the shipyard on 05 Sep 2006, which made it the first Defence Shipyard to get this status. The shipyard also boasts of having the unique distinction of being the 'Best Performing Defence Shipyard', for four years in a row from 2010-11 to 2013-14. The first warship for export by the country, CGS Barracuda was also delivered by GRSE to Mauritius in the year 2014.

Blueprint for Growth

GRSE laid out a well drafted blueprint for growth, expansion and diversification to meet the future defence needs of the country. With proven capabilities to design and build state-of-the-art warships and robust order book, the shipyard aims to become a leading shipbuilding yard as well as multidimensional engineering company with high quality, competitive prices and timely delivery as its hallmark. The construction of three(3) stealth frigates under Project 17-A (order worth ~₹200,000 million) bagged by GRSE was slated to begin in the first half of 2018 with the first ship expected to be ready by 2023 followed by remaining ones at one (1) year intervals.

The first modernization project of the shipyard was completed on 06 June 2013 with an aim to build quality ships in reduced time frame with modular construction technology, which created state-of-the-art shipbuilding facilities comprising of a 10,000-tonne dry dock, a 4,500-tonne inclined berth and a large module hall for consolidation of mega-hull blocks. All these three major facilities are co-located and covered by a giant Goliath crane of 250-tonne capacity, to provide modern infrastructure for integrated modular construction. The modernization has created necessary infrastructure for construction of state-of-the-art frigates and destroyers and paved the way for executing the order for super sophisticated frigates under Project P-17A.

GRSE continues its market dominance in the field of the Bailey bridge industry with a Compound Annual Growth Rate (CAGR) of around 15% over the past five (5) years and expected to double in size through the coming five (5) years. The shipyard expects positive outlook as the deck machinery market in India is estimated to surge around ₹3,000 million in 2020 (source: Dataintelo Analysis).

SETTING THE STAGE

Turbulence in Market Scenario

The global economic and industrial scenario has gone through turbulent changes since the onset of Global Liquidity Crisis in the second half of 2008 which seriously impacted the global shipbuilding industry due to consequent reduction in international cargo traffic and cutback on military spending by major western countries dealing with the aftereffects of the crisis. Considering the complexity and multi-role capabilities demanded in warships, design and construction of such complete platforms has turned out to be a very technology intensive and changing process.

Defence shipbuilding in India has emerged as a focus area for public and private sector shipyards alike. While the public sector shipyards like GRSE are among the frontrunners in the defence shipbuilding space, an increasing number of private shipyards are undertaking specific measures to enhance competence and modify their existing shipbuilding repair facilities to suit the needs of the Indian Navy and the Indian Coast Guard. According to industry sources, Indian Navy's estimated capital budget for up to 2027 amounts to ₹4,500,000 million approx. The Defence Budget of Government of India has grown at a CAGR of ~7% between FY2012 and FY2019 (refer Figure 3). The total shipbuilding capacity in India has expanded at a CAGR of 2.8% between 2011 and 2017 with highest y-o-y increase in FY 2014 (up to 8.8%) due to the capacity addition by private sector during the year (refer Figure 4).

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Challenges for the Shipyard

GRSE has experienced decline in operating revenue over the past five (5) Fiscals. The company's revenue from operations has reduced to ₹9,293.22 million in FY 2017 from ₹16,645.86 million in FY 2016. Profit after tax for Fiscals 2017 and 2016 were ₹114.65 million and ₹1,644.45 million respectively as depicted in Figure 5. The dip in net profits was mainly due to delay in delivery of ships. Increase in contractors' cost by almost 40% also affected the financial performance of the company.

The company expected to derive its majority sales from the Ministry of Defence (MoD) contracts for Indian Navy and Indian Coast Guard. Continued economic challenges have led to pressure on the Indian governmental budgets and allocation of spending. Shifts in domestic spending and tax policy, changes in security levels, defence, and intelligence priorities, general economic conditions and developments, and other factors potentially affect a decision to fund, or the amount of funding available to, existing or proposed defence programs.

The Ministry of Defence and Government of India have continued efforts to reform defence related policies such as the Defence Procurement Procedure (DPP) to promote private participation, which altered the competitive landscape for GRSE with respect to securing capital procurement contracts for the Indian Navy and Indian Coast Guard for the manufacture of products under technology transfer licence. In addition, the changes imposed by the MoD led to increase in competition with international entities in view of the relaxed Foreign Direct Investment policy, which posed challenges before GRSE to receive awarded contracts under the new policy.

CYCLICAL NATURE OF BUSINESS

GRSE's business, in terms of both revenue and expenses, is cyclical in nature with a typical order-to-delivery period of anywhere from twenty-three (23) to sixty-six (66) months, which requires maintenance of high level of working capital. The longer projects are typically the more expensive ones, and its recognition of revenue and expenses occurs in large parts during the middle period of the project, when expensive equipment and sophisticated systems are installed in the vessels. The majority of the company's shipbuilding contracts are fixed-price contracts. In case of cost variances from such estimates, it needs to bear the cost overrun in case the actual recorded expenses exceed the estimated cost.

Imposition of Liquidated Damages

GRSE's contracts with its customers contain provisions that subjects it to liquidated damages for delays in completion of project milestones, often specified as a fixed percentage of the contract value, subject to certain customary exceptions such as (i) occurrence and continuance of force majeure events, or (ii) delays due to non-attributable reasons. In addition to monetary penalties, failure to meet project schedules/ milestones or defective work often lead to adverse reputational impact. Further, delays in completion of construction may result in cost overruns, lower or no returns on capital and reduced revenue for the shipyard thus impacting the project's performance. The company, in the financial years 2016 and 2017, has been subjected to and charged with liquidated damages aggregating to ₹255.75 million and ₹765.60 million, respectively in relation to its product offerings in the ship building and repairs division. Further, customers might not rescind their shipbuilding contracts in future in case of delay in delivery beyond the time stipulated in the contract or it may need to renegotiate some of its shipbuilding contracts.

Losses Due to Cost Overruns

In case of defence shipbuilding, for a warship, cost of the equipment and yard material accounts for 75-80% of the total cost of the warship. Additionally, the shipyard outsources certain aspects of its shipbuilding work including fabrication and vessel sub-assemblies from time to time to its subcontractors. GRSE's import material and equipment depends on the requirements of the customers. The failure to deliver, in a timely manner or at all, the products and services or requisite technology or contract execution (including delays or breaches by suppliers), often leads to higher costs or penalties or the calling of performance bonds, which negatively affects its operating and financial performance.

The shipyard has witnessed cost overruns in some of its earlier contracts owing to factors such as: (a) unanticipated increases in labor, raw material, subcontracting and overhead costs; (b) design related issues, rework and modification issues; (c) delivery delays and corrective measures for poor workmanship; (d) delay in finalization of equipment and systems by the customer; and (e) delay in supply of equipment and integration and subsequent test and trial.

END OF NOMINATION ERA

The era of awarding contracts on nomination/cost plus basis is over. Being a public sector entity, a substantial portion of GRSE's business is awarded through nomination

or assignment of contracts, however, with the liberalization of defence sector, GRSE needs to participate in competitive bidding amongst other public and private defence and other shipyards. In competitive bidding, margins are less, hence it is essential to enhance the internal efficiencies of the shipyard. Further, it also means that GRSE has to review its existing areas of operations, especially the material procurement cost as it comprises as much as 75 per cent of the entire project cost.

Fear of Industrial Labor Unrest

The shipyard industry being a labor intensive one, the challenges posed by the trade union associations often poses risk creating labor unrest, disharmonious industrial relations, man days lost due to strikes, etc. GRSE being located and having manufacturing facilities in the eastern fringes of the country, such labor unrest is a regular phenomenon. The shipyard has 10 (ten) registered trade unions for regular workmen and 4(four) for contract workmen under the Trade Unions Act, 1926 in line with the labor law regulations of the Government of India. There had been recurrent incidences of strikes, lock-outs and labor unrest faced by the Company in the last five (5) years, which attributed to loss of production in its various units.

Impact of Regulatory Changes

In April 2017, the Cabinet Committee on Economic Affairs approved disinvestment of Company shares through Initial Public Offering(IPO). The shipyard had raised around INR 336 crores through the listing, which helped in increasing other engineering activities and tap the potential of the proposed inland waterways transportation in the country. In launching the IPO, GRSE aimed to pursue a number of strategies to help maintain and build on its position as a leading naval shipbuilder in India. The IPO – the latest in a series of Indian defence industry share sales has seen divestment of 25% stake with influx of about INR 3.4 billion (USD 47 million) in government exchequer through the listing.

THEORETICAL BACKGROUND

Crisis: The What?

Crises are inevitable, be it natural or man-made. Weick (1998) defines crisis as "an event with a negative consequence affecting an organization and its reputation" (p. 305). James & Wooten (2010) defined crisis as "a rare, significant, and public situation that creates highly undesirable outcomes for the firm and its stakeholders...

and requires immediate corrective action by firm leaders." According to James et al (2011), crisis entails three key elements: ambiguity, high stakes, and perceived urgency. The word 'crisis' has been used interchangeably with a number of other terms, including disaster, business interruption, catastrophe and emergency (Herbane, 2010). Seeger et al (1998) defined crisis as "a specific, unexpected and non-routine event or series of events that create high levels of uncertainty and threaten or are perceived to threaten an organization's high priority goals". Crisis preparation helps organizations anticipate, identify and organize strategies and tactics to prevent or modify the impact of events (Stocker, 1997).

Why Leadership Matters?

Crisis and leadership are inextricably related. Every follower looks up to the leader during a crisis situation (Zhang, Jia, & Gu, 2012). Leading others through a crisis has become a frequent challenge in recent years (Dubrin, 2010). The better prepared a company is the more likely it is to survive a crisis, or even possibly prosper from it (Barton, Newell & Wilson, 2002; Herman & Oliver, 2002). Crises impacts an organization's financial well-being, reputation, and can build or destroy the trust of its internal and external stakeholders depending on the leadership response to a crisis. Whether an organization emerges stronger, or at the very least without long-term sustained damage, is heavily dependent on its leadership behavior and actions throughout the management of the crisis. Fragouli & Ibidapo (2015) indicates that crises require leaders who are able to take advantage of such a crisis to bring about change and grow the organization.

Leadership decision-making, actions and the environment they facilitate during a crisis forms the foundation of leadership response towards crisis (James & Wooten, 2010), Crises are inherently characterized by time pressure, demanding swift leadership decision making (Mumford, Friedrich, Caughron, & Byrne, 2007; Pearson & Clair, 1998). Despite extreme conditions, leaders in these situations are required to grasp and address the crisis while maintaining a sense of normality to make prudent decisions. Followers look to their leaders for actions, solutions to the crisis, and to help them interpret and respond to perceived threats and uncertainties (Madera & Smith, 2009).

Crisis Leadership

According to James (2004), crisis leadership involves trust, concentrated effort to identify the organization's vulnerabilities and the ability to make wise and rapid decisions and take courageous action. James & Wooten (2010) proposed that a leader's ability to make rapid, wise, and ethical decision is essential for an

organization in crisis. Mitroff (2004) considers crisis leadership as the continuous responsibility to influence individuals in order to manage four key factors during all stages of a crisis: (1) crisis types; (2) crisis mechanisms; (3) crisis systems; and (4) crisis stakeholders. The crisis mechanisms include early warning signals detection, damage control systems and business recovery systems. The crisis systems cover the mechanisms by which a crisis unfolds, and the crisis stakeholders involves various parties, institutions, and even societies, that affect and are affected by a major crisis.

Boin et al (2005) formulated five core tasks of crisis leadership, including sense-making, decision making, meaning-making, terminating, and learning. Sense-making involves attempting to understand the crisis as it unravels, understanding and addressing barriers to recognizing the crisis, organizational limitations in responding to the crisis, and evaluation of the psychological dimensions of sense-making, including issues related to stress, performance, and reality testing. Decision making includes putting a crisis leadership team in place, evaluating alternatives and making critical choices, and building teams and implementation plans with crisis coordination. Meaning-making refers to the actions of communicating crisis while maintaining credibility (Nyenshaw et al., 2016). Crisis termination essentially refers to how the crisis ends, which may consist of actions and assessment of accountability at the end of the crisis. Learning refers to actions and reforms that result from analysis and learning from the crisis aimed at strengthening organizations and systems.

Leadership Style for Crisis: Transformational or Charismatic?

Leadership style has a significant impact on the level of success of any effort, particularly events necessitating a quick response (Lester & Krejci, 2007). Lowe and Mumford proposed potential explanations for the effects of crisis on transformation or charismatic leadership (Mumford et al., 2008). The former proposes that under crisis circumstances, normative routines are undermined which provides leaders with discretion to exercise exceptional influence, while the latter explains that the behavior of the complex social system becomes unpredictable in situations of crisis when followers fail to understand the causes and consequences of the changing events and seek for a leader who is engaged in sense making activities, who is able to exercise exceptional influence by clarifying goals and defining pathways to goal attainment.

According to Northouse (2004), charismatic leadership becomes possible in cases where followers feel more confused and helpless. In turbulent times, followers are more likely to develop unhealthy dependence and over reliance on the charismatic leader (Reave, 2005). Blind obedience to the leader does not allow individual action and development; hence motivation and freedom may be suppressed (Kaiser & Hogan, 2007). Charismatic leadership discounts some of the key functions of leadership

like planning and decision over vision, inspiration, empowerment, setting of high expectations and the fostering of collective identity (Northouse, 2004). Charisma is inherently unstable over time, and institutional patterns need to emerge in order to secure its survival in the long run (Weber, 1947). Further, followers' charismatic attributions to crisis responsive leaders are likely to be short-lived unless the leader is able to relate the management of crisis to a new meaningful culture with which followers remain identified (Hunt et al., 1999). When leaders neglect vision, after responding to crises, then there is a likelihood that followers will cease to view them as charismatic.

Transformational leaders have the ability to motivate others, inspiring their followers to admire, respect, trust, and be loyal to them (Yukl, 2010). Transformational leadership is "a set of interrelated behaviors including idealized influence, inspirational motivation, intellectual stimulation, and individual consideration" (Dust et al., 2014). Conger & Kanungo (1998) suggests that transformational leaders can demonstrate dedication while building good will and follower trust through self-sacrificial behaviors. A compelling vision serves as a meaningful, forward-looking goal to followers, acting as a roadmap for the future direction of the organization (Bass & Bass, 2009). Transformational leaders solicit feedback and new ideas and do not publicly criticize the mistakes of individual members (Bass & Riggio, 2006). Transformational leaders serve as mentors and coaches to followers and encourage two-way communication (Bass & Bass, 2009). As organizational leaders' model transformational behaviors, subordinates emulate these behaviors in their work and with their direct reports (Bass et al., 1987).

Leadership Theories Related to Crisis

Contingency theories developed during the 1960s are a class of behavior-based theories, which propounds that there is no one best way for effectiveness of leaders in all situations (Deckard, 2011). Effective leadership is based on three contingencies, including characteristics of the leader, characteristics of the followers, and the situation at hand. The most effective approach is contingent on factors viz. leader characteristics (e.g., skills, traits, and behaviors), follower characteristics (e.g., skills, traits, behaviors, maturity, and the relationship enjoyed by the followers with the leader) and characteristics of the situation at hand (e.g., goal clarity, urgency, and the nature of work to be done).

According to Fiedler (1971), the relationship between leadership approach and the degree of situational favorableness is determined by three dimensions: (a) Leader–member relations- low if leader is new, not readily accepted or respected by followers, and high if accepted and respected; (b) Degree of task structure - low if task is ambiguous or vague and high if task is well structured and activities/routines are

predictable; (c) Leader's positional power—low if less power is formally attributed to the leader and high if the leader has significant positional power that is formally attributed. Situations are considered highly favorable if all three dimensions are high and not favorable when all three are low.

Stakeholder theory demonstrates relationships between an organization and people in its internal and external environment. The core idea behind this theory is that organizations which are able to recognize, commit to and effectively manage their stakeholder relationships are more likely to sustain in long term (Nyenshaw et al., 2016). Ulmer (1995) posited the need for investing in stakeholder relationships pre-crisis considering the significant influence they can exert upon an organization, because stakeholders have a vested interest in the success of the organization and may represent a network of support during crisis. For example, stakeholders may extend advocacy during crisis by providing political support and crisis-mitigating resources.

Leadership and Crisis Management Stages

The crisis management has five phases in a typical business crisis: (a) signal identification, (b) preparation and deterrence, (c) damage control, (d) recovery, and (e) learning (Coombs, 1999; Mitroff et al.,1993; Ruona et al., 2003). The first stage requires leaders to sense early warning signals that declare the change of a crisis. In the second stage, the leaders are expected to avoid crises and start preparations to face the crisis, in case the crisis has already taken place. The third phase entails controlling the damage by keeping the crisis from spreading in other parts of an organization or its surroundings. Throughout the recovery stage, the leaders are responsible for executing short and long-term plans aimed to assist resumption of business operations. Lastly, in the fifth stage of crisis management, the leadership supports learning and analyzes the critical lessons from the crisis.

Leadership Competencies in Managing Crisis

Kapucu et al (2018) has propounded leadership behavioral competencies based upon three behavioral types: (a) Task-oriented behavior; (b) People-oriented behavior and (c) Organization-oriented behavior. Powerful and decisive leadership is a particularly important requisite when crisis situations occur (Yukl, 2002). The vision of an organization's future can be realized and be meaningful if they are transferred to employees and other stakeholders (Barrett, 2006). According to Yukl (2002), problem-solving describes work-related problems, analyzes problems in a timely and logical manner, recognizes reasons for problems and finds permanent and coherent solutions, performs decisively to accomplish solutions, and solves

significant problems or crisis. To transform these inputs to innovative behaviors and innovative products, it requires a culture and environment that supports innovation (Woodman, Sawyer, & Griffin, 1993). The second group of behavioral competency consists of people-oriented behaviors, which are team building, planning and organizing personnel, and motivating followers in crisis leadership. The last group of leadership behaviors is organization-oriented behaviors, which includes networking and partnering, decision-making, scanning the environment, and strategic planning.

LEADERSHIP EFFECTIVENESS IN CRISIS

The effectiveness of transformational leadership has shown to relate to enhanced effectiveness of employees, usually in the form of followers' performance (Jung & Avolio, 2000), individual effectiveness (Denison, Hooijberg, & Quinn, 1995), task performance (Wang et al., 2005), and organizational citizenship behavior (Jung, Chow, & Wu, 2003; Spreitzer, Perttula & Xin, 2005; Wang et al., 2005; Kirkman et al., 2009).

Role of Leadership and HRM in the Context of Crisis Management

The field of Human Resource Management (HRM) serves as a central player in helping organizations develop the intellectual and social capital needed to effectively manage potential or actual crisis events (Wang et al., 2009). Researchers have strongly argued on the linkage between Human Resource Development (HRD) in facilitating the organizational crisis (MacKenzie et al., 2014). HRD activities in crisis management leads to develop organizational goals, values and capabilities that enhances competitive advantage of firms (Garavan, 2007). Strategic HRD contributes to organizational crisis by providing organization with operational capabilities to manage crisis and enable organizations to learn from crisis to prevent and improve responses to future crisis (Doppelt, 2017). HRD activities have a strong linkage in their abilities to enhance the organization's human capital and contribute to business strategies (Rimanoczy et al., 2010). Successful implementation of crisis management requires high level of strategic integration between HRD, leadership, organizational structure, culture and strategy. Moreover, to confirm successful implementation across the organization, stakeholder support is essential and can be achieved by aligning learning, change and performance interventions with organizational strategy (Wang et al., 2009).

Empirical studies have confirmed that training and development does have a significant positive influence in enhancing crisis events (Gaba et al., 2001; Reznek et

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al., 2003; Weller et al., 2003). Further, training and development plays a significant positive influence in enhancing crisis events (Gaba et al., 2001; Reznek et al., 2003; Weller et al., 2003). Organizational culture can be considered as one of the major predictors of crisis events because it represents shared beliefs on issues such as risk and organizations' vulnerability to crisis situations (Bowers et al., 2017). Moreover, HRD can facilitate change and enhance crisis preparation through organizational culture and promotion of organizational learning (Trehan & Rigg, 2015). Learning plays an important part in every crisis phase and also helps enhance organizational operational readiness (Wang et al., 2009). According to Wooten & James (2008), communication is important because it shapes the stakeholder's perception of the crisis and the organization.

According to Sommer et al (2016), leaders play a key role in this process as they focus attention on the repair and transformation of the organization. It is crucial for organizational leaders to adopt competencies which include and not limit effective communication when leading an organization through success recovery in all phases of the crisis phases (Johansson & Back, 2017). HRD professionals play a crucial role in educating the leaders and members on the change management process and seek the appropriate development interventions to cope with the crisis (Abdullah, 2009).

CASE DESCRIPTION

After the successful completion of tenure of his predecessor RAdm AK Verma, the baton was passed onto RAdm Vipin Kumar Saxena, IN (Retd), appointed as the Chairman & Managing Director of GRSE on March 1, 2017. Prior to joining the company, RAdm Saxena had served over thirty-one (31) years of commissioned service in the Indian Navy at apex level after completing Bachelor of Engineering (Electrical) from Jabalpur University. He also held a Masters in Defence Studies from Madras University. As Principle Director (Ship Production) at Naval Headquarters, New Delhi, he had handled various aspects of shipbuilding while managing multiple major contracts for construction of a number of warships at the Indian and foreign shipyards.

RAdm Saxena joined GRSE at a time when the shipyard was experiencing major challenges, both internal and external including economic, financial, organizational as well as workforce related issues. He had two choices in front of him – to remain contended with status quo or to create a new formula for success. However, in Saxena's mind, the only choice was to transform GRSE and reposition it as a world class shipbuilding organization.

Change Initiatives Under New Leadership

GRSE Chairman & Managing Director RAdm Saxena, with his prior experience of handling challenging situations, was quick to realize that in spite of the burgeoning pressure being surmounted upon the shipyard, there were ways to reposition it again in its past glory. Acknowledging the situation, he decided to establish performance metrics in terms of productivity, cost competitiveness, quality and timely delivery and conducted a SWOT analysis to identify opportunities available to the Company. The strengths of infrastructure and production facilities were leveraged to develop reliable vendors who could support shipbuilding, in order to address the emerging opportunities and reduce the impact of prevailing threats. Initiatives were taken to upgrade processes and products in line with latest technology. The company strived to put up new profit centers through diversification, product addition, adoption of latest processes and methods, envisaging modern shipbuilding requirements and self-reliance.

Future Outlook

With a futuristic vision, Saxena decided to focus on the six key strategies in order to exploit the competitive strengths of the company and expansion of business: a) Expand operations through partnerships and collaborations; b) Diversify through expansion in new growth areas; c) Develop in-house capabilities to design and develop specialized products; d) Leverage advantage of life-time support; e) Develop human capital; f) Enhance customer satisfaction and g) Optimize operations towards becoming a lead shipbuilder of the nation.

For GRSE to compete in the global arena, quality and cost of construction and build period of ships were considered to be key drivers. The new Defence Procurement Procedure (DPP) promulgated by the Ministry of Defence and 'Make in India' initiative of the Government of India envisioned more private participation in the defence shipbuilding, which would have a direct bearing on the market environment and performance imperatives thereby impacting GRSE's order book position and bottom line. RAdm Saxena realized the need to step up performance in all areas of operations. The modernized infrastructure created with the capacity to build 14 ships concurrently aimed to enable the shipyard to improve quality and reduce build period, thereby meeting the stiff timelines achieved by leading global players in shipbuilding industry.

Eye on Foreign Waters

Saxena set his eye to tap South-East Asian, West Asian and Latin American markets for exports through both competitive bidding route as well as on a nomination basis and won overseas bids. He emphasized building strategies like strengthening relationships with its primary customer, the Indian Navy; enhancing its capacity to pursue naval ship repair and retrofitting contracts, and upgrading its shipbuilding facilities to enable the accelerated construction of more advanced vessels by lowering material cost to boost margins. Considering the margin in ship repair-cum-retrofit segment of around 25-27%, the company looked at cost savings in material procurements as materials constitute about 80% of a shipbuilder's cost. In terms of internationals sales, GRSE aimed to pursue opportunities to export small and medium-sized warships and patrol vessels to Africa, Latin America, South East Asia and West Asia.

The shipyard enhanced its innovative capabilities by investing a higher amount of capital as a percentage of its revenue in research and development activities, with greater efforts in securing exports. As on July 2018, the company had an order book of INR 203 billion, comprising 13 naval vessels. In fiscal year 2017-18, GRSE's revenues and post-tax profits increased to ₹ 13.46 billion and ₹ 868 million respectively. With greater thrust in enhanced productivity, improved quality control and human resources under the tenure of the new leadership, GRSE was determined to overcome the situation in coming years. GSRE's corporate vision is "*To become a global leader in warship construction. Infrastructure agility is one of our key advantage*", proclaims Saxena. Towards this, the shipyard started participating in global tenders to build a healthy order book position and increase its export of defence platforms and products. In addition, the shipyard also boosted diversified businesses with neighboring countries like Bhutan, Myanmar, Nepal etc.

Adoption of Structural Changes

As soon as RAdm Saxena took over the reins of GRSE in Mar 2017, he launched an organization-wide rejuvenation program focusing on restructuring and reorientation of the mindset of employees and with a view to infuse life and dynamism among all employees. However, the response was slow as expected in bureaucratic set-up and there was covert resistance and fear among employees in the organization. Saxena took drastic and multi-pronged measures to bring about structural and cultural changes. The board was overhauled, portfolios of directors were changed, and heads of business verticals were given additional flexibility to operate with more accountability and less rigidity. The restructuring was done with rationality which resulted in reducing the levels of decision making (refer Figure 7). The business heads were given the single point of responsibility and empowerment to run their

verticals independently with enhanced financial powers. The concept was designed to reorient their mindset to take on additional responsibilities and to bring in healthy competition among the peers to scale up the ladder for future positions.

Focus on Collaboration

With the active support and cooperation from sub-contractors in various shipbuilding activities, Saxena built upon the capabilities of the shipyard manifold enabling quality production of warships and auxiliary ships in a shorter time frame. He appreciated the efforts and achievements of the highly skilled and dedicated workmen, supervisors and officers of the shipyard and vowed to raise the bar of excellence to take GRSE to much greater height in the near future. He emphasized the fact that in order to compete in a highly competitive market, it is imperative to lessen the production cost and deliver quality service within timelines. Apart from offering innovative solutions and cutting-edge technology, it was also important to address the issue of process improvements in the existing processes. Cross-functional teams were created and organizational processes were revisited to support the business vision and strategies.

Cultural SHIFT

In order to bring significant changes in organizational culture, RAdm Saxena relied on focused measures to improve internal communications and emphasis was made on transparency and accountability to improve corporate credibility. Delays and defaults were reduced through ongoing rationalization and benchmarking of systems and procedures. The large-scale initiative of leadership and critical behavioral training and human resource development at middle and junior levels, succession planning, focused intervention, restructuring of Key Result Areas (KRAs) led to change in the mindset of people towards bureaucratic functioning. Saxena spearheaded in setting up a robust Performance Management System (PMS) in order to build a strong culture of performance improvement and accountability and not just operational decisions. The renewed PMS distinguished high performers from non-performers and provided opportunities for fast-tracking performers towards enhanced growth and opportunities within the organization.

A number of initiatives for culture change, coupled with strategic initiatives of acquiring global business, diversification and a number of Corporate Social Responsibility (CSR) initiatives in broad thematic domains such as Skill Development, Swachh Bharat Initiatives, mainstreaming differently-abled persons and health related initiatives for improving the quality of life of the marginalized segment of the society developed a sense of organizational pride among the employees. The

cumulative benefit of the processes adopted by Saxena was reflected in GRSE's augmented productivity and profitability.

Policy Rejuvenation

RAdm Saxena's biggest contribution to GRSE had been his continuous effort towards rejuvenating ongoing, incremental changes in policies and procedures at the micro level. Before his tenure, the company's decision-making processes were bureaucratic as the management found it difficult to make decisions in the midst of complex regulations which led to perpetual delays and extended timelines in project completion leading to Liquidated Damages. Saxena ensured regulatory and statutory compliance for efficient corporate governance, effective internal control, well defined organization structures, pre-identified authority level and procedure along with a comprehensive delegation of power for smooth decision to align it with changing business environment and for speedier decision making. A series of changes were made at the basic process and management level, delegation of financial and managerial powers down the management hierarchy, empowerment of frontline executives, new HR policies to promote talent and usage of information technology to build knowledge centers.

Capability Building

As part of People Capability Building initiatives, Saxena initiated various leadership and capability development programs. He started the concept of Suggestion Box and Innovative Best Practices with a motto of promoting the culture of innovation and idea generation which received almost 2,500 responses in the first quarter of its launch. Workers were encouraged to share new ideas or any issues they faced in their work environment, and they were called idea champions and incentives were given for implementation of such ideas. With a view to nurture a culture of recognition and to promote meritocracy amongst employees, various award schemes were introduced which increased the level of motivation among employees. A study on Employee Satisfaction Survey was conducted and an action plan was developed based on the inputs of employees. Saxena also promised to uphold the highest standards of transparent and ethical governance practices while creating value for all stakeholders which facilitated in faster decision making and enhanced level of motivation.

Repositioning the Brand

Under the able leadership of Saxena, GRSE acclaimed to be the only shipyard in the country to have delivered 5 warships to the Indian Navy in 11 months (Jun 17 – Apr 18) as illustrated in Figure 6, which helped it to gain predominant prominence in the defence shipbuilding segment, followed by huge reputation from the Ministry for its delivered projects. The shipyard also received Raksha Mantri Award for Best In-house Design Effort for its first export warship and various accolades including ICC PSE Excellence Award 2016 and ET Bengal Corporate Awards 2018. Amidst looming crisis and burgeoning challenges, the shipyard delivered its historic 100th warship to Indian Navy during the FY 2018-19 and became the only shipyard in the country to achieve such a feat. The total order book position of the Company for the three (3) divisions viz. Ship Division, Engineering Division and Engine Division, as on 31 Mar 2019 increased to ₹ 21,644.25 crore.

The company also made an inspirational benchmark for other organizations by implementing the *"Make in India and Indigenisation"* initiative of the Government of India with maximum indigenisation content through Licensed production with collaboration and Transfer of Technology (ToT), Co-production, Assembling, Design and Manufacture in India with ToT and also through in-house capabilities developed to design & build most modern warships in the country. Despite competition from International and Indian Shipyards in Public and Private sector, GRSE continued to make efforts to secure shipbuilding orders at domestic and international level and successfully awarded two (2) warship building projects at a value of ₹8,746 crore under competitive bidding.

CHALLENGES/ PROBLEM

On April 17, 2018, at about 8 pm, a cyclone hit Kolkata resulting in the collapse of a 250-tonne Goliath crane at one of GRSE's units, which was instrumental in assisting the shipyard in construction of a wide range of modern and strategic warships by supporting the newly constructed hull shop, module shop for mega block integration, dry dock and building berth for the construction and repair of ships. The collapse resulted in damage to two workshops – a module hall and a store complex. Some minor damage also occurred in the dry dock and inclined berth. The collapsed crane went "beyond repair" and had to be written-off. The ships under construction at the new dry dock and inclined berth (two facilities where the ships are being built) somehow survived the aftermath.

The Aftermath

As an effect of the collapse, the construction methodology of the ongoing P17A project had to be modified to minimize the requirement of high capacity crane and smaller cranes of 25 tonne capacity were installed to carry out the day to day construction activities. Facing a strict deadline for the frigates - the most sophisticated vessels of their class ever to be designed in India, the shipyard had to overhaul the entire chalked out plan and initiate the process of replacing the crane. Just clearing debris from the site of the accident would take three months. Surveyors were required to complete their assessment before insurance claims would be honored and only after which the process of commissioning another Goliath crane could begin. As a new Goliath crane would take at least 30 months from issue to tender to installation and commissioning, its collapse would impact not only the ongoing programs but also contracts under negotiation. The book value of Goliath Crane as on April 1, 2018 was ₹880.21 million and the estimate of financial effect of the incident could not be ascertained immediately.

The news of collapse of the Goliath crane came at a juncture when there was barely any day left before the shipyard's Raising Day celebrations on 19 April 2018 considering every minute preparations and invitation details already rolled out for welcoming high-level dignitaries. Further, the IPO being slated in the subsequent month, such incidence led to dwindling sentiments among the minds of the potential investors and turned out to be really detrimental. The overall mood of the shipyard turned extremely somber in the aftermath of the incident which spurred a sense of uncertainty and insecurity not only among the employees but also the stakeholders who had reposed their faith on the organization. There was also this looming uncertainty regarding the ongoing projects lined up and prospects regarding future orders which was prevalent in addition to financial, property and potential reputation loss.

KEY CHALLENGES

The month of April was meant to be a harbinger of change for the shipyard with lots of promises and tasks ahead in the new financial year. RAdm V.K. Saxena seemed determined not to get bowed down by any sort of deterrent and quick to find answers to the questions currently hovering on his mind: What are the possible mitigation measures to overcome this current scenario in a minimum timeframe? What would be the possible outlook of the Ministry as well as its major clients like Indian Navy and Coast Guard who had reposed their faith on GRSE? Whether GRSE would be able to maintain its credibility while bagging future projects amidst tough competition in the market? How could the shipyard manage to convince its potential

investors and continue to bring back their trust and confidence for the forthcoming IPO? Saxena seemingly unfazed by this sudden shock realized the need for a long journey of transformation lying ahead for the shipyard.

Response to the Call

The shipyard had scarcely imagined to have faced such crisis ever since its operation till date. CMD Saxena, initially taken off-guard to learn about the magnitude of the impact, prayed to the Almighty heaving a sigh of relief to learn about zero casualty from the potential catastrophe. The most important factor during the emergency phase is to mitigate the threat and reduce disequilibrium to a level where the organization and people within are at a safe level (Heifetz & Linsky, 2002; Stern, 1999). First impressions of the crisis are usually accompanied with limited factual information that often misses the underlying causes; therefore, it is advantageous to focus on the core purpose when formulating the initial response (Mitroff, 2004). To begin with, Saxena visited the spot of the accident and tried to analyze the situation on ground himself. The leader must understand the importance of people seeing him face the challenges head on, walking the walk and talking the talk as it were (Witt, 2002). The leader must weigh the quick decisions against the realization that stress reduces cognitive abilities (Goethals, 2004). Saxena, with his usual decisive self was quick to respond to the situation and gather inputs before deciding on the future plan of action.

Rising to the Occasion

The adaptive phase begins when the organization returns to a sense of stability. The leader must take advantage of the fleeting organization mandate to address the underlying cause of the crisis so as to prevent repetition of such event in future, even though the immediate crisis and danger remains under control (Heifetz & Linsky, 2002). RAdm Saxena called for an urgent meeting with the heads of various verticals to discuss on the crisis mitigation program and vowed that GRSE would deliver the first 6,670 tonne warship ahead of its scheduled delivery in 2023. He asserted, "*I am making a clear statement and there is nothing under wraps,*" calling the accident "*a temporary setback*". Saxena called upon his key team members to chalk out action plan with a view to ensure adherence to delivery schedule without any loss of productivity and slippage. An internal enquiry was ordered to establish the cause of accident and fix accountabilities. A core group comprising of senior leadership was prepared to assess the situation on ground and assess the damage severity caused by the storm. Saxena decided to take daily stock of progress of the situation from his core team and prepared a SWOT analysis for rejig of the prevailing crisis. Small

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group decision making can provide a backstop to help curb a leader's impulses, encourage reflection and critical dialogue, and point out problematic assumptions and unrecognized implications of a potential course of action (Stern, 1999). Saxena called for preparation of action plan based on risk analysis and sensor monitoring by external consultant. The contingency on factors such as the relationship between Saxena's leadership approach and factors such as the leadership position, leader-member relationship and clarity of goal emerged as the primary reason for getting team support towards advocating for the cause.

Deliver It Right

RAdm Saxena realized that communication not only with the employees but also with other stakeholders was essential. He shared the vision of the resurgent GRSE envisaged by him with all stakeholders through meetings and workshops with a view to bring back the optimism and enthusiasm. The leader must define what the future should look like, align structures and processes, and inspire people to make it happen despite obstacles (Mitroff, 2004). RAdm Saxena along with his coalition team of members across levels, decided to address the internal and external stakeholders including employees, vendors, contractors and clients and clear their doubts and apprehensions. Inputs were collected from various stakeholders to overcome the shortcomings and prevent future occurrences. An organization's communications seem open and truthful and the leader is seen as genuine, compassionate, and confident in the future if he goes a long way towards successfully managing the crisis (Witt, 2002).

Saxena relied upon collective approach in decision making and ensured that the welfare of the employees was not compromised under any circumstance. He felt the need to improve the morale of the employees and include them as a part of the change process. During the crisis, a successful leader can provide stability and security as well as reduce anxiety by consistently returning to the organization's values and vision (Klann, 2003). Personal notes were forwarded to the invited dignitaries scheduled to attend the Raising Day of the company. Saxena realized that there were reports of fear and psychological effects among employees like anxiety and depression, which could have a detrimental impact on productivity and needs to be addressed immediately. Saxena made regular visits to check progress of the ongoing projects and motivated the team to avoid psychological distress. Physically being at the scene also gives the leader the opportunity to embrace his central leadership role, capture the initiative, seize power and take control (Bazerman & Watkins, 2004).

Saxena planned to share relevant information with the media to avoid any miscommunication which might lead to negative sentiment among the stakeholders keeping in mind the forthcoming IPO and also to boost up the image of the company

among the potential investors. While addressing the media, RAdm emphasized the continued efforts of the shipyard to stay positioned in order to bring back the confidence of the clients handled by the shipyard. "*It will be our endeavor to lead by example as a Shipbuilder of Tomorrow by pursuing growth strategies that will be responsibly competitive, sustainable and inclusive*", proclaimed Saxena. Rapid, honest, and transparent communication can prove to be the lifeblood of successful crisis management (Witt, 2002).

Learning From Setbacks

Less than a month after the shipyard suffered a major setback posed by the wreckage caused by the near-cyclonic condition leading to collapse of its 250-tonne Goliath crane, CMD RAdm Saxena had vowed to complete the construction of three state-of-the-art frigates for the Navy ahead of schedule. Saxena ensured that the team was quick to respond to the crisis situation and conducted an 'assessment study" to map the extent of damage and ascertain the reason for the mishap as well as determine the cost and time implication towards capability restoration of the assets. "*There will be no effect in terms of construction of 3 Project 17A frigates for the Navy*", promised RAdm Saxena. When a leader genuinely conveys a feeling of empathy to the victims, it bolsters the confidence, will, and character which they need to recover (Witt, 2002). Saxena ensured that the alternatives were worked out on the affected assets and infrastructure on war footing to resume shipbuilding activities to avoid delivery slippage and restore the faith of the clients towards the shipyard. Despite the stressful environment, the leader must have the emotional capacity to endure the uncertainty, frustration, and pain that is ever present in a crisis (Heifetz & Linsky, 2002). CMD Saxena consistently emphasized upon his leaders to bring back the focus by strengthening partnerships and reinforcing the relationship with the clients. He also insisted on promoting innovative capabilities of the organization to address the adversity and sail through tried times towards successful transformation.

CONCLUSION

The case narrates the sudden crises faced by Garden Reach Shipbuilders & Engineers Ltd (GRSE), the premier Kolkata based Defence Public Sector Undertaking (PSU) while on its transformative journey. The study revolves around the dilemma faced by the protagonist, Rear Admiral (IN) Retd Chairman & Managing Director V.K. Saxena when the sudden crises hit the shipyard, which was already undergoing changes to meet external as well as internal challenges.

With the end of nomination era and shift towards competitive bidding, the shipyard was going through tough competition posed by public and private shipyards. Getting onto the arduous task of transformation for the shipyard, RAdm Saxena felt the need to enhance the capability of the shipyard by focusing on infrastructure expansion, modernization, exports and human resources. However, the collapse of the Goliath crane in the wake of the financial year FY 2018-19 threw up challenges before the shipyard to put the ongoing programs of the shipyard at risk and affected its ability to undertake new initiatives.

Undeterred by the sudden crises faced by the shipyard, RAdm Saxena took it in his stride to revive the situation and set the sail of the shipyard back on track amidst volatility and turbulence plaguing the organization. For the shipyard which was slated for IPO in just a few months, such setback seemed pricey for its ongoing projects like P17A and with regards to its plans of foraying into foreign waters. The shipyard with its diversified business verticals, however, was determined to stay afloat amidst overpowering business dilemma attributed by internal and external risk factors and overcome the crises caused due to the collapse of its assets. RAdm Saxena with his vision of transforming the shipyard out of this sudden crisis charts out an action plan with his team and steering the shipyard into action.

Organizational crises could be the worst disaster any company can experience or it could be its finest hour, however the difference lies in the effectiveness of the leader to provide guidance, inspiration, and motivation to his team to overcome the crisis. The transformational leadership acts as a moderating effect in crisis situation because of the behavioral components of the leader, which positively influences its followers to achieve successful transformation.

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KEY TERMS AND DEFINITIONS

Change: To make or become different.

Change Leadership: The ability to influence and inspire action in others, and respond with vision and agility.

Change Management: The management of change and development within a business or similar organization.

Crisis: A time of intense difficulty or danger.

Crisis Leadership: Empathy for the people affected in crisis.

Crisis Management: The process by which a business or other organization deals with a sudden emergency situation.

Leadership: The action of leading a group of people or an organization.

Transformation: A marked change in the form, nature, state, or situation.

Transformational Leadership: A leadership style in which leaders encourage, inspire, and motivate employees to innovate and create change.

Chapter 4
Offense or Defense:
Recruiting and Retention Challenges at ZGS

Tahani Abdallah AbdelJawad
Birzeit University, Palestine

EXECUTIVE SUMMARY

Using a niche service provider, Zforce Government Solutions (ZGS), this case provides the reader with a first-hand examination of the organizational issues resulting from ineffective recruiting, retention, and succession planning, allowing for the acknowledgment of the coherent, interdependent, and interrelated relationship between the aforementioned topics. This case study performs a revelatory assessment of ZGS's application of Harvard's Soft HRM model and fundamentals of key issues reflecting organizational mismanagement of human talent, where human talent is vital to organizational continuity. Written from the vantage point of a previous ZGS senior management employee, this case study utilizes a qualitative research approach, with empirical data gathered from four in-depth interviews conducted with previous ZGS leadership employees. Ultimately, the case study is intended to induce reader-reflection on the various components of importance in talent management, which play a significant role in accomplishing employee loyalty and employee retention.

ORGANIZATIONAL BACKGROUND

The Founding of ZGS

Zforce Staffing Solutions (Zforce), based out of Tampa, Florida, was founded in 1950. Zforce originally provided staffing services relating to finance and success and entry into the IT industry. Zforce continued to provide staffing in the field of finance and accounting; however, in the late 1980s, the company began centering their attention on information technology staffing. Highlights of Zforce Staffing Solutions' historical transition include:

- In 1950, Zforce was established as a finance and accounting staffing service agency.
- In 1965, Zforce became a franchise that eventually encompassed over 50 staffing service locations nationwide.
- In 1985 Zforce developed its first CRM software allowing them to monitor client and candidate needs on a daily basis.
- In 1986 Zforce hired its first information technology recruiter.
- In 1989 the firm's "Performer of the Year" was an IT recruiter who initiated the company's IT staffing division expansion.
- In 1995, Zforce became a Nasdaq-traded initial public offering (IPO).
- In 2000, the subsidiary Zforce Government Solutions (ZGS) was established.

Organizational Structure

Zforce founder David Witherford established the company with the intent of connecting clients with skilled and qualified employees. David Witherford has served as chairman and chief executive officer since the company's formation. His company vision is based on the idea that "great talent = great results." Senior-level management at Zforce was hand-picked by Witherford, based on his belief that for the organization to remain innovative, it needs to be led by visionary entrepreneurs. Figure 1 is an organizational chart illustrating the chain of command and where ZGS falls within the organizational structure of Zforce.

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Figure 1. ZGS within the Zforce organizational structure
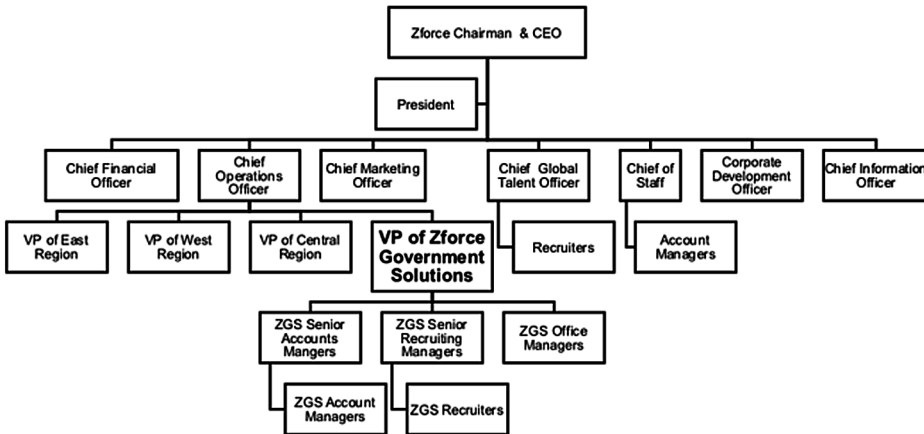
The Subsidiary

Both parent company and subsidiary specialize in staffing services; however, the subsidiary, ZGS specializes in enterprise information technology specifically pertaining to U.S. government entities such as the Department of Defense, the Department of Homeland Security, the Department of Interior, Department of Justice, and others. ZGS also provides staffing services to agencies such as the National Aeronautics and Space Administration (NASA) and the Central Intelligence Agency (CIA), as well as the Federal Bureau of Intelligence (FBI) and other state and city-level government entities, making ZGS a niche market service provider.

ZGS managed substantial business in various military and government locations across the U.S., resulting in nationwide business. Although ZGS was relatively small in size compared to its parent company Zforce, this was not reflected in its overall revenue contribution. In 2012, Zforce, comprised of over 2,600 employees, brought in an annual revenue of $1.5 billion, whereas the subsidiary, comprised of approximately 50 employees, brought in an annual revenue of $58 million. In comparison to ZForce employees, a ZGS employee brings in almost twice as much revenue. This contribution ratio earned ZGS "elite" status for its employees and a high level of regard by senior leaders of the parent company, particularly Zforce's chief operating officer, to whom ZGS's management reported. ZGS's success also earned free reign from the parent company, leaving ZGS management to run the business as they saw fit.

SETTING THE STAGE

Industry Background

The staffing industry, comprised of more than 20,000 staffing firms and nearly 17 million staffing employees, contributes over $160 billion to the U.S. economy (Davidson, 2020). The staffing industry has held a formidable portion of the U.S. economy since World War II, and that effect has only increased with time (Nace, 2019). Since the 1940's, the staffing industry has continued to grow, and interestingly enough, seems to flourish even when the economy is down and other industries are negatively affected. Research done on the effect of the 2008 financial crisis on the staffing industry claims that in tough economic times and instability, companies prefer temporary staffing due to cost savings on employee benefits, and employees turn to staffing organizations for work while they search for long-term positions (Olsson & Johansson, 2010). "Temporary and contract staffing firms play a vital role in the U.S. economy by providing employment flexibility for workers and just-in-time labor for businesses" (Lenz, 2008, p. 1). A poll taken by the American Staffing Association shows that organizations cite several benefits in using staffing agencies (Lenz, 2008). Former Federal Reserve chairman Ben Bernanke has stressed the importance of labor market flexibility and policies that facilitate retraining and job search by displaced workers, which are key functions of staffing firms.

Though the staffing industry is a wide and flourishing industry, staffing services particular to enterprise IT solutions supporting government and military entities remain very limited. There are a few agencies that have had spotty success in the niche industry. However, none offer the level of experience specific to the niche market, nor the level of established relationships in the field, to harness real competitive value against ZGS. While few staffing agencies have tried to break into the market, ZGS has remained the field expert for over a decade.

ZGS's Internal Practices

ZGS provides staffing talent to clients for a fee through monthly contracts billed at an hourly rate or through a percentage-fee based on the salary of talent provided for direct-hire. ZGS boasts that its success is built on their ability to build successful relationships both with clients (the from which ZGS recruits) and customers (the individuals ZGS places in employment). ZGS's mission statement and brand-promise center around "relationships and partnerships" and through their internal processes revolved around this promise.

ZGS applies a highly scrutinized internal recruitment process for hiring their staff. Recruitment refers to the process of identifying and attracting job seekers so as to

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build a pool of qualified job applicants (Kukreja, 2018). The main aim of recruitment is to ensure that the organization is adequately and effectively staffed at all times (Leigh-Compton et al., 2010). In order to effectively recruit a highly capable staff, ZGS had to identify various competencies, including soft skills that are needed for superior organizational performance. To understand the qualifications needed in internal staff, it is important to understand the roles of ZGS staff members. There are two sides to the staffing services provided by ZGS; the account management team is responsible for working with the client to bring a staffing requirement to ZGS, and a recruiting management team is expected to find qualified candidates to fill the staffing needs of clients.

Internal Recruiting and Critical Roles at ZGS

ZGS account managers are expected to build meaningful relationships with clients and work directly with them to develop a thorough understanding of their staffing needs. On the other end, recruiting managers work with the staffing candidates to help make a match between a candidate and a staffing need; however, the hurdle in this situation is the level and specializations of the candidates. For example, typical companies do not call for five to six interviews for each candidate they recruit, nor do they arrange for various government clearance requirements and, at times, doing so in complete secrecy. However, when hiring a chief information officer for the CIA, things can be complicated.

In addition to typical staffing requirements such as understanding the technical skill set needed and the cultural environment needs, government entities expect ZGS staff to provide employment candidates that hold or are able to acquire a government clearance. Often, after finding a qualified candidate who has the required technical skills, background, and personal fit, the process of receiving a government clearance can take a toll on the staffing plan. The government clearance process is a complicated one that can take beyond six months to complete, and sometimes after the long wait, the government refuses to issue a clearance to the proposed candidate. A government clearance refusal can send the staffing process back to square one after months of hard work; therefore, building relationships with clients that can withstand these obstacles is key.

Another vital element affecting the role of ZGS employees is the importance of establishing relationships built on loyalty and trust with high-level government and military officials. Due to the importance of constant direct contact in establishing these relationships with significant government and military officials, account managers and recruiting managers need to be exceedingly professional, highly punctual, and capable of building long-lasting relationships based on trust and loyalty. Due to their clientele being so significant and due to the additional criteria to which they must

adhere, ZGS account staff and recruiting staff are hand-picked and highly scrutinized in the recruitment process. Hiring highly professional, capable account managers and recruiters that are also dynamically skilled at relationship building and client and customer relationship management was historically a strength highlighting ZGS's internal recruiting success. Research shows that implementing an effective recruiting process is positively correlated with organizational performance (Delery & Doty, 1996).

Compensation, Perks, and Employee Retention Strategies

Research highlights employee benefits as a primary element in effective employee retention (James & Mathew, 2012). ZGS leadership recognized the importance of employee retention strategies and reflected this in their culture and compensation package. Account managers and recruiters at ZGS are compensated with a base salary, paid semi-monthly, and a candidate placement fee percentage as a monthly bonus. Most of the team at ZGS earn over $100,000 annually. Employees also had an attractive healthcare insurance program and an enticing retirement savings plan. Employee paid vacation time was another form of staff seduction offered by ZGS. ZGS also applied employee retention tactics through effective employee recognition strategies. In fact, Zforce was recognized in 2005 as a top-tier employee recognition strategist. Aside from an attractive employee compensation package, the company also encouraged friendly competition amongst producers by offering an all-paid vacation to a five-star location each year for its top performers bringing in revenue over a certain threshold. Zforce also produced monthly top producer reports, which were published on the company intranet, boasting top producer names, accomplishments, and revenue streams. It was not unheard-of for the CEOs to surprise top producers by flying out to their locations and taking them out to long, prestigious lunches, which were also featured on the company intranet page.

Management and Culture at ZGS

Lucrative compensation, flexible work hours, a work atmosphere that encourages fun and friendly competition, enticing team-building events, and the annual "Producers of the Year" all-paid five-star vacation are all perks that keep ZGS employees performing at their peak. However, it is not all "roses and sunshine." Considering that all ZGS account managers and recruiters are salaried employees, their workday is not limited to standard 8:00 a.m. to 5:00 p.m. work hours. Rather, they are expected to take care of business needs as they arise. For example, potential candidates who are employed may not be available to meet for an interview until the evening, or sometimes a client suddenly has an urgent need and wants five candidates to start

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work the following morning, leaving the ZGS team working through all hours of the night to get everything in order, in instances like these, ZGS employees are expected to do what it takes to close the deal regardless of the time of day or their personal needs. Also, the pressure to produce was no easy feat. With so much attention on achievement, an employee who was having a bad month would see their name sweep the bottom of many reports.

Most of the staff at ZGS has been with the organization from the beginning, some even before the formation of ZGS had been employed by Zforce and transferred over to ZGS upon formation. ZGS was driven by loyal, dedicated employees. The VP of ZGS had been with the company since its inception and was liked and respected by everyone in the office. He had a strong work ethic, resulting in a willingness to work long hours alongside his employees. He also had the capability to motivate his team through friendly competitions and simple gestures of appreciation, like long lunches on slow days. His awareness of the long work hours applied in busy times allowed him to be lenient at other times to show understanding and appreciation for his team's hard work. Leadership at ZGS applied a soft model approach to human resource management (HRM).

The Staffing Service Business Process

The process at ZGS begins with account managers who are required to make sales calls and schedule sales meetings in an effort to build staffing sales connections and pipelines, which ultimately result in staffing requirements. Once staffing requirements are received, account managers connect with the recruiting manager where the staffing requirement is dispersed upon the recruiting team or a specific recruiter for candidate provision. The key in this step is having and relaying an in-depth understanding of the required skill set, the cultural fit details, and any additional details pertaining to a good candidate fit. The account manager's accuracy level in understanding and portraying the requirement as well as the recruiter's ability to comprehend and recognize the vital components needed for a good match are the factors for effective staffing techniques. Zforce recognizes this element, and this is where most of their employee training is focused.

Upon hire, Zforce provides both account managers and recruiters with a week-long training conference. During this week of intense training, new account managers are trained on the various questions and components that must be collected for filling a staffing requirement. They are also trained to compose a realistic cultural understanding of the client's organization and to effectively portray this need to the recruiters. Recruiters, on the other hand, are trained on the importance of conducting effective searches to reach the right candidate pools, also on the importance of reflecting the requirement details in-depth and accurately to potential candidates, and

finally on the importance of effective candidate management so that the candidate placement is achievable. Both account managers and recruiters are also trained in customer relationship management techniques in order to establish long-term relationships of trust and loyalty. Figure 2 shows a ZGS process model outlining the company's steps used in talent management.

Figure 2. Zforce business process model
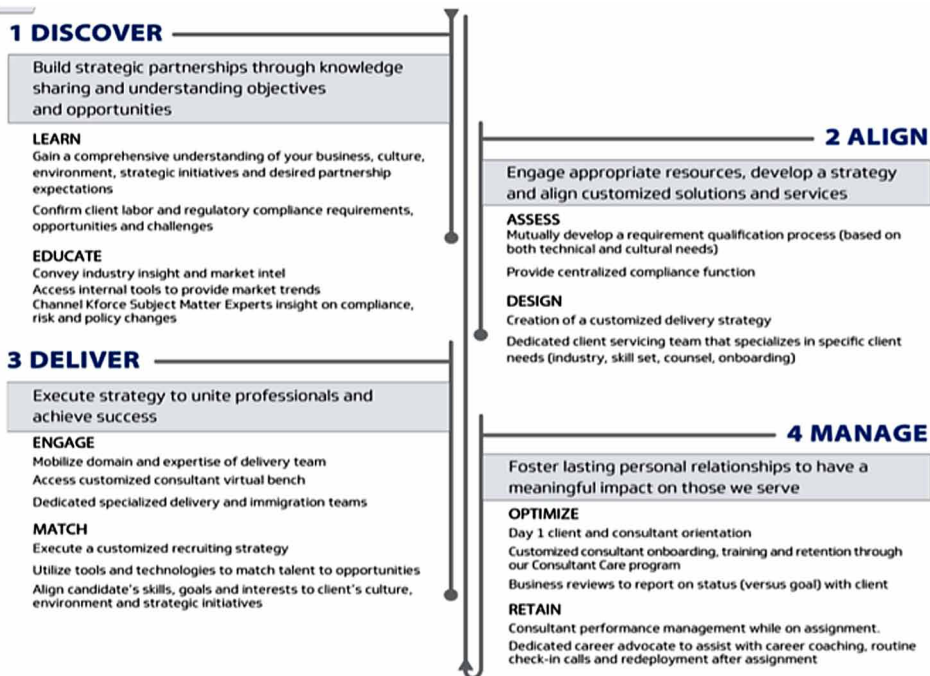
The Soft Model Approach

Soft model practices are a distinct form of HRM practices focused on the human aspect of human resources (Truss, 2019). The soft HRM model is an approach that involves treating employees as some of a company's most important resources (Ransom, 2003). Research indicates that management using soft HRM views its employees as critical resources who are key to the company's long-term business strategies (Ransom, 2003). Soft HRM includes a greater push to empower employees by encouraging them to take responsibility for their roles, open communication between management and employees, and more performance-based awards and

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recognition (Ransom, 2003). Table 1 illustrates the focal points of the soft model of HRM.

Table 1. Soft model of human resource management

(Jahangirnagar University, 2018)

The VP at ZGS did not believe in micromanagement but rather applied a participative approach in which employees had a voice in the decision-making process (McMillan, 2020). This also allowed employees the liberty to make decisions within their roles as they saw fit. This resulted in a culture that was relaxed and intimate, yet professional and loyal.

CASE DESCRIPTION

ZGS had seen many years of success stemming from the accomplishments of a small team that was accustomed to little interference from the parent company Zforce. With revenue and profits continuously exceeding corporate expectations, there was little involvement from corporate headquarters regarding the day to day operations. However, in 2011, things began to change for ZGS. After the U.S. financial crisis in 2008 and then the automotive industry crisis in 2010 and without any prior notice to ZGS, Zforce implemented changes to the ZGS organizational structure as well as the employee compensation package structure, adversely affecting ZGS forever.

One of the changes made in 2011 included the removal of top leadership from ZGS and the assignment of direct reporting of ZGS to Zforce Staffing Solutions' chief operations officer. This left ZGS's daily operations planning and monitoring

in the hands of a non-local chief of operations with little understanding of the company's previous cultural norms. Figures 3 and 4 illustrate the organizational structure change made in 2011.

Figure 3. Original organizational structure
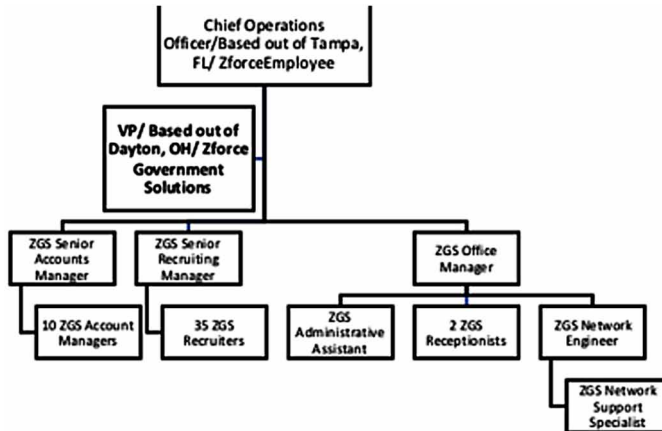
Figure 4. 2011 Organizational structure change
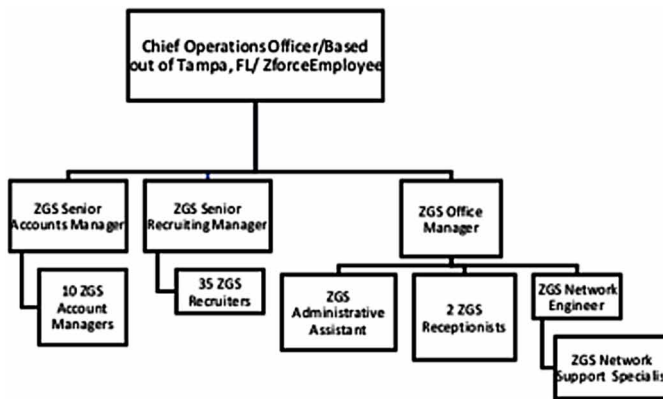
The organizational structure change was followed immediately by a complete revamping of the ZGS employee compensation structure. All recruiters were converted to sole, salary-based employees with no performance-based incentives, and account managers' salaries were increased slightly, but a significant portion of their performance incentives was canceled in return. Previously, account managers

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were incentivized in two ways in addition to their base salaries. First, they received a percentage of all monthly billing incurred on temporary employees they placed with clients. Secondly, they received monthly bonuses based on a percentage of any permanently placed candidates' salaries. However, they would not receive the percentage on monthly placed temporary employees, and they would receive a decrease bonus percentage on permanent placements only after the placement achieved six months of employment with the client without quitting or being released.

Though Zforce had historically applied a soft model approach in their leadership style, in this instance, that was not the case. Organizational leadership had made significant decisions affecting organizational structure as well as employee compensation, without the inclusion of employees in the decision-making process. One research points out that "though 'soft' views of HRM are embedded in the literature at the theoretical level, they do not, with the exception of a handful of 'lead' or 'exemplar' companies, appear to have been translated into practice" (Kane & Crawford, 1999, pp. 496–497). At times, there appears to be a major "disconnect between what the research literature says that firms should do and what firms actually do" (Kane & Crawford, 1999, p. 497).

Though research particular to soft model theory application in the staffing industry is minimal, soft theory represents delegation and employee empowerment across multiple industries. Soft HRM is associated with the human relations movement, the utilization of individual talents, and McGregor's Theory Y perspective of employees being viewed as individuals vs. resources, and gives workers freedom, so that they can be independent, strive for success, and be more creative (Truss, 1999). This perspective had historically been applied at ZGS in various forms, including but not limited to the freedom given to employees regarding long lunch hours, flexible work schedules, and employees' ability to make various staffing price adjustments at their discretion. However, with recent Zforce behavior, those liberties seemed to have been disregarded, as did the soft model approach. Effective application of Soft HRM gained through employee involvement allows for a commitment of people's hearts and minds, which, in turn, produces trust (Saha, 2013).

Gradually following those changes, performance began taking a slump; even top performers were suddenly hitting a wall, resulting in months of fallen revenue. The number of monthly closed-deals began to decrease, and eventually, account managers were making adjustments to their fee schedules in hopes of increasing their number of permanent placements. These developments caused concern for upper management, which brought down a degree of micromanagement. The Zforce chief operating officer had a Zforce senior account manager fly to the ZGS office location for a week to provide guidance and support to the ZGS office team. Business was taking a turn for the worse.

A year after the restructuring and compensation changes, the chief operations officer reacted to the decrease in revenue by visiting the ZGS office and notifying several employees (account managers and recruiters) that they were being put on probation for six months. If they did not improve their KPIs in that timeframe, they would be released from employment. Again, this behavior was contradictory to the previously applied soft model approach ZGS utilized. After years of Participative Management leadership, which allowed employees to take part in creating solutions, Zforce was now applying a centralized decision-making model in which 'decision-making powers are concentrated in a few leaders at the top of the organizational structure' (Pardo-del-Val et al., 2012, p. 1).

Within a month, employee disgruntlement became evident as accounts suffered, and office morale plummeted. One account manager relayed her feelings during that time as:

I felt betrayed. I helped build this company, and instead of asking what I needed to get out of the slump, they sent me a babysitter. It was not fair that after all those years of high revenue and being a top producer, as soon as my revenue stream took a hit, management put me on probation. They did not take into consideration that even the economy had not fully recovered.

Right before the six-month probationary mark was up, six account managers (including the senior account manager) and eight recruiters (also including the senior recruiting manager) from ZGS' elite team left ZGS to form TEKStaff, which would become ZGS's primary competitor. Within a year of the initial group of employees leaving ZGS, an additional account manager and four recruiters also left to join TEKStaff.

Following their departure, Zforce attempted to re-staff ZGS with additional account managers and recruiters, but the turnover level over the next two years was much higher than it had ever been, and ZGS never recovered from the damage done. Zforce leadership had no succession plan in place for ZGS, and re-staffing became a challenge. Unfortunately, many organizations do not recognize the importance of succession planning until it is too late, and they find themselves unsuccessfully trying to backfill critical positions. Truly understanding the role of succession planning allows leadership to recognize its value.

SUCCESSION PLANNING

The Society for Human Resource Management (SHRM) states that "Succession Planning is the practice of identifying the knowledge, skills, and abilities to perform

certain functions, and then developing a plan to prepare multiple individuals to potentially perform those functions" (SHRM, 2019, p. 1). In this case, Zforce was ill-prepared for the sudden departure of multiple critical employees, and this caused significant instability. Research shows that succession planning allows for the development of organizational stability in regard to the tenure of personnel (Rothwell, 2005). Historically, organizations only paid attention to replacing employees exactly before they were to leave the organization, and the decision about the people who would replace them was typically made by senior management (Greengard, 2001).

Succession planning is used as an essential and strategic tool for organizations to retain well developed, skilled talent in the workforce (Ready & Conger, 2007). When organizations lose essential staff members, as was the case with ZGS, they are highly vulnerable until that member is replaced and operating at full capacity again. The time between the member leaving and being replaced, workload elements can be slipping through the cracks and, in turn, causing a glitch in the overall organizational operation. One professional staffing firm notes:

In Succession Planning, it is important to acknowledge that there is rarely a candidate who will able to hit the ground running from day one as a successor focusing on this ideal will make the plan inflexible. Such an ideal will increase the time it takes to find the "perfect" candidate and decrease the productivity and performance of staff in the meantime. (Slayton Search Partners, 2016)

As a general synopsis, succession planning is a vital element that takes into account the organization's resources and focuses on the development of critical staff members (Mehrabani & Mohamad, 2011).

Effective succession planning allows for an organization to maintain a skills bank of job knowledge and position know-how, regardless of staff transitions. "Companies who stand to win in the market are those who prepare by identifying and developing successors, implementing retention methods to retain critical talent, and transferring the knowledge, talent, and leadership of critical employees" (Chavez, 2011, p. 15). If ZGS had a succession plan in place, a seamless transition of responsibilities could have alleviated some of the instability they faced when a significant portion of their staff resigned.

THE DILEMMA AND CHALLENGES FACING THE ORGANIZATION

Unfortunately, in many companies, the loss of long-term employees is followed by the loss of long-term clients, as was the case with ZGS. Many of their previous

clients followed their account managers to TEKStaff as the relationships they had were very individual-specific. Despite having been a top-producing firm, ZGS was now closing less than half of the annual business they had in the past. The staff harmony, once clearly evident at ZGS, was now a distant memory.

After several years as a top producing firm, ZGS lost their top talent in one fell swoop, and to add insult to injury, this group of top performers now became ZGS's primary competitor. After their initial loss of top talent, ZGS struggled to refrain additional staff members from resigning. ZGS's recruitment and employee retention practices were tested to reveal a broken system that needed reevaluation. After the loss of their previous loyal employees, ZGS attempted to replace them. However, they struggled with high levels of turnover, office discord, decreased revenue, and finally, loss of clients due to dysfunction in process control.

In 2015, ZGS barely represented the company it had been a mere four years ago. After their significant loss of experienced staff members, ZGS struggled to establish a new set of successful employees. Many new hires completed the company training and then struggled to achieve their quotas, resulting in a high level of turnover. In turn, the high level of turnover made it hard to effectively maintain client relationships. Maintaining established client relationships was vital for ZGS in understanding client staffing needs; however, with constant staff turnover, many candidate placements were ineffective, resulting in dissatisfied clients.

Effective recruiting was once ZGS's strongest quality. ZGS's talented staff was a primary factor of their original success, so why were they unable to achieve the same results when they attempted to re-staff? Or is their issue a factor of ineffective employee retention? Recognizing the primary factors for successful employee recruitment and retention is critical for assessing the issues that ZGS faces. Perhaps, the organization should refer back to the basics of employee recruitment and retention to determine where they are missing the mark.

Effective Recruitment and Retention: The Offense and Defense Fundamentals

Recruitment is a core function of HRM and, if done ineffectively, can result in business struggles associated with productivity issues, staff instability, office cultural issues, and wasted resources resulting from turnover and re-staffing. The process includes five related stages: planning, strategy development, searching, screening, and evaluation and control (Kukreja, 2018). Each stage plays a significant role in the overall recruitment process.

The Planning Stage

This part of the process focuses on analyzing the vacancy. Questions like the following should be considered when considering recruitment for a vacancy.

- What role does the job play in the overall firm's strategy?
- Where does the job fit within the organizational structure?
- What are the characteristics of the person required to fill the role?
- How can the job be made more beneficial to the organization as a whole?
- Can the responsibilities of the role be allocated to current employees?
- Is this new requisition truly needed?
- Was there any information left from the previous person in the role that can aid in making the position more effective?
- Should adjustments be made to the previous job analysis records?
- Can the position be filled internally? For example, by reassigning a current employee from another division? Or perhaps through promotion? (Leigh-Compton et al., 2010)

Once it is determined that recruiting is to proceed on a vacancy, a job description is formed. Well-composed job descriptions that reflect the need accurately are essential to recruiting success.

The Strategy Development Stage

During this stage, a strategy is devised for recruiting the candidates. Several factors are considered, like the level of candidate to choose and whether the company hires and trains a candidate or hires a more experienced candidate. Recruitment sources are also considered, determining what sources are available and finding the most appropriate among them. A suitable geographical area for the hiring process is determined as well, along with the method of recruitment.

The Searching Stage

Searching involves attracting candidates who are seeking jobs. There are two categories under the searching process: internal and external sources (Corner, 2019).

The Screening Stage

This is a reviewing process. In this stage, applications and resumes are reviewed by recruiters to create a short list of potential candidates. A second round could

be conducted if the organization wishes to develop a second shortlist (Corner, 2019). Finding the right person for the job is essential; however, that fit needs to be mutual (De Pedro, 2016). The position and company also need to be a good fit for the candidate.

The Evaluation and Control Stage

The evaluation stage is not only a chance for process reflection but is also a chance to track the costs incurred during the overall recruitment process to allow for any process improvement. Costs to be considered include (Corner, 2019):

- Salaries to the recruiters
- Costs incurred in ad placements and other recruitment methods
- Any costs incurred while the position was vacant (e.g., employee overtime and temporary staff costs)
- Compensation costs incurred in the recruiting strategy and plan development stage

These stages all come together to conclude the recruitment process. However, as ZGS found out, effective recruiting practices alone are simply not enough. Once recruiting has composed the perfect team of "elite players," it becomes time to play defense. All successful team sports are played with the perfect balance of "offense" and "defense." A team can score a lot of points, but if they cannot defend their goal, the opposing team will score as well, making it hard to win. This is also applicable to HRM. Once ZGS established their foundation for success by hiring a great team of employees, a recognition of important employee retention factors should have been their next focus. For successful HRM, a balance of importance needs to be applied between recruitment and retention. In the case of HRM, recruiting skilled, capable talent is the "offense," and the ability to retain that talent is a company's "defense." Now that we understand the offense, let us examine the defense.

Attracting, developing, and retaining talent is top of mind for many leaders and will continue to play an important role in competitive sustainability (Chavez, 2011). Employee retention is a basic phenomenon, an organization's ability to keep its employees; however, accomplishing this basic strategy is no easy feat. In order to increase employee retention, one must understand and recognize the reasons employees quit their jobs. Research provides that most employee turnover is due to one of the five following issues: management and leadership, job and organizational fit, personal and professional growth, compensation, or work–life balance (Mamun & Hasan, 2017). Let us examine each issue and the associated measures in which to increase employee retention.

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Management and Leadership

Many studies point to leadership and management styles as having a direct effect on employee satisfaction levels. One study points out that leadership styles and retention rates correlate and emphasizes a participative leadership style as being particularly effective in increasing employee retention (Kossivi et al., 2016). However, as illustrated by the events in this case, micromanagement can have a negative impact on employee retention. One study conveys, "The implication of micromanagement is that workers cannot be trusted" (Gilbert et al., 2011). One scholar points out that; employees value having proactive input and a participative role regarding productive processes; this, in turn, allows them to be capable of development and worthy of trust and collaboration (Gill & Meyer, 2011). Prior to company turbulence, senior ZGS account managers structured friendly office competitions amongst the teams, which typically resulted in higher than average revenue streams. Any office disagreements and issues were dealt with intimately by ZGS managers, with minimal effect on office performance. Interviews with prior ZGS employees revealed a general feeling of empowerment before the changes that took place in 2011. One interviewee shared the following: "Before the change (2011) the staff felt safe, like we were partial-owners in the organization. We felt empowered to do a good job for management, for our clients and our candidates. We were a real team."

Several studies have also linked supportive supervision to positive employee retention. Another key element reflected in research is the positive effect that employee involvement and decision-making ability have on motivation to remain with an organization. Employee retention being affected in a positive manner by leadership that values employees is another common thread agreed upon by field researchers (Kossivi et al., 2016).

However, research reveals that in unstable times, the role of HR managers changes through and following a recession, resulting in top managements' increased influence in business decisions, which typically arises from circumstantial cost-cutting measures, such as; restructuring (often resulting in the removal of staff members from the organizational structure) and the adjustment of pay structures (Tsao et al., 2016). Such practices, however, have been found to have a negative impact on firm performance (Tsao et al., 2016). Ensuring employees have a method through which they can voice concerns, disagreement, and requests will allow an organization to sidestep unfair treatment for the most part. An organization with strong communication systems enjoy lower staff turnover (James & Mathew, 2012).

The soft model of HRM emphasizes understanding people's individual self-direction, commitment choices, and their loyalty-based decisions as the center of any people-focused strategic approach (Truss, 2011). Before the turbulence began at ZGS, the environment was harmonious, and Zforce's management team was not

involved in ZGS' operational functions. They delegated the responsibility of general and daily management matters to ZGS's local managers, allowing local managers the authority to adjust client fee schedules within certain parameters and gave team members the liberty of a flexible work schedule, intervening only if abuse or issues arose. Employees had the privilege of taking long lunches on days where business was slow. These behaviors are all indicative of an HRM's soft model approach.

Job and Organizational Fit

Job and organizational fit are heavily based on the organizational mission, vision, and cultural dynamics in combination with recruiting efficiencies. A recruiter's ability to match the organizational dynamics with an employee's personal dynamics is key.

One study explains that have a good on-paper match for the job is not enough. Candidates must also have a good person-organization fit, and their characteristics must match those of the job and culture of the organization (Cloutier et al., 2015). Another study suggests that "implementing a well-designed assessment and selection process increases the likelihood of hiring people that can and will do the job at a high level in your environment and for your managers" (Hemalatha, 2020).

Organizational fit is also a prime factor of effective retention efforts. For example, ZGS employees had developed a certain level of cultural expectations based on the decade of practice in which they were managed by the VP of ZGS, who was familiar and a pillar of the local office culture. When this manager was replaced by an unfamiliar, non-local manager whose main focus was revenue and numbers, the ZGS staff were adversely affected. A study on change cites open communication, as well as employee participation and consultation, as means of preparing employees for change, and preparation for change will circumvent any resistance to it (Nelson, 2005).

Personal and Professional Growth

A study regarding employee development and retention states that "if employees feel they are not learning and growing, they feel they are not remaining competitive with their industry peers for promotion opportunities and career advancement, once that happens, they begin to look externally for new job opportunities" (Kyndt et al., 2009). As a motivator, employee training and development create organizational loyalty and build a cohesive workforce (Cloutier et al., 2015). Employees feel appreciated when a company allows them to expand their skillset and abilities. Career development allows for continuous training, which in turn creates successful leaders (Gray, 2014). While personal and professional growth is a determining factor of retention, promotion opportunities increase employee commitment (Kossivi et

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al., 2016). When a special interest is taken in employee learning, the result has a strong positive effect on retention (Kyndt et al., 2009).

Compensation

The correlation of compensation and employee retention has been a focal point of research for many decades, revealing that numerous research results show a positive employee retention correlation resulting from compensation increases (Kossivi et al., 2016). Management having transparency in pay decisions has been cited as a booster of employee retention (Kossivi et al., 2016). The unfavorable compensation structure change that took place at ZGS felt unjust to employees. Research indicates that when compensation changes are made in a manner deemed unfair, the response has a negative effect on turnover (Usrof & Elmorsey, 2016). Employee compensation is a highly sensitive matter that needs to be handled with care. A survey of 1,200 experts and practitioners revealed that rewards and compensation are vital to achieving competitive advantage (Milkovich & Newman, 2002). Soft HRM is hypothesized to fulfill employee needs, which subsequently is said to enhance favorable HRM outcomes. Fulfilling employee needs is said to increase organizational performance (Marescaux & Winne, 2013). Unmet employee needs in this case led to decreased performance and decreased revenue, which in turn resulted in reprimand through a probationary period that could result in termination of employment. A study from the *Journal of Organizational Effectiveness* explains that allowing employee participation in decision making, specifically concerning their own jobs, compensation, and work conditions, is a practice that results in greater organizational commitment (Schuler et al., 2014). One research points out that extrinsic rewards are vital contributors to positive employee retention rates (Hausknecht et al., 2009). Other research indicates that performance-related compensation enhances employee retention as well (Kossivi et al., 2016). However, one researcher points out that "to allow for a long-term effect, compensation must be coupled with a long-term factor, such as quality of work life" (Kossivi et al., 2016, p. 261).

Work–Life Balance

Work–life balance is a topic that has become highly prevalent in the past several decades. The challenges of integrating work and life's increasing responsibilities have left a great portion of the workforce highly focused on achieving a satisfactory balance. Many researchers believe that a harmonious balance between work and life is reflected positively in retention rates. One researcher found that offering employees a better-orchestrated work–life balance "reduces their intention to quit their job" (Osman, 2013). Other research explains that in the competitive markets

of today, it is essential to be able to rely on the most talented employees, not only to develop the activities of the firm but also to survive and succeed (Rodríguez-Sánchez et al., 2020). Many of *Fortune*'s "100 Best Companies to Work for in America" rankings cite "work/life programs as one of their top tools to attract and retain the best employees and give their companies a competitive edge" (Hemalatha, 2020).

Though these are common reasons for turnover, they are not the only reasons. Effective employee retention is a strategy that requires constant diagnosis regarding the nature and causes of turnover, because with changing economic elements, the nature causes change as well. Regardless of the reasons associated with turnover, one result of high turnover is always instability and issues with performance. In ZGS's case, instability was evident, and performance was significantly down. High turnover levels resulted in increased procedural errors and technical issues, due to inexperience or negligence. This in turn was reflected negatively in client retention levels. Overall, it was evident that something was broken; as to what that something was, management was at a loss. Zforce's senior management team desperately assesses the situation in hopes of determining whether the subsidiary was salvageable or simply beyond repair and should be dismantled.

CONCLUSION

In the case study, we have witnessed a company go from great success to complete turmoil. The problems that ZGS faced stemmed from two primary points. Each point presents the start of a new set of issues. To assess the situation successfully, both points should be considered. The first point for consideration being that the initial "point of impact" is "the cause behind the initial loss of staff members." The second point for consideration would be the factors resulting in ZGS's inability to re-staff effectively after the loss of their first-generation team members. Let us take a closer look at the parameters of these points, starting with the initial point of impact.

First Problem Point: Initial Staff Loss

The turmoil that ZGS experienced surfaced shortly after the 2011 management and compensation structural changes. Zforce decisions were made without prior notice, devoid of employee participation, or any apparent justification. This was received in different ways by the employees. The common tone, however, was negative.

Another issue that was prevalent in the period following ZGS's team loss was the lack of succession planning. Had a succession plan been in place, perhaps ZGS could have salvaged some of the previous field expertise through their second-generation employees. The Society of Human Resource Management explains that succession

planning is based on identifying the skills and knowledge that second-generation workers will need to do their jobs effectively in critical positions (SHRM, 2019). The society further explains that reductions in learning curves for critical positions could be achieved by passing on tactical knowledge gained only through experience, from one generation of workers to another (SHRM, 2019).

Second Problem Point: Ineffective Re-Staffing Attempts

Though ZGS's initial recruitment process was successful in bringing together an effective team of employees, that success was not repeated when they tried to re-staff following the loss of their first-generation employees. As witnessed in the case scenario, ZGS re-staffing efforts harbored issues with team harmony, performance levels, efficiency, and finally, employee retention. A 2012 study by the Center for American Progress notes that the "cost of replacing an employee ranges from 10 to 30 percent of their annual salary" (Waddill, 2019, p. 2), which was ultimately evident in the costs reflected by ZGS' client and business losses, and team productivity decline, not to mention, costs associated with recruiting.

ZGS's primary business strategies revolved around client and candidate satisfaction, which would result from successful client staffing solutions, ultimately leading to profitable and continuous client relationships. These strategies are highly dependent on ZGS maintaining a capable and stable staff. Effective recruitment factors include a company's ability to attract experienced and skilled workers that are a good fit for the company's culture and strategic need. From an HRM perspective, recruitment and selection reflect broader staffing strategies and represent the first element in aligning HR and organizational strategy outcomes.

These problems highlight the turning points in ZGS's history. History provides many examples of businesses that have witnessed great success yet ended in extinction. Having a great business concept is simply not enough for a business to maintain long-term success. Follow-through effective business tactics need to remain in place for a business to have continued success. In this case study, Zforce experienced success for over a decade, breaking into a completely new industry sector and developing an internationally recognized brand and recognized field expertise. ZGS was a force to be reckoned with. It shocked field experts, however, that in one fell swoop, ZGS hit rock-bottom. ZGS has traveled a long road over the past several decades. However, the road that was once smooth and seemingly effortless now seems to have directly led them to the base of a steep hill.

When the greater picture is considered, the niche market for government-entity staffing is still ZGS' to keep. Even though new competitors have risen over time, ZGS still maintains the longest record of documented field experience. Although ZGS faces internal staffing issues, client losses, and a botched reputation, they still

sustain a fighting chance. With field expertise as their credit to claim, ZGS should not be written off just yet. History provides that there are many great companies who have gone extinct; however, history also reveals those who have had comebacks against all odds. If history is any indication, with the right plan, ZGS still has every chance to rise again. But right now, the question remains: How?

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KEY TERMS AND DEFINITIONS

Centralized Decision-Making: A setup in which organizational decision-making is concentrated at the top of the organizational structure. Decisions are made at the top and communicated to lower-level managers for implementation.

Employee Turnover: The number or percentage of workers who leave an organization and are replaced by new employees.

External Recruiting: Recruitment of employees who are not currently employed by the organization. This process can be done through various outlets, such as campus recruitment, employment agencies, and advertisements about the job opening.

Human Resource Management (HRM): The process of recruiting, selecting, and inducting employees, providing orientation, imparting training and development, appraising the performance of employees, deciding compensation and providing benefits, motivating employees, maintaining proper relations with employees and

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their trade unions, and ensuring employee safety, welfare, and health measures in compliance with labor laws.

Internal Recruiting: The process of hiring employees from within the organization through promotions, transfers, and employee referrals.

Job Description: A document that defines the roles and the responsibilities associated with a job. It also includes the qualifications and skills needed to apply for the position.

Micromanagement: A behavior in which management attempts to control every part of a given situation.

Participative Management: A management style in which management encourages the involvement of stakeholders at all levels of an organization in the analysis of problems, development of strategies, and implementation of solutions.

Recruitment: The process by which an organization searches for prospective employees and stimulates them to apply for their open job openings.

Retention: The process by which a company ensures that its employees do not quit their jobs.

Succession Planning: The process of ensuring a back-up employee is groomed to replace another if the need arises. Succession planning allows the transfer of knowledge and skills from an employee to the successor, as a means of preparation for employee leave or internal position transitions.

Chapter 5
When the Process Fails:
Restoring Trust in a #MeToo Workplace

Lauren A. Turner
University of Massachusetts, Lowell, USA

Michael C. Beers
University of Massachusetts, Lowell, USA

EXECUTIVE SUMMARY

Details of a sexual harassment investigation were shared with members of the community by the employee who initially filed the related complaint and were subsequently leaked to the local media. Such details are regarded as confidential personnel matters, and parties to an investigation are encouraged not to discuss details in order to ensure full and impartial fact gathering. With that said, parties to complaints of this nature are not obligated to hold details in confidence – largely because it is their personal story. The broad distribution of details led to workplace protests, expressions of distrust of leadership, impassioned calls for greater transparency in handling of sexual harassment complaints by Human Resources, and a demand for review of sanctions levied on parties found responsible for violating policies. Leadership responded by convening a task force to examine current policies, to research best practices in sexual harassment response and prevention, and to recommend a plan of action.

BACKGROUND

The #MeToo movement has changed the workplace landscape, bringing heightened attention to people and institutions that engage in, or enable through inaction, behaviors that breach ethical and legal standards, and create a climate that tolerates harassment. Stories of these breaches are widespread and span industries, and higher education institutions are no exception. As the scope of this problem has become more apparent, employees have increasingly demanded that employers act to eliminate harassment, and an unprecedented number of consumers have demanded the same from the companies they patronize.

This new landscape provides important leverage for Human Resource (HR) practitioners to influence organizational leadership toward higher standards and accountability. With this in mind, this case incorporates facts and circumstances from actual workplace scenarios reflecting vexing challenges that organizational leaders encounter when facing allegations of (perceived or actual) mishandling of sexual harassment in their organization. The hypothetical sexual harassment incident, itself, serves as the initiating incident, but is not central to the story. This case presents a comprehensive institutional response aimed at setting the underpinnings for building a culture of inclusion – free of harassment and discrimination. The conceptual framework developed by Pless and Maak (2004), which places organizational norms and values as central components, is applied.

The case illuminates the inherent complexities of handling sexual harassment complaints and explores leadership and organizational responses and actions. It illustrates how the activism and courage of some members of the workforce influenced these actions and how the task force engaged its charge from the president. The case examines the role of key stakeholders, the factors which drove the emotion-laden discourse, and outlines immediate and longer term organizational impacts. The case further examines specifically the role of HR practitioners in serving in the dual role as steward of an organization's legal compliance and as neutral investigators of sexual harassment complaints.

HISTORY AND CONTEXT

A newspaper article detailed an investigation of a complaint which found an administrator in violation of the organization's sexual harassment policy, and the resulting sanction of demotion with a substantial reduction in pay. Employees and students protested the sanction levied as being too lenient. The workplace climate quickly heated and emotions charged. Organization leaders were caught off guard by the reaction of the community, especially the apparent deep lack of trust in

administration – with a great deal of anger and frustration directed at the human resource function. Senior leadership needed to repair the tears in its credibility in order to move forward with meaningful sexual harassment reform, but meaningful reform is very challenging to implement without trust in leadership.

The above narrative, unfortunately, describes an all-too-common phenomenon in today's higher education workplaces.

The higher education institution (HEI) that is the subject of this hypothetical case is located in the Northeast region of the U.S. It has over 1,100 employees and 8,000 students. In spring 2017, a Title IX sexual harassment investigation was opened into the conduct of a university administrator. The Office of Equity & Inclusion (OE&I) conducted an investigation, during which several measures were taken to prevent the interaction of this individual with the reporting party. OE&I's investigation found that the administrator had violated the university's non-discrimination and sexual harassment policy; and hence, he was found responsible for the alleged behavior. The OE&I investigation was concluded in summer 2017, and subsequent notice of the findings was made to the reporting and responding parties. Further, in mid-July, notice of disciplinary sanction was made to the administrator, which resulted in substantial salary reduction, reducing both his present income and his future pensionable earnings. Following the conclusion of the investigation, OE&I also took steps intended to prevent a recurrence of similar behavior that violated university policy.

Though the specifics of the investigation were confidential by state law as they pertain to personnel records, in early 2019 they became an open secret among faculty, staff, and students. As further background, in January 2019, several faculty and staff created a task force to examine university policies and procedures relative to sexual harassment as many organizations around the country, including colleges and universities, were dealing with issues related to sexual harassment in their workplaces. In the course of their work, members of the taskforce learned of the case outlined above and initiated a petition that was much-publicized and widely-circulated across the university demanding that the administrator be terminated from the university.

Signatures on this petition demonstrated that many faculty, staff, and students felt that a trust had been breached. There were continued protests and more signatures. In spring 2019, the president appointed a 35-member Sexual Harassment Task Force (SHTF) with the formal charge of reviewing the university climate, culture, policies, and practices around sexual harassment and recommending changes.

THEORETICAL FRAMEWORK: BUILDING A CULTURE OF INCLUSION

Organizational culture consists of artifacts, values and norms, and basic assumptions (Cheung, Wong & Wu, 2011; Hatch, 1993; Schein, 1993). Organizational climate is "the shared perceptions of and meanings attached to the policies, practices, and procedures employees experience and the behaviors they observe getting rewarded and that are supported and expected," (Schneider, Ehrhart, and Macey, 2013) and relies on both individual and shared perceptions about how fairly and effectively employees believe the organization is treating them (Kossek & Zonia, 1993; McKay, Avery, & Morris, 2008; McKay, Avery, Tonidandel, Morris, Hernandez, & Heble, 2007; McKay, Avery, Liao, & Morris, 2011). That is, organizational climate is perceptual, while organizational management practices are structural and serve as an antecedent to organizational climate. Scholars have explored a wide set of management practices that are important components of organizational strategy aimed at supporting an inclusive work climate (Bell, 2011; Dass & Parker, 1999; Goyal & Shrivastava, 2013; Kalev, Dobbin, & Kelly, 2006; Konrad, Yang, & Maurer, 2016; Mor Barak, 2015; Mor Barak, Lizano, Kim, Duan, Rhee, Hsiao, & Brimhall, 2016; Theodorakopoulos & Budhwar, 2015). In particular, extant literature has explored the presence of management practices which are aimed at ensuring equal opportunity and non-discrimination (Boehm, Kunze, & Bunch, 2014; Dwertmann, Nishii, & van Knippenberg, 2016; Herdman & McMillan-Capehart, 2010; Kalev et al., 2006; Konrad et al., 2016).

Since increased workforce diversity is a reality, and now in the post #MeToo period, effective management of today's workforce calls for leadership commitment to dismantling the organizational barriers that inhibit an inclusive workplace climate, free of harassment and discrimination. We know that both leadership (Scott, Heathcote, & Gruman, 2011) and strategic human resource policies and practices play important roles in creating such an inclusive climate (Ashley & Empson, 2013; Konrad et al., 2016). However, it is also well-established that the presence alone of human resource policies and practices does not automatically make them effective (Nishii, Lepak, & Schneider, 2008).

Significant attention has been given to assessing the efficacy of HR policies and practices in fostering a climate of inclusion; however, less attention has been paid to the normative dimensions of climate which encompass the organizational norms and values that are foundational to an inclusive environment (Pless & Maak, 2004).

Organization members often look to leadership to uphold established values and norms. Furthermore, creating an inclusive organizational climate depends on the extent to which members of top management teams hold their subordinate managers and supervisors accountable (Hurt, 2016; Kalev et al., 2006), the extent to which they

are role models for inclusive leadership (Boekhorst, 2015; Guerrero & Kim, 2013; Pfeffer, 1981), and are committed to establishing inclusive practices (Ng, 2008; Ng & Sears, 2012). Pless & Maak's (2004) conceptual framework for building an inclusive culture places organizational norms and values as central components to fostering a culture in which all members are valued and respected and free to contribute their experience and talents to the realization of the organization's mission and objectives. Pless & Maak's (2004) framework is based on a moral theory of recognition. Moral theory of recognition entails four foundational principles: reciprocal understanding; standpoint plurality and mutual enabling; trust; and integrity – all working in unison to build a diverse culture of inclusion. Built on these foundational principles, Pless & Maak (2004) pose that organizations must engage a process with four essential transformational stages through which organizations can nurture a culture of inclusion that can translate to inclusive management practices. These four transformational stages are enumerated below.

Phase 1 entails raising awareness, creating understanding and encouraging reflection. Pless & Maak (2004) describe this phase as "an ongoing discursive learning process" through which people from diverse backgrounds, and who hold different viewpoints/perspectives, come together, and all voices are heard in the discourse (i.e., raising awareness of standpoint plurality). Through this discourse, common understanding of the issues can emerge, reflecting the diverse assumptions, knowledge, experience and beliefs held by individuals participating.

Phase 2 entails developing a vision of inclusion. Understanding the current state, and developing a vision which clearly articulates the change desired is essential. The development of this vision is an important process that should include multiple stakeholders with differing perspectives. This common understanding of the desired future state is important to ground the work needed to secure it. The process, itself, can build trust and credibility, can reduce resistance, and can build commitment to the work that will be needed to actualize it.

Phase 3 entails rethinking key management concepts and principles. An inclusive environment calls for a paradigm shift in how leaders function in organizations. Specifically, rather than a traditional, hierarchical, top-down approach, leadership becomes an inclusive relational and interactive activity which involves people from across the organization. Participatory decision-making is a key principle to creating inclusion and shared vision. The inclusion of multiple stakeholders lends greater knowledge and experience to the decision-making process and creates higher levels of trust, credibility and legitimacy to both the decision-making process and outcomes derived from it. Hence, translating decisions into actions will be more efficient and likely more successful.

Phase 4 entails adapting HR systems and processes. Pless and Maak (2004) identify several HR system and process change initiatives that can be leveraged to

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enable an inclusive culture, i.e., performance management, recruitment, employee awards and recognition, compensation, and employee and organizational development. This case study specifically illuminates the importance and benefits of employee development. In order to sustain a culture of inclusion that is free from harassment and discrimination, members of the organization must be held accountable to behaviors that are aligned with the values and norms of the desired culture of inclusion and employees should be equipped with the competencies needed to do so.

This transformational change process is modeled as an on-going and iterative process which can foster an on-going organizational learning process. It provides a useful framework and is applied as we consider the opportunities and challenges presented by the present case study.

Furthermore, many organizations have established practices to measure the effectiveness of their management practices in fostering a positive and inclusive organizational climate (Kossek, Lobel, & Brown, 2005; Thomas & Ely, 1996; McKay & Avery, 2005; Mor Barak, 2015).

SETTING THE STAGE

The organizational culture at HEI is progressive, engaged, and increasingly sophisticated. There is ethnic and religious diversity among faculty, staff, and students. The president of the university is a woman and half of the deans of its schools and colleges are women. The culture is emphatically egalitarian with an emphasis on social justice. Nearly 95% of the workforce, including faculty, are unionized.

The administration in general has a reasonably good and trusting relationship with the university community. The president herself was popular with faculty, staff, and students. Despite these good relationships, trust can be eroded when incidents occur that raise questions about leadership decision-making and commitment to a harassment-free environment, and there is a perceived lack of transparency.

Sexual harassment is a persistent workplace problem which results in physical, psychological and social negative effects on targets of harassment (Aggarwal & Gupta, 2000; McDonald, 2012) and significant detrimental organizational effects including reduced workforce morale and increased absenteeism and turnover, stress, and reputational damage (Chan, Chun, Chow, & Cheung, 2008), and costs associated with lawsuits (Posthuma, 2012). Scholars have examined prevention and response strategies and found that strategies that recognize sexual harassment as a systemic, versus individual, problem; that are based on clear behavioral norms and accountability, including prompt investigation and just penalties for violations; that provide multiple channels for communicating concerns; and that are supported by senior management in the provision of needed resources and effective role

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modeling are most effective (Bell, Cycyota, & Quick, 2002; Masters & Albright, 2002; McDonald, Charlesworth, & Graham, 2015; Miceli, Near, & Morehead, 2008; Thomas, 2004). Further, decades of research show that a comprehensive approach is necessary to change attitudes, behaviors and organizational/social norms toward preventing harassment. Transforming organizational cultures, and enacting inclusive organizational practices, are key to this change (McDonald et al., 2015).

Sexual harassment is pervasive and occurs at every college and university as well as in society at large, and HEI is no exception. The university had taken a number of concrete steps in the years leading up to these events including dedicating more resources to the Office of Equity & Inclusion (OE&I), implementing significant revisions to policies and procedures, restructuring reporting and investigation procedures, establishing extensive website content aimed at increasing visibility of policies and reporting options, and investing in improved campus-wide training. Still much work can be done to create a welcoming, safe and inclusive environment for everyone.

Antecedent Events

Two streams of events – one local, one global – led to the crisis HEI experienced.

In spring 2017, an HEI administrator had a sexual harassment complaint lodged against him by a subordinate. The complaint alleged a number of examples of behavior that ranged from highly inappropriate to impermissible. In summer 2017, the administrator was found responsible for violation of organizational policy and disciplinary action was invoked.

In October of 2017, two articles, one in the *New York Times* and one in *The New Yorker*, laid out extensive evidence that famed Hollywood producer Harvey Weinstein, founder of the production company MIRAMAX, was, in fact, a serial rapist and sexual predator. Over the next 18 months, a who's who of powerful men (and a few women) lost their reputations and careers. Some may still lose their liberty. Much of the world spent the next year in conversation about the implications of what was transpiring. In the United States, there was increasingly a sense that all workers were fed up with, not just incidents of harassment, but the underlying cultures that allow such conduct.

At HEI, there was extensive discussion of these events. Students and employees participated in sexual assault awareness campaigns and sexual harassment training, some of it newly created in response to this changing environment.

CASE DESCRIPTION

The Task Force

In response to the strong community reaction, the president called for volunteers and subsequently convened a 35-person sexual harassment task force (SHTF), representative of various employee groups and union leaders from across the organization, and charged them with a mandate to review the organization's sexual harassment policies and procedures, education and communication efforts; to research best practices in preventing and responding to sexual harassment; and to generate a comprehensive report recommending changes.

However, these straightforward tasks needed to be performed in the context of a significant loss of trust. There was skepticism about leadership's intentions, even (and in some cases especially) from members of the task force itself. A comprehensive, thoughtful report with well-designed recommendations that could lead to important reform would be meaningless if there was not trust in confidence in the university's commitment to change, i.e., the report would be viewed as whitewash.

Leadership was confronted with twin dilemmas. First, it was clear that the university community wanted updates to the procedures, practices, policies, and processes around sexual harassment and sexual misconduct. Second, leadership was confronted with skepticism and mistrust about its intentions. A meaningful proportion of the university community who were passionate in their righteousness of its cause and outspoken about their demands were calling for change. Leadership needed to revamp university policy and practice to demonstrate its commitment to a harassment-free environment, to rebuild trust, and to enhance efforts in the areas of education and prevention.

The first step in establishing the task force was determining its leadership and structure. Three individuals were chosen as co-chairs. One was a white woman, a senior vice president, who was a member of the president's executive cabinet. Another was an African American, male tenured professor. The third was a white man, also from administration, but not a member of the executive cabinet. None of the three co-chairs held content expertise in the area of sexual harassment, however, they were highly regarded and respected members of the university community. Given the lack of content expertise among the co-chairs, they requested that the president appoint members of the community who held this formal expertise to serve as advisors to them. In response, four members of the community, including three from administration and one from the faculty, were added – and they, along with the co-chairs, were named as the steering committee of the SHTF.

The task force itself was designed for inclusivity. Every stakeholder community at the university was represented. Every college and school in the university was

represented with faculty. There was extensive staff representation, including employees who worked in campus police, hospitality services, facilities, student services, and other operational areas. Students were represented at the undergraduate and graduate level as were athletes. Participants were, for the most part, self-selected. There was far more interest in participating on the task force than there was opportunity for people to contribute. As a result, when the SHTF membership was announced, the president also promised on-going broad campus consultation to enable as many members of the community who had interest to participate in this process.

A level-setting exercise at the beginning of the process helped to get the process off to a good start. A nationally recognized consultant with regulatory expertise in the area of sexual harassment in higher education in the United States led a one-day session that covered content on the current and shifting regulatory climate, prevention and education strategies, and effective policies and practices. This session was intended to get task force members up to speed on the law and regulations the university was required to follow and to develop some common language and understanding of the many complex issues entailed in compliance with non-discrimination and sexual harassment state and federal laws, including Title IX. Also during this event, there was a simple ice-breaker exercise at the outset that ended up being quite profound in its impact. Task force members were given assigned seats at round tables of seven in a large lecture hall. Seating was assigned to put people with others they did not know. All task force members were asked to introduce themselves, describe their jobs, and say why they wanted to work on the task force. It was this last item that generated a great deal of emotion and team bonding. A participating staff member at one table described being sexually assaulted at a prior place of employment, and wanting to participate in the task force so other victims wouldn't have the same experience. From this horrific experience, her passion was rooted in protecting future victims of sexual assault – everywhere and anywhere. Her personal experience, and her willingness to share it, were transformative to the task force process, specifically the relational aspects of discourse that truly called for participants to be open and even vulnerable at times. Sharing stories like these, and others less dramatic but still powerful for tellers and listeners, created early, strong bonds among team members.

Sub-Committee Structure

The co-chairs created four sub-committees that roughly paralleled the president's charge:

1.   Policies and Procedures;
2.   Communications;
3.   Training and Education; and

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4.   Organizational Culture and Climate.

Task force members were asked to self-identify on which sub-committee they wished to serve. Most task force members served on one sub-committee though steering committee members were on multiple sub-committees in order to ensure regular and on-going cross sub-committee communication.

Each sub-committee was approximately 8 to 10 members, although each group experienced the emergence of a core group that did much of the heavy lifting. Sub-committees began their work with a review of the university's current practices in their respective areas of focus, and then asked: Where are we now? What's working? What's not working? What are the perceptions of the community of the university's practices? Where do we want to be going forward? They explored best practices to inform their discussions and recommendations.

Transparency and Flexibility

The task force co-chairs made the decision very early in the process to make every possible effort at transparency. Documents and data were shared with the task force. When task force members didn't accept certain assumptions or constraints at face value, the co-chairs always sought to speak to decision makers and other stakeholders to gather whatever information or data task force members requested. The co-chairs made a related effort to be flexible in the processes and methods used and collaborative in overall governance.

One important example of the flexibility and transparency occurred in the very first meeting of the task force. During a question and answer session, one task force member inquired about the composition of the steering committee, why it existed, why its composition was pre-selected, and how the rest of the task force would be kept apprised of its work. In response, the co-chairs took suggestions from the task force for an additional person to be added to the steering committee. The co-chairs relayed the recommendations of the task force to the president and she agreed. A new member had been added to the steering committee by the next meeting of the task force.

Another example of transparency was the broad sharing of all meeting notes, presentations, and other working documents on a common shared drive so that task force members could stay up to date on other activity across sub-committees. This had the further practical benefit of improving the work itself as the systemic nature of organizations leads to contradictions, redundancies, and general interdependencies across the silos of work groups. The task force, for its part, emphasized transparency in its relationship to the university community. A dedicated website was created as a repository for all presentations and minutes of task force-wide meetings. The

task force leaders broadcast the availability of these documents to the university community to keep it informed and engaged. A further objective was to regain the trust of the community. Leadership believed in making community members partners in the work. This improved the quality of the work while restoring trust in leadership's intentions.

Not everything went smoothly. The task force sought input from the university community through multiple channels. Two public listening sessions – one for faculty and staff; one for students – were conducted to allow concerned and affected individuals to share their experiences around sexual and gender harassment on campus and to provide feedback on relevant university practices and processes. The recommendation for hosting these listening sessions was posed to the full task force by a member of the task force, a tenured member of the faculty. This task force member reported that a colleague, who serves as the Director of Diversity & Inclusion at a nearby institution, had used a similar approach recently to engage their community in a difficult dialogue and had reported a successful outcome. The SHTF largely modeled the structure of its listening sessions after the structure used by this other higher education institution. The president and executive cabinet were in attendance to listen to members of the community without judgment or comment. The intention behind this design choice of having senior leadership in attendance, but only listening, was an attempt to invert the usual power relations and give victims and concerned members of the community the control. To increase the likelihood that stories would be shared and that concerns would be expressed, the planning committee for these listening sessions posted an anonymous survey to the university's daily Announcements website, inviting members of the community to submit feedback for the session, and submitters were given the option to elect whether they wanted their comments to be read aloud by one of the task force members at the listening session. Guidance was provided to both individuals submitting contributions in advance and to those speaking live at the sessions that they should refrain from using names or specific identifiers in their comments. A few submissions were received via this website, and in practice, however, although these sessions were well-attended, very few individuals were willing to speak publicly at them. As one participating staff member put it, "You want me to get up in front of the my peers, my boss, and the entire leadership of the university and tell some of the most personal and humiliating details to everyone and on top of that, no one is even going to respond?"

Fortunately, the planners of these listening sessions had considered the likely chilling effects of leadership presence and came to the sessions with a contingency plan in case there were too few or no speakers. Although the setting was imperfect and didn't truly remove the power dynamic, the alternative plan provided for attendees to engage in dialogue at their round tables which included 8 to 10 attendees each.

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This small group opportunity to dialogue with colleagues was highly successful and made these listening sessions ultimately a valuable component of the task forces efforts to gather community input.

Consensus Decision-Making

Consensus-building happened at different stages and levels, formally and informally. Most of the work done by task force members was spent developing sets of recommendations within each sub-committee. Each sub-committee approached this differently, but very broadly all sub-committees went through iterative processes of open discussion of issues and concerns relevant to their charge, followed by development of recommendations. Though the task force was working against a deadline, each sub-committee went through as many iterations as necessary when developing their recommendations to gain consensus support among members. There was no formal methodology to achieving consensus, but rather was an unstructured process characterized by open discussion and mutual respect. These sub-committee recommendations were then submitted to the full SHTF for consideration, discussion, and potential inclusion in the task force's final full report to executive cabinet.

Once sub-committees had finalized their recommendations, the full task force would need to be reconvened so the recommendations could be shared with the larger group and members could engage in discussion and decide as a task force which recommendations would be included in the final report of the SHTF to the executive cabinet. To accomplish this, the SHTF had to develop an agreed-upon protocol for this review and decision-making process. A task force member, who is a tenured member of the faculty, recommended the use of a consensus decision-making process. A co-chair responded with a seeming dismissal of the idea, but noted that co-chairs would take that recommendation to the steering committee for consideration. The steering committee did some research to identify a model for consensus decision-making. They selected a process for consensus-building (Briggs, 2013) that would enable all voices on the task force to be heard, and for decisions to emerge from their voices.

The full SHTF met for over seven hours over three meetings to review and discuss all sub-committee recommendations. Members were deeply engaged at these meetings, and each recommendation from each sub-committee was given a full and open hearing and discussion. These meetings concluded largely with SHTF consensus on final recommendations and a full report including an outline of the task force structure, decision-making process, and recommendations was prepared and submitted to the university's president and executive cabinet. In total, 29 recommendations, each with several sub-parts, were included in the final report. These recommendations were presented in the order of the four sub-committees of

the task force that made them and spanned topics from identifying resources needed to support effective practices, formalizing and communicating organizational values, training and education, ongoing assessment of campus climate and operations, to collaboration with nine campus unions. Because of the decentralized sub-committee structure of the task force, and the desire to incorporate all recommendations that were endorsed through its consensus decision-making process, there was considerable overlap and redundancy in the recommendations from the four sub-committees. These redundancies were noted as emphasis on the importance of certain key areas identified for improvement.

Following the submission of the full SHTF report to the executive cabinet, the steering committee synthesized the content to reflect what emerged as eight overarching recommendations. Care was taken not to leave out components of sub-committee recommendations, and the final synthesis of these recommendations was shared with the full task force to ensure continued agreement and transparency of the process. The redundancy across sub-committees became more apparent through this synthesis process, and made the work of the executive cabinet in digesting and assessing the recommendations more efficient.

Table 1. Executive summary of these recommendations

1. Establish Permanent Council on Gendered Violence, Harassment and Discrimination
2. Consider the Office Equity & Inclusion's Physical Space and Administration Location within Human Resources
3. Support Best Practices for the Effective Resolution of Emerging Sexual Misconduct Matters
4. Promote a Culture of Collective Responsibility and Caring
5. Improve Communications about Policies and Values
6. Training and Education
7. Collaboration with Nine Campus Unions
8. Maintain Best Practice Standards for Title IX Proceedings and Clearly Communicate Procedures

The Human Resources Question

The participation of Human Resources (HR) representatives in this initiative aimed at cultural and practice changes with respect to sexual harassment was not universally welcomed by members of the task force. There is an obvious paradox. Human resources is the organizational function charged with managing complaints of employee misconduct of all kinds, including sexual harassment, and in protecting the organization from associated legal liability. When the behavior of a member

of the organization is found to be in violation of organizational policy, and such behavior counter to strongly-held organizational values, frustration, anger, and distrust is directed at members of senior leadership, including HR. On the other hand, HR is an important stakeholder itself in any reform effort to a process that is Human Resource-centric.

In the first meeting of the climate and culture sub-committee, a tenured faculty member who had been outspoken in her criticism of the administration in its handling of the case posed the question: How could the chief human resources officer (CHRO) be a member of a team seeking to reform a situation she contributed to making? The CHRO responded by acknowledging the difficulty her presence could pose, noted her commitment to these issues, and asked members to consider the importance of collaborating to identify solutions – noting her belief that the remedies would come from that partnership. Trust was earned, but it occurred slowly, over time, and although it was not fully restored, it was rebuilt sufficient to facilitate productive group work.

THE SPECIAL CHALLENGES OF COVID-19 PANDEMIC IMPLEMENTATION

In February 2020, the president sent the SHTF report to the entire university community with a call for public (or private) comments. The plan for next steps included a more comprehensive review of SHTF recommendations by the executive cabinet, including a review of community feedback. Following this, the SHTF would be reconvened in March to hear feedback on the executive cabinet's review of their report and recommendations – and to begin to develop an implementation plan. On Wednesday, March 11, during spring break, the university announced it was changing to fully on-line instruction, moving students out of residence halls (except for those who were homeless or otherwise not able to return home including several international students), and shifting its workforce to almost fully remote work.

Despite the administration's focus on its Covid-19 response and planning, the SHTF report remained a high institutional priority. The SHTF steering committee was invited to meet with the executive cabinet in mid-June 2020 to review the report and recommendations and discuss plans for follow up. At this meeting, key decisions were made for advancing actions proposed by the task force. The president commissioned a Council on Social Justice and Inclusion with two primary foci: (1) advancing the university's overall diversity, equity and inclusion agenda and (2) implementing the recommendations of the SHTF. The latter would be accomplished under the leadership of an on-going campus-wide committee on gender and sex-based discrimination, and began with the establishment of a comprehensive statement

of values. This statement rejects all acts of discrimination and harassment, and commits to promptly addressing them and continued efforts to prevent them from occurring. It further commits the university and its leadership to an institutional vision that centers diversity, equity, social justice and inclusion and advocates for transparency and systemic change.

Following the meeting with the executive cabinet, the SHTF steering committee developed a draft plan and timeline for implementation of taskforce recommendations. The full SHTF met for the final time at the end of June 2020 at which meeting the steering committee presented their proposed implementation plan to task force for comment and feedback. Because of Covid-19, this was all done virtually. Feedback was incorporated and will be passed onto the newly established committee on gender and sex-based discrimination, which committee reflects some continuity of membership from the SHTF.

Other recommended actions which were identified for high priority implementation included, but were not limited to, those examples enumerated below.

A review and revision of institutional policies and practices was completed to ensure alignment with the new Title IX regulations released by the Department of Education, slated to be effective August 14, 2020.

The institutional websites for the OE&I and Student Conduct were redesigned to include university statement of values; clear definitions of sexual harassment, sexual violence, and gender discrimination; sexual harassment and misconduct policies and procedures and resources available; options for reporting including clearly articulated rights of all individuals involved in the reporting and review process; and a statement outlining the range of sanctions that may result for violations.

Further education and training programs were developed aimed at building community member competencies in and sensitivities to the behaviors that are aligned with its values and norms and that are essential to a culture of inclusion – free from harassment and discrimination. Program content spans unconscious bias, to bystander intervention, to respect in the workplace and is slated to be delivered across campus, in collaboration with academic and administrative leadership, by a cross-campus team of trained facilitators. Additional workshop content is being developed targeted at community members in new roles, i.e., new employee orientation, and experiences at critical moments of transition, i.e., promotion to manager/supervisor roles. Primary aim with these programs is education and prevention. A very important recommendation of the SHTF was the offering of more in-person sexual harassment training for students, staff, and faculty. As this case goes to press, it is unknown if there will be *any* in-person training in the foreseeable future, much less additional in-person training. Cost and public health concerns both constrain the university's range of options at the present time.

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Members of the community were identified and trained to serve as a network of resources across the campus aimed at increasing accessibility to information about policies and reporting procedures, and to ultimately foster a climate of reporting. i.e., referred to as "ambassadors."

In establishing the Council on Social Justice & Inclusion, HEI has chartered a course for on-going discourse, engaging a diverse representative of community stakeholders, including faculty, staff and students, and has proclaimed its commitment to this transformational work in a highly visible way both internally and externally. There remains a very motivated broad contingent of stakeholders committed to this work, and lending a watchful eye to the potential for any institutional transgressions. This combination of visible leadership commitment, formal institutional structures, continued passion and desire for change, and transparency of discourse may present necessary conditions for this needed culture change. Further, taking this action to establish the Council at this time illuminates the importance of maintaining a commitment to these issues as a high priority, even in the face of a global pandemic.

CONCLUSION

The #MeToo movement has changed the workplace landscape, bringing heighted attention to people and institutions that engage in, or enable through inaction, behaviors that breach ethical and legal standards, and create a climate that tolerates harassment. This new landscape provides important leverage for HR practitioners to influence organizational leadership toward higher standards and accountability. With this in mind, readers/students of this case study are asked to explore the questions below as they consider the facts, circumstances and events of this case study especially emphasizing the dilemmas presented and the processes used to engage the community toward strategies to resolve them.

- How do institutions maintain transparency related to sexual harassment complaints, sufficient to maintain community trust, while preserving confidentiality of personnel matters?

  ◦ Does protecting the safety and privacy of those who report harassment strengthen a culture where reporting is encouraged?

If it does not, how can statutory compliance be reconciled with the desire for a just and inclusive culture?

- How does HEI's process reflect the four transformational stages that Pless & Maak (2004) pose in their framework for fostering a culture of inclusion?
  - Do you see evidence of all four transformational stages?
  - What are opportunities for further improvement?
  - How can HEI sustain future discourse, collaboration and shared decision-making that will facilitate an on-going learning process and ensure transparency and trust?
- What actions can human resources professionals take to foster a harassment-free climate? Factors to consider might include:
  - How are standards of behavior and accountability for behavior set and communicated?
  - Role of leadership, including HR leaders, in modeling these standards of behavior.
  - How can employee development, i.e., workforce training and education, be leveraged?
  - Other considerations?
- Given the current climate, what actions can Chief HR Officers (CHROs) initiate to leverage the widespread demand, by men and women, for a harassment-free workplace?

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KEY TERMS AND DEFINITIONS

Culture of Inclusion: A workplace environment where all members feel respected, valued, and included and in which their talents and contributions are encouraged; and where there is a pervasive sense of belonging and meaningful engagement occurs.

Human Resource Management: A set of integrated processes and dedicated resources aimed at the recruitment, retention, rewarding, development, engagement, and overall management of an organization's human capital.

Leadership: Top management team of an organization that is responsible for setting strategic goals and fostering engagement of employees towards achievement of these goals; responsible for oversight of organizational mission and purpose and for guiding managerial and administrative action.

Organizational Change: A process through which an organization realigns itself from a present to desired future state. Oftentimes alignment is associated with organizational structure, culture, values, processes, and procedures to effectuate this desired future state.

Organizational Climate: Artifacts, values, and norms and basic assumptions held within an organization; collective emotional response and state by workers towards the external environment and internal events of an organization; relies on both individual and shared perceptions about how fairly and effectively employees believe the organization treats them.

Sexual Harassment: Unwelcome advances, inappropriate language, conduct, or gestures of a sexual nature in the workplace.

Workplace Investigations: Often engaged in response to a complaint or other notification of improper conduct in the workplace; a formal process for collecting evidence, assessing the meaning of evidence, making determinations of credibility, and implementing any sanctions as appropriate.

Section 2

Contemporary Human Resources Management Issues

Chapter 6
Emergency in the ER:
When Traveling and Permanent Nurses Collide

Vance Johnson Lewis
University of Central Arkansas, USA

Jason L. Eliot
University of Central Oklahoma, USA

EXECUTIVE SUMMARY

Like many healthcare providers, Shepherd's Grace Hospital struggles to appropriately staff their Emergency Room. Electing to follow employment trends, the hospital has engaged with a staffing agency for four traveling nurses. The purpose of this case is to explore the challenges of bringing contingent workers into an organization and how these short-term employees are viewed by the others more permanently embedded in the organization and the community. Also of importance is how social and psychological capital develop within an organization and how these roles can conflict when translated into a leadership role. This case follows four days of events for a traveling nurse, a traditional nurse, the Director of Nursing Services, the Director of Human Resources at the fictional Shepherd's Grace Hospital in the real city of Little Rock, AR. Upon conclusion, readers are asked to analyze the actions of these four characters along with the interactions of their circumstances (personal, professional, and geographic) to make decisions for how the hospital should move forward.

BACKGROUND

Temporary or day laborers have been used for centuries. Historically, employment carried with it no guarantee of continuance and workers, who were not in some type of indentured or forced service, had no expectation of any type of job stability. This changed in the late eighteenth century with the legal interpretations of British Judge William Blackstone, who offered that unless otherwise stated at the beginning of employment, one could expect that positions should last for one year (Blackstone, 1893). These interpretations were later used to create the idea of "employment at will" where in both parties agreed at the onset that either could terminate the contract of employment at any time (Summers, 1983). Today, the idea of at-will employment is seen as the counterpoint for right-to-work employment, in which employees have the ability to leave a position "at-will" but employers can also end the worker's employment at any time without reason or notice, under legal regulations. These legal regulations, which are meant to protect employees from unlawful termination, have been credited for the pronounced rise (an estimated 15%) that was seen in contingent workers during the mid to late twentieth century (Miles, 2000).

The modern view of contingency in the United States can be found in the mid-nineteenth century where a shortage of labor within the mining and railroad industries sparked the creation of a contract labor system designed to attract cheap labor, primarily from immigrants (Clouatre, 2020). By definition, a contingent worker is one who does not have an "implicit or explicit contract for ongoing employment" ("Contingent", 2018). Contingent workers can be subdivided into three categories: 1) temporary help, those sent by an agency to fill a temporary need; 2) direct hire, those hired in house to fill seasonal or occasional work, and 3) independent contractors, those hired by an organization to complete a specific task (Bauer, Truxillo, Mansfield, & Erdogan, 2012). Today, it is estimated that 20% of the American workforce is contingent, with that number expected to rise to 50% by 2030 (Noguchi, 2018).

For Contingent Workers

Benefits

While the nature of many jobs might seem a natural fit to contingency design, the rise in the number of contingency positions indicates potential benefits to those using their skills in such capacity. For the contingent worker comes primarily the ability to choose how and when they will work (Independent Contractors, 2020). Women, especially those with specialized skills, benefit from contingent situations in that they have more control over their working conditions and work/life balance

than do their traditional counterparts (Albert & Bradley, 1998). Overall, contract employment has been shown to allow for higher levels of life satisfaction (Green, Kler, & Leeves, 2010) and lower levels of role conflict and job conflict (Parker, Griffin, Sprigg, & Wall, 2002).

Drawbacks

Unexpected downsides of a contingent lifestyle are potentially found in one's personal rather than professional life. While there are the previously mentioned benefits for women in balancing career and family, a study by De la Rica and Iza (2005) found that contingent employment was a barrier to women in deciding to have a child. The same study found that men in contingent employment are more likely to delay marriage than their traditional employment counterparts, a finding echoed by Ahituv and Lerman (2005) who found that job instability among men led to lower probabilities to marry or remain married than those in stable positions.

While higher levels of life satisfaction are seen for contingent workers, these same individuals tend to exhibit lower levels of job satisfaction (Green, Kler, & Leeves, 2010) with the job satisfaction being correlated to the length of the contingent position (De Graaf-Zijl, 2005). As over half of all contract workers work without benefits (Noguchi, 2018), having to manage their own administrative tasks such as payment of taxes and procurement of insurance can lead to increased stress and contribute to lower job satisfaction for the contingent worker.

For Organizations

Benefits

The benefits of contingency are not limited to just the worker; organizations can also benefit greatly from the use of contingent labor, with the primary benefit of costs. For the organization, the use of contingent workers allows for much greater flexibility for market reactions (Hagen, 2003). When faced with the need to increase production or service, managers can simply bring in someone who already knows how to do the work therefore saving the organization the expense of both filling the position and the downtime for training the new employee (Gallagher, 2005). Likewise, when faced with the need to fill a short-term absence of a traditional employee, the organization can simply bring in a contingency worker without the expenses of a long-term connection to the company, not just including benefits, but also the costs associated with termination such as severance packages and reputation damage (Foote & Folta, 2002; Houseman, 1997). Finally, the contingent worker

provides the organization with an opportunity to utilize a specific skill or talent that is simply not needed on a long-term basis (Gallagher, 2005).

Drawbacks

While the organization can benefit from contingency, just as with the worker, the potential for drawbacks certainly exists, with perhaps the biggest issue being that of belonging. Even though a contingent worker does their job right alongside permanent employees, the fact is that they are not actually part of the organization. While little difference is found in the quality of training between contingent and traditional employees, contingent workers generally receive less personal investment from the organization than do their traditional counterparts (Sauermann, 2006). Contingent workers are often less likely to voice opinions and concerns out of fear for loss of future employment (Aronsson, 1999) and are often left out of participative decision-making processes (Parker, Griffin, Sprigg, & Wall, 2002). Unions have even been observed to alienate contingent workers and place them subservient to the traditional employees (Byoug-Hoon & Frenkel, 2004).

Another drawback for organizations utilizing contingent workers is the job satisfaction of both the contingent and the perceptions of permanent employees. A meta-analytical review of 72 primary studies examining the difference in job satisfaction between contingent workers and permanent workers found that permanent workers were more satisfied in their job than temporary workers (Wilkin, 2012). Interestingly, a study published the following year indicated that the use of contingent workers by an organization is actually negatively associated with a permanent employee's perception of job security and their trust in the organization among other things (Pedula, 2013). Organizations must be aware that studies show contingent workers have less job satisfaction and their use could negatively impact the perception of the organization held by permanent employees.

Special Considerations

One often overlooked aspect is that contingent workers, just as with the temporary agencies of old, are employed by another organization. Subsequently, though they have extensive interactions on a daily basis with the client organization, the worker is a member of a different organization (Pfeffer & Barron, 1988). Some contingent workers form bonds with both the employing and client organizations (Liden, Wayne, Kraimer, & Sparrowe, 2003). Given the limited nature of the connection with the client organization and the almost non-existent relationship with the employing organization, a contingent worker can often have issues with organizational identity

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and forming collegial relationships (Dutton, Dukerich & Harquail, 1994; George & Chattopadhyay, 2005).

This dichotomy between employing and client organizations is of great importance for all those involved, including the employee, to consider. For management, it is important to recognize that contingent workers seek support just as traditional employees do and subsequently with appropriate support and investment, managers can get the same levels of commitment and motivation from both sets of workers (Hall, 2006; Kuvaas & Dysvik, 2009). Establishing a good relationship with the employing agency can also aid the client organization in providing the best conditions possible for the contingent workers (Buch, Kuvaas, & Dysvik, 2010).

For managers, it is important to consider the implications of social exchange theory, to which reciprocity is key. Treating contingent workers differently than their counterparts leads to negative results, often from both groups (de Graaf-Zijl, 2005). Even though the work productivity may not be affected, inconsistent treatment of contingent workers can lead to lower levels of workplace citizenship behaviors and overall workplace attitudes (Ang & Slaughter, 2001). Though it might be assumed that contingent employees are less personally invested and therefore not concerned with increased responsibility, investing more in these employees through job enrichment has been shown to induce positive responses and promote increased positivity and performance for contingent workers (Connelly & Gallagher, 2004; Coyle-Shapiro, Morrow, & Kessler, 2006; De Cuyper et al, 2008).

Use of Contingent Workers in Hospitals

Like other industries, the use of contingent workers is prevalent in health care. In particular, the use of contingent nurses, often called traveling nurses, is prevalent in hospitals where 56% of hospitals in the United States (U.S.) used traveling nurses in 2001 and by 2006, and 75% of U.S. hospitals used agency nurses to supplement their employed nursing workforce (Xue, Aiken, Freund, & Noyes, 2012). Hospitals across the U.S. continue to face a shortage of nurses, at times exceeding 100,000 nurses (Haddad, Annamaraju, & Toney-Butler, 2020; Wells et al, 2018). The current shortage of nurses is projected to increase 12% by 2028 (U.S. Bureau of Labor Statistics, 2020). Traveling nurses provide flexibility and allow organizations to adapt to their circumstances and are increasing in value as a contingent workforce (Tuttas, 2013).

Traveling nurses are nurses who typically travel from one community to another and fill a short-term position lasting generally between two to four months (Wallace, 2020). These positions are typically contract based and may last for multiple contract periods extending the length of the placement (Wallace, 2020). Travelers allow

hospitals to meet immediate acute staffing shortages or to fill planned longer term needs created by the nursing shortage (What is a Travel Nurse?, 2020).

The Challenge for Traveling Nurses in the ER

While nursing as a profession can be quite difficult, the role of the Emergency Room nurses can be all the more difficult due to the higher pressure situations as well as incidents of abuse, both physical and mental (Haddad et al, 2020; McDermid, Mannix, & Peters, 2019). In one study, 20% of ER nurses experienced verbal abuse more than 200 times in a 3-year period and 20% of ER nurses experienced physical abuse more than 20 times in a 3 year period (McDermid et al, 2019).

The work environment also contributes to the difficulty of being an ER nurse. Working in the ER is a unique experience for a nurse (Enns, & Sawatzky, 2016). Nurses often work with inadequate staffing and excessive workloads (McDermid et al, 2019; Enns & Sawatzky, 2016; Gorman, 2019). ERs across the U.S. are seeing more and more patients because of both the aging population and an overall decline in health (Gorman, 2019). The environment has been described as "working in the trenches" where ER nurses "eat their young" (Gorman, 2019, p. 133), referring to how younger nurses have no transition periods from their training to regular work. These factors among others are factors driving burnout and turnover in ER nurses (Abellanozza, Provenzano-Hass, & Gatchell, 2018; Hunsaker, Chen, Maughan, & Heaston, 2015; McDermid et al, 2019; Robinson, Jagim, & Ray, 2005; Jourdain, & Chenevert, 2009, Nursing Shortage, 2020). ERs facing burnout and turnover also face productivity, financial and quality of care issues (Abellanoza et al, 2018; Enns & Sawatzky, 2016). Vacancies created by the burnout and ER turnover are difficult to fill and are opportunities for traveling nurses.

For Traveling Nurses

Benefits

There are many benefits of being an agency or traveling nurse. First, agency and traveling nurses are paid more than staff nurses (Travel Nursing Statistics, 2018; Hurst, & Smith, 2010). Travelers typically receive a standard set of benefits similar to full-time staff employed by the hospital including medical and retirement (What is a Travel Nurse?, 2020; Wallace, 2020). They may also receive other benefits not typically offered to hospital nurses such as housing stipends (Travel Nursing Statistics, 2018), bonuses, and flexibility on choice of shift (What is a Travel Nurse?, 2020). Finally, traveling nurses have the ability to choose when and where they work (Wallace, 2020).

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Drawbacks

There is a perception that the use of travelers can lead to reduced quality of care. One study found the use of agency staff led to increased medication errors (Hurst, & Smith, 2010). However, two other studies found their use did not have any effect on quality outcome, positive or negative (Xue et al, 2017; Faller , Dent & Gogek, 2017). For the nurses themselves, having to change hospitals and geographic settings every few months can lead to both personal and professional challenges including learning new hospital practices and equipment along with simply having to establish relationships both in and out of work (Wallace, 2020). Traveling nurses often suffer from a feeling of isolation (What is a Travel Nurse?, 2020) and can be the target of hostile and unwelcoming communications from permanent nurses (Gan, 2020). In addition, given their short-term assignment, they may actually disrupt the cohesiveness of an already established nursing teams (Hurst, & Smith, 2010).

Special Considerations

Resilience

Burnout and the exposure to traumas such as physical and mental abuse are events which ER nurses face regularly. Resilience is one way for ER nurses to deal with those factors. Resilience is defined as "the positive psychological capacity to rebound, to 'bounce back' from adversity, uncertainty, conflict, failure or even positive change, progress and increased responsibility" (Luthans, 2002a, p. 702). Generally speaking, it is the ability of an individual to deal with a negative trauma such as violence in the workplace and return or bounce back to equilibrium meaning the place they were in before the trauma. Beyond bouncing back to the norm or the place they were before, resilience can also be an opportunity to improve the equilibrium (Youssef & Luthans, 2007). Having a high level of Psychological Capital (PsyCap), including resilience can reduce an individual's intention to quit (Dhiman, & Arora, 2018). Importantly, researchers have determined that resilience can be developed in individuals (Masten, 2001) and nurses (McCann, et al, 2013). ER Managers can reduce turnover and address burnout issues by increasing the resilience of their ER nurses (Gorman, 2018).

Nurse Manager Relationship / Leadership

The role of the ER manager is critical to the success or failure of a traveler placement. The manager is who sets the tone in the relationship between the traveler and the full-time nursing staff (Ronnie, 2019). ER nurse managers are the ones best

positioned to deal with the challenges faced by ER nurses every day (Gorman, 2018). The relationship between the ER nurse manager and the ER nurse can create an environment where nurses feel comfortable about discussing their concerns and issues facing the department and can ultimately help improve retention and job satisfaction (Abellanoza et al, 2018; Enns & Sawartzky, 2016).

SETTING THE STAGE

The following case study recounts the events of a high level Trauma Hospital in a metropolitan city in the Midwest United States. The name and location of the hospital, as well as the names of those studied, have been changed to allow the exploration of their story while respecting the privacy of the hospital and its employees.

Shepherd's Grace Hospital

Shepherd's Grace Hospital is a large hospital located in the Little Rock, Arkansas. One of several hospitals in the state capital, Shepherd's Grace was started in 1872 by the Episcopal church; however, today it is part of a large conglomerate of hospitals and clinics spanning the state as well as the nearby states of Louisiana, Mississippi, Alabama, Tennessee, Missouri, Oklahoma, and Texas. Though part of the larger conglomerate, Shepherd's Grace operates in a fairly autonomous manner, with a self-contained management system and budget. The hospital director serves as the only point of direct contact with the larger conglomerate and serves as the final decision maker within Shepherd's Grace. The director utilizes a great deal of empowerment within the functional organizational structure and allows those most closely associated with the necessary decisions to make them and encourages a collaborative atmosphere.

Shepherd's Grace Hospital is known for taking care of the sickest patients in the state, specializing in procedures such as multi-organ transplants and replacements, neonatal intensive care, and cutting-edge treatments for cancer. The typical patient who comes to Shepherd's Grace is suffering from advanced illness with the staff doctors being viewed as the best for cases that require highly specialized knowledge. The hospital primary serves residents of Arkansas, which is ranked 45th in the nation for healthcare (Arkansas, 2020); however, patients do come nationwide for some of the specialized care offered. Shepherd's Grace is viewed as a destination employer for those in healthcare due to the services offered, boasting multiple nationally renowned doctors, as well as the reputation for quality that it has earned.

Shepherd's Grace does however suffer from a staffing shortage. While the hospital itself attracts advanced cases, it does still offer emergency room services, being one

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of three hospitals and two emergency services clinics in downtown Little Rock, all within blocks of the state capital building. Like the other hospitals, Shepherd' Grace faces two problems: crime and poverty. Little Rock, with its population of just under 200,000 residents (U.S. Census, 2020), is ranked as the fifth most dangerous city in America, with an aggravated assault rate five times the National average and a violent crime rate of roughly 1.5 percent (CBS News, 2020). Of the residents in Little Rock, roughly 17 percent live at or below the poverty line and 10 percent of those under the age of 65 have no health insurance (U.S. Census, 2020).

The crime and poverty rates of Little Rock affect Shepherd's Grace in several ways. First, though the hospital itself does not focus on emergency room services, under the Emergency Medical Treatment and Active Labor Act of 1986, no emergency room can turn away a patient needing treatment. Although city ambulances tend to take patients to a different hospital, given its location, the emergency room at Shepherd's Grace still receives a sizeable number of patients at any given time with issues ranging from chest congestion to gunshot wounds. Even though the mission of the hospital is "To set the standard of excellence in medical education, research, and care for the community and the Nation", the hospital must still provide the same basic medical treatments expected of any emergency room. This disconnect between their mission and reality causes role dissonance among the front-line workers of the hospital, particularly those assigned to the emergency room.

The second issue faced by Shepherd's Grace is a staffing shortage. Again, given its crime rate, even with its modest cost of living, Little Rock is not viewed as a highly desirable place to live and the neighborhood surrounding Shepherd's Grace is viewed as only moderately safe and it is necessary for the hospital to maintain a certified police department rather than a security team. These issues combine to create a very difficult issue for the hospital in attracting nurses, in a field already facing significant shortages.

On average, Arkansas schools graduate 2000 nurses per year, however, the central Arkansas area alone typically has over 1000 job openings for nurses at any given time. Although almost each of the 40 two-and four-year schools in the state has some type of nursing degree program, only five are within a 30 mile radius of Little Rock. Other than the two major universities in the state, these nursing programs attract students who wish to stay in their local communities after completing their degrees; thus, the theory of place attachment plays a significant role in staffing hospitals as freshly graduated nurses in the state are not willing to permanently leave their home communities and relocate. While Shepherd's Grace does have success in recruiting nurses to work in their specialized services, they are left facing a small candidate pool, competitive hiring environment, and high turnover rate for nurses in their emergency services. To address this problem for the typically busier

summer months, Shepherd's Grace has decided to bring in four traveling nurses to ease the workload.

Janice: A Traveling Nurse

Janice is a 24-year-old graduate of Elmhurst College with a Bachelor's degree in Nursing. A native of suburban Chicago, Janice's parents were both union members in their fields: her father a mechanic and her mother a nurse. With nurses from Elmhurst being in high demand, Janice had planned to stay in the Chicago area as she had received multiple offers; however, she was introduced to the idea of becoming a traveling nurse by her advisor during her last year of study and was attracted to the idea of being able to spend time in different parts of the country and deciding for herself where she would work, for how long she would work, and for how much she would work. After consideration, Janice decided that being a traveling nurse would be a good career choice for perhaps the next five years after which she could then return to a permanent position in the Chicago area where she wants to marry and have children.

Janice started her first assignment in Phoenix, Arizona, for a 16 week stay in a large general offerings hospital where she was assigned to non-emergency surgery recovery. This assignment was arranged by Janice's advisor and Janice was employed directly by the hospital. While she liked this experience, Janice felt hindered by having to find her next assignment herself and decided to join Baxter Nursing Solutions, a placement agency for traveling nurses. Janice went directly from Phoenix to Minot, North Dakota, working in the geriatric ward of a rural hospital for a 10-week placement after which she decided to take one month off, where she returned to Phoenix to visit her boyfriend who she had started dating during her placement. Janice's next assignment was in Stillwater, Oklahoma, in the emergency room of the only community hospital in the county. Here Janice was exposed for the first time to the challenges of emergency rooms dealing in issues ranging from broken bones, heart attacks and a number of patients with pneumonia. Despite being the only hospital in the county, the volume of patients was low, with Janice assisting fewer than 10 patients on any given night.

Janice took two weeks off after Stillwater before beginning a 16-week assignment in the emergency room of Shepherd's Grace Hospital in Little Rock, with the assignment running from late spring through the summer. Her agent at Baxter told Janice that this would be a very intense position but that the experience she would gain at Shepherd's Grace would allow her to command much higher pay and would be a highly valued position when she decided to stop traveling and take a traditional position. For her contract, Janice would receive a salary 15% higher than traditional nurses in the ER as well as a furnished apartment in a gated community one block

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from the hospital. Along with being excited to work in a busier ER, Janice was also excited that the Little Rock Airport was nearby and offered easy flights to Phoenix.

Cheryl: A Traditional Nurse

Cheryl has been working at Shepherd's Grace for 20 years, having started her employment as a nursing assistant while still a student at The University of Arkansas at Little Rock. She transitioned from nursing assistant to nurse once she graduated and passed the nursing exam on her first attempt. Now in her early 40's, she was recognized last year at the annual fundraising dinner for her 20 years of service. She had previously been named "Nurse of the Year" twice. Cheryl has three children, ages 15, 16 and 19, and has recently remarried after her first marriage ended in divorce after 16 years. Cheryl grew up in Little Rock but now lives in the suburb of Maumelle, a 20-minute commute to the hospital.

Cheryl is highly regarded within the hospital and community, with her years of experience respected by all. In the recent hospital newsletter, Cheryl was profiled during which another nurse said "*Cheryl has probably seen every bone of every person in Pulaski County…twice!*" She has certification to provide care to any patient who comes to the hospital and is the first choice among ER doctors for emergency procedures. For the last 5 years, Cheryl has served as the nurse preceptor, training new nurses joining the ER. The preceptorship typically lasts 16 weeks and the new nurses greatly benefit from having Cheryl as a mentor.

While having survived the natural ebbs and flows of life as an ER nurse, Cheryl has lately become decidedly frustrated with her work. Similar to other hospitals in the area (Oman, 2019), Shepherd's Grace typically employs newly certified nurses for three to five years while they are learning their field before they want to move on, either to specialized units or to different hospitals. She also has become increasingly frustrated with what she feels is apathy on the part of younger nurses causing her to jump in to assist patients when the nurses under her are not providing what she considers the appropriate level of care. Likewise, the level of admiration Cheryl receives from her peers and the more experienced nurses she has trained is not offered by the younger nurses who feel that Cheryl can be condescending and disrespectful. The stress of her role overload, coupled with a feeling of inadequate compensation, has not only caused Cheryl to develop resentment toward some of her coworkers but has also affected her relationships with her children and her new husband.

Olivia: The Director of Nursing Services

Olivia is the newly appointed Director of Nursing Services at Shepherd's Grace Hospital. Like Cheryl, Olivia is a native of Little Rock, however, she earned her degree at The University of Central Arkansas where she immediately earned a Master's of Science in Nursing after earning her Bachelor's degree. Based on her qualifications and recommendations, Olivia was hired at Shepherd's Grace straight out of college, starting in the cardiac unit before being transferred to the transplant unit, bypassing most of the entry level positions. Despite having little experience in Emergency Services during her 12-year career, the Vice-President of Operations recently promoted Olivia to the position of Director of Nursing Services. The VP felt that with the increase in specialized ER cases, such as cardiac and accident victims coming to the ER, that Olivia could greatly enhance the emergency room staff and offer them both technical knowledge as well as serve as an emotional leader given her naturally cheerful and caring disposition.

Though Olivia is generally well liked among her peer group, some have questioned her qualifications for the position of Director. Until this time, Olivia has never held a leadership position nor ever been responsible for the actions of other people. Her technical skills in nursing usually brought her to the forefront as the unofficial "lead nurse" during surgeries, sometimes having her arrange schedules and tasks, but she was never called upon in her career to make decisions that affect the entire department…or essentially anyone other than patients. Still, Olivia jumped at this promotional opportunity which brought with it increased responsibility, a higher salary, and took her out of the operating room from which she was ready for a break. Subsequently, she recognized immediately that the position would bring with it a different and perhaps higher level of stress, particularly in keeping the ER appropriately staffed. Faced with filling schedules with nurses who were already in overtime, one of Olivia's first decisions in her position was to contract with Baxter Nursing Solutions to bring four traveling nurses into the ER for 16 weeks.

Lynn: The Director of Human Resources

Lynn is the Director of Human Resources at Shepherd's Grace Hospital. Lynn grew up in nearby Sherwood, Arkansas, but attended college at the University of Texas where she earned a Bachelor's of Science in Human Resource Management. After graduation, Lynn experienced the usual progression of post-college positions, leading her to a position as a human resource generalist at a large hospital in Oklahoma City, Oklahoma. Having worked there for three years, Lynn was excited to learn of a position at Shepherd's Grace Hospital which focused on Organizational Development. Not only would the position be an opportunity to forward her career but also move

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closer to home. The position also carried with it a tuition reimbursement opportunity of which Lynn took advantage to earn her Master's of Business Administration online when she was hired for the position. In that role, she designed and delivered leadership training across the hospital which allowed her to meet and develop relationships with leaders across the hospital.

After spending 5 years on the OD team, Lynn accepted one of two roles of Associate Human Resource Director supporting certain units in the hospital, including the Emergency Room. She worked with those teams for close to six years before being promoted to HR Director three years ago. Some of Lynn's major accomplishments have been the development of the nurse preceptor program and the establishment of a flexible work schedule which allows nurses to determine, upon hire, if they want to work five 8 hour shifts per week or three 12 hour shifts per week, which, among allowing the nurses to match work/life commitments better, provides constant overlap with coverage schedules which reduces the number of occurrences of nurses having to stay past their shifts to get the replacement nurse caught up.

Lynn finds herself in a peculiar situation at Shepherd's Grace. On the one hand, she is the Director of Human Resources and therefore, per the organizational chart, has final say over all employment decisions. On the other hand, Lynn has no experience as a healthcare provider and thus has highly limited ability to understand the employment needs of the medical staff. This is not to say that Lynn is unsympathetic but rather is prone to looking at the hospital as she would any other business. In the short time Olivia has been in her position, Lynn and Olivia have clashed on some decision making regarding the employment of nurses, with Olivia feeling that, as the head of nursing services, she should have the final say on employment decisions regarding nurses. The situation is further complicated by both Olivia and Lynn reporting directly to the same Vice-President. Lynn had serious reservations about contracting with Baxter Nursing Solutions for the four traveling nurses over concerns of what effect having four people who trained somewhere else—and would know they were leaving in four months—might have on the permanent employees and culture. Still, Lynn ultimately supported Olivia's plan.

THE PROBLEM FACING SHEPHERD'S GRACE HOSPITAL

Janice arrived in Little Rock four days prior to her first scheduled shift in the ER. The furnished apartment was just as promised and Janice was left with very little unpacking allowing her time to settle in and explore the area before her scheduled orientation two days later. She thought it was rather odd that no one from Shepherd's Grace came to greet her but Baxter had provided contact information to the four traveling nurses under the contract and so Janice was able to meet-up with them and

venture out to get some necessary supplies and explore the area. The four traveling nurses were all roughly the same age, three women (Gretchen, Shaheena and Janice) and one man (Robert), and seemingly connected with one another well. The two other women had even worked together 18 months previously in Sarasota, Florida, and were excited to be working together again.

By the end of their free day prior to orientation, none of the four had heard anything from Olivia who they were expecting to contact them, so Janice decided to call her. Upon hearing it was Janice, Olivia was astonished that the quartet had gone without greeting as Olivia had specifically asked Cheryl to call each of them their first night in town and arrange lunch for the next day. Offering that it must have been a misunderstanding, Olivia was very apologetic and said that she would certainly make it up to them this week with a proper greeting. Janice offered to Olivia that these things happen and that she would look forward to seeing her tomorrow; however, after the phone call was over, Janice said to the other travelers *"this is going to be a long four months"* to which Robert joked *"Streeeerike one!"* Olivia on the other hand immediately called Cheryl…who did not answer.

The next day, the quartet decided to just walk over to the hospital for orientation. Even though the hospital and apartment complex were basically across the street from one another, the entrances required them to walk around the block and around the hospital, making for an awkward five-minute commute. The walk turned unpleasant for the team as they were accosted on the sidewalk by an aggressive vagrant wanting money. When they offered none, they were greeted with a slew of insults. As they hurried away toward the hospital, Robert said *"Streeeerike two!"*

Navigating their way through security, which horrified Shaheena who had never dealt with such at any of her three previous assignments, the four were directed to the human resources suite and were greeted by an apologetic Olivia, frustrated Lynn, and no Cheryl. Unbeknownst to Olivia, Lynn had approved three days of vacation for Cheryl beginning the day before. Not only was Olivia perturbed at Lynn for approving the leave but also at Cheryl for ignoring the need for her to train the four traveling nurses prior to their first shifts. *"This is just really embarrassing but we will get you four ready to go in no time"* offered Olivia. *"We have a great team and I know they will help you out…let's get into scrubs and we will just learn by doing!"* Typically, new nurses receive weeks of orientation to the hospital and their new unit. The orientation includes both classroom experiences and time with a more experienced nurse who they follow for the first few weeks of orientation and who follows them for the last few weeks of orientation before they are allowed to see patients on their own. Eliminating, or at least truncating, the orientation for these travelling nurses saves the hospital time and money – it is more efficient even if it does not provide the best development of the nurse.

The quartet went to the dressing rooms, changed, and started their orientation not in a classroom as expected but by going straight to the Emergency Room. The day went as well as Janice could have expected, and the volume of patients was actually rather low for which she was grateful. Once the quartet left, Olivia went to Lynn's office and told her "*I would not be surprised if none of them come back tomorrow. We basically are just throwing a blood pressure cuff at them at telling them to have at it.*" "*Yes, I do not think we did very well today but we are navigating unchartered waters with these traveling nurses. But they aren't novices; they should already know what to do even in a new place*" said Lynn. "*Anyway, why would we want to spend time and money to train them when they will only be here for a couple of months. Seems like a waste to teach them something that will only help them get their next placement,*" Lynn concluded.

Olivia's prediction did not come true and Janice's first shift came and went in a rather uneventful manner. The quartet were never scheduled to work with one another and so she arrived for her shift to a team of five other nurses, but only one, Grant, would she work with the entirety of her 12 hours shift. The team was a mix of newer and more experienced nurses, all of whom were from the Little Rock area and had worked at Shepherd's Grace since joining the nursing profession. Though no one was blatantly rude, Janice got the impression that they were all rather indifferent about their positions and suspicious of her and her Chicago upbringing. They were kind enough to the patients but did not seem to go out of their way to show much compassion for them…or to her for that matter.

Toward the end of the shift, Olivia came in to check on Janice and see how her day had gone. The day had been busy but Janice had performed with her usual skill and was pleased with her own work. "*It was a good day. I feel pretty confident moving forward*" she offered. "*Oh, I knew you would be a great fit when I met you. And look…you've accomplished in one day what usually takes them 16 weeks!*" Olivia proclaimed awkwardly. Janice noticed Grant roll his eyes as he walked away.

After a shower and supper, Janice took time to call her boyfriend in Phoenix. Knowing that she was not a fan of being asked how she thought she was going to like the job, Jeff focused his questions on the people and places. "*I would never in a million years want to live here. I mean if I wanted to get assaulted by panhandlers I would have just worked in Chicago. The people are nice, but I doubt there is going to be any effort to make me a part of the team. They all seem more akin to talking about where they went to school and their hometowns…I really do not see there being much opportunity for chit-chat.*" "*Well, you could always come back here!*" Jeff said half-jokingly. "*Well…I won't rule that out, but I do not think it would be possible until this contract is over. I have never heard of a traveling nurse just up and quit during a contract.*"

Janice's statement held true for another eight hours until she was leaving her apartment to go to her shift at which time she ran into Robert. "*Streeeerike three…I am outta here*!" he proclaimed. Janice listened in astonishment as Robert retold the events of the past few hours. "*Everything was going pretty well until 0400 when the EMT's brought in a shooting victim. Two of the nurses were on their break and even though they were sitting right in the break room, they would not come out to help. I mean come on! There was no supervisor on the floor and so the ER doctor was scrambling trying to get enough people prepped to take the poor man into surgery. Meanwhile, the police showed up and wanted to interview people…I am not sure who exactly…but they kept wanting to know if the guy was going to live. I guess maybe he was not exactly the victim in the whole thing. Either way, he pulled through and I think he is going to be fine. No thanks to the wonderful Cheryl. She arrived at 0600 and when I told her about the two nurses not coming off break for the emergency she actually said 'well, I understand how tired they are. I guess I should have taken another day off.' At first, I thought she was kidding but then she just went into her office and closed the door. I already called my agent at Baxter and he said that I would be suspended for two weeks without pay for leaving but that he already had a new placement for me. Hope we can work together someone sane next time…don't get mugged on your way in*."

Bewildered, Janice said her goodbye and got herself to the hospital. Still spinning from what had happened to Robert, she met Cheryl, who Janice could tell had been crying. "*Well, I know you have had a rough morning*" Janice said "*is there anything I can do to help you?*" "*Draw a name out of hat to pick if Lynn is the boss or if Olivia is the boss! As Robert was leaving, Olivia was arriving. She and I were discussing the events of the morning. Olivia has no clue about running an ER or what it takes to be an ER nurse. She knows her stuff and has a big heart, but she has no clue what is going on in this department. This is what happens when people get promoted because they have good technical skills but no leadership skills or experience. She said that I was partly to blame for this because I was not here to train you all. News flash, we never had a training planned for you four. Lynn said for what we were paying Baxter to have you here, you four should probably train our staff. About that time, Lynn showed up and after we told her what had happened, she started in on Olivia and those two went 'round and 'round over each other's decision making and who was to blame. It wasn't me so I just left…maybe I should just leave too*."

On her lunch break, Cheryl came over to Janice and sat down. "*I am so sorry about emptying out on you earlier. I am just so worn down these days. Young nurses like you are just not staying in the field as long as my generation has—you all have so many more opportunities to travel like you are doing or to go work at a flashy clinic or in private care. We just do not have those opportunities at our ages. I love nursing and love training the new nurses, but I just feel stuck in a rut. I do not*

like coming to work as much as I used to and my frustration has really affected my homelife. Even my first marriage broke up because I was either working 16 hours days or when I got home I could not turn off the stress." "*Have you tried looking for something else? I mean, surely with your skills there are other opportunities.*" Janice offered politely.

"*Sure I have thought about some things but with kids still at home, I cannot travel like you do and besides, Little Rock is home and Shepherd's Grace is the only hospital I have ever known. I did apply for the Director of Nursing Services position, but they chose Olivia…Olivia who had worked in two departments in the hospital. Olivia the shining star of the high-profile cases. Olivia who has never supervised anyone a day in her life but was sure there when the Lt. Governor had his heart attack. She is just in over her head and it has really made me look at my job as just a way to pay the bills rather than loving it the way I use to. Oh, but there I did it again and emptied my mind on your salad. I hope you will let me make it up to you on a better day!*" Janice thought to herself that there seemed to be a lot of these retribution acts coming her way.

Cheryl's retribution to Janice would come quicker than either expected. That afternoon, three patients were brought into the ER, two from a car accident and one from a heart attack. On duty in the ER were Janice, Grant, one nurse just arriving for her shift, and two preparing to leave. The sixth scheduled nurse had called in sick and thus Cheryl was running back and forth from meetings to the ER. Trying to keep the ER as calm as possible, Cheryl had designated Janice to the cardiac patient and the rest to the accident victims. Janice rushed with the patient into the treatment room and immediately worked to set up the imaging equipment needed to administer the cardiac catherization, a procedure she had done many times. This time however she was stumped as she did not find the standard flat panel imaging machine but rather a flat panel which was labeled "rotational angiography." After fumbling with the equipment for what seemed an eternity, in reality only a few seconds, Janice asked the orderly to find Cheryl. Moments later, Cheryl appeared and asked what was wrong. "*I have never seen this before…I have only used an Image Intensifier.*"

Cheryl was flooded with both panic and regret. As she jumped in to put the rotational angiograph in place, she was overwhelmed with the knowledge that the strange and new equipment had only been at Shepherd's Grace for a few weeks. While a few nurses had seen it, Cheryl had not trained anyone on how to use it. In fact, she barely knew how to us it herself. As the doctor arrived, he barked "*Why is this patient still being processed? He came in 10 minutes ago!*" "*We had some trouble with the nurse not knowing how the equipment worked.*" Cheryl proffered quickly with a glance at Janice that was both pleading for and demanding a confirmatory response. Janice simply said nothing.

With the excitement over, Janice went to Olivia. "*That man could have died because Cheryl did not train me on how to use the equipment. Olivia, you are a nurse too, you know how much equipment is out there. It is ridiculous to expect us to know everything. At every other hospital I have been at we received days of training on the equipment in that hospital and we knew how to use it before we had to use it. You all expect us to provide better care than your own nurses do but have given us no way to do it. You did not even provide an orientation at all! Maybe Robert had the right idea.*"

CONCLUSION

There is an apparent rift among the management and employees at Shepherd's Grace Hospital, with multiple mistakes coming from all angles. HR has made an affirmative choice to value time and money over individual development while also underestimating the tension bringing traveling nurses into the ER environment would create, in particular as it relates to the stress the permanent staff had felt for a long period of time. The hospital management also made an employment decision regarding the Director of Nursing Services position which seemed to include unnecessary qualifications and influences while ignoring some of the bonified job qualifications needed. Because of the struggles between the Director of Nursing Services and the Director of Human Resources, not only did the traveling nurses find themselves lacking the necessary orientation and training to be successful in their jobs but the hospital as a whole appears to not only be a hostile work environment but one that places its patients at risk due to the conflicts among the employees.

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KEY TERMS AND DEFINITIONS

Contingent Worker: Highly qualified, non-permanent member of the workforce who is hired to complete specific tasks under a statement of work order. Contingent workers are sometimes called freelancer, independent contractors, consultants, or outsourced team members. The meaning of contingent work as evolved from being one who is simply hired for a specific short term or unskilled task.

Critical Human Resource Theory: Theory which promotes structural changes within organizations as to challenge the relationships of power in an effort to bring pluralism, empowerment, and equity.

Functional Structure: A type of organizational structure which organizes departments around a specific function or area of expertise. This type of structure is characterized by clear lines of reporting and authority and creates challenges when trying to integrate work with other departments.

Organizational Commitment Theory: Theory which explores the manner in which an individual or collection of individuals identify with the goals of an organization along with the manner in which these constituents hold loyalty toward the organization.

Place Attachment Theory: Theory addressing the long-term bond one has with a particular area along with the meanings attached to that bond.

Psychological Capital Theory: Theory focusing on the positive psychological state and development of an individual, including elements of self-efficacy, confidence, optimism, perseverance, and resilience.

Social Exchange Theory: Theory which concerns the interaction between two interested parties working together to achieve a goal they could not achieve separately, through a series of actions which generate obligations, both tangible and intangible.

Temp Agency: Organizations which specialize in finding positions for those looking for a temporary work arrangement who also work with other organizations to fill temporary employment vacancies.

Traveling Nurse: A travel nurse is a fully qualified and credentialed registered nurse who is hired by a hospital or clinic on a contract basis to fill staffing needs.

Work-Life Balance Theory: Theory which explores the balance between the work and non-work aspects of an individual's life, usually in which one side (typically work) needs to be restricted in order to have more time for the other (typically life).

Chapter 7
The Outsourcing Dilemma of SMEs:
A Case of Five Latvian Tech Firms

Dāvis Auškāps
Stockholm School of Economics in Riga, Latvia

Dans Rozentāls
Stockholm School of Economics in Riga, Latvia

Dmitrijs Kravčenko
Stockholm School of Economics in Riga, Latvia

EXECUTIVE SUMMARY

It is far from uncommon for entrepreneurial SMEs to rely on outsourced labor, especially in knowledge-intensive industries. There is a plethora of benefits to doing so – quick and cost-effective access to highly skilled, self-motivated workers is certainly appealing, especially for resource-limited enterprises. That being said, outsourcing may also raise a range of issues, including loss of control, limited retention of knowledge, and communication challenges, as well as to exert unsustainable levels of pressure on a typically weak or non-existent HRM function of such organizations. This case study considers the case of five small Latvian tech firms and their relationships with outsourcing work to freelancers. The authors raise questions about the feasibility of effective HRM practices and potential for meaningful business growth, and observe how SMEs mediate their inherently precarious relationships with freelancers by bringing desired individuals into the orbit of the organization through relationship-building.

CASE STUDY BACKGROUND

In Latvia, Small and Medium Enterprises (SMEs) are the driving force behind non-financial sectors of the economy - they comprise 95% of all registered businesses, account for 70% of the total added value to the GDP, as well as provide 79% of total employment (SBA Factsheet 2018). Furthermore, according to the recent report from the Latvian Ministry of Economics (2019), 64% of new SMEs in Latvia can be considered as technologically-oriented enterprises. The technological nature of these startups is of some interest to scholars, practitioners and policy makers concerned with questions of Human Resources Management (HRM). This is primarily because digital technologies that such firms engage with, or, more precisely, the application of digitized data and digitalized processes that they build their business models around, enables SMEs to pursue new opportunities where previously there were none (Autio et al., 2018; Ranft, O'Reilly and Neufeind, 2018; Ansong and Boateng, 2019; Matzler, Veider and Kathan, 2015; Ludivine, 2017; Wood, Graham, Lehdonvirta and Hjorth, 2019); or where the barriers to entry were virtually insurmountable for SMEs (McAfee and Brynjolfsson, 2008). However, rapid proliferation of digital technologies is not only impacting the kinds of business opportunities that SMEs are able pursue, but also the way in which they manage their resources, including the human resources.

Digital technologies notwithstanding, the debate on whether formal HRM in SMEs is of benefit or detriment to such firms was far from settled even before the advent of the so-called Fourth Industrial Revolution (Schwab, 2017). In their work on the relationship between workforce skillset and adoption of HRM practices in SMEs, Bacon and Hoque (2005) highlighted this problem and suggested that SMEs with a higher proportion of low-skilled workers were less likely to adopt HRM practices than SMEs with a higher proportion of high-skilled workers. Indeed, the notion that SMEs which rely on higher skilled labor would be more inclined to manage and develop that labor has been also echoed by Heneman et al. (2000), Andrews and Welbourne (2000), and Mayson and Barrett (2006) among others. Arguments such as these are in line with the resource-based view of HRM, where the purpose of HRM is to support and develop the human resources of the organization for the sake of achieving competitive advantage (see Barney, 1991; Dessler, 2016). To momentarily digress, it should be noted that an alternative to the resource-based view of HRM is the commitment-based view (Boxall, 1993), which conceives of HRM as a type of employee-centric management practice and which had also seen more than its fair share of criticism both on account of its foundational assumptions (e.g. Grey, 2008; Grey and Willmott, 2005) and of its practical efficacy (e.g. Wright et al., 2005). Still, the ontological focus of this case study will be on the resource-based view of HRM.

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Thus, with extant literature providing consistent and convincing arguments that higher-skilled SMEs are, and ought to be, pursuing more formalized HRM practices, the question of what happens when SMEs that rely on higher skilled labor cannot afford to retain said labor as permanent employees and must rely on freelancers instead, becomes highly problematic for current ways of thinking about these issues. Do such SMEs, following numerous observations made in the literature, invest in formal (or in more formal) HRM functions and capabilities or not; or do they find other ways to manage their core, yet also outsourced, employees?

This case study is about five Latvian high-skilled SMEs operating in the technology sector which have attempted to grow yet were met with several strategic and HRM challenges including: understaffing, lack of financial resource, underdeveloped organizational capabilities, and a limited pool of qualified employees.

SETTING THE STAGE

There are three distinct factors which, if concurrently present, coalesce into a dilemma exemplified by this case study. First, SMEs with higher-skilled workforce have been shown to benefit from investing into the development of their workforce and the HRM functions that support that workforce (e.g. Heilmann et al., 2020). Second, there is a chronic shortage of skilled workers for SMEs operating in the technology sector in Latvia to employ (EURES, 2020), and, Third, due to a limited pool of labor and inherently scarce resources, Latvian SMEs operating in the technology sector turn to outsourcing to fill missing capabilities and skill gaps.

Outsourcing may, at first glance, present itself as a convenient solution to the problem of labor and resource shortage in SMEs with limited resources. Outsourcing refers to the externalization of tasks or sub-tasks (Kumar and Eickhoff, 2005; Davis and Davis, 2012) through crowd sourcing (Nakatsu et al., 2014), elancing (Aguinis and Lawal, 2013), independent contracting (Kuhn and Maleki, 2017), work on demand via apps (Aloisi, 2016), and interim/freelance project work (Keegan et al., 2018). While the use of outsourcing (and freelancing) is not a new phenomenon, the systematic application of outsourcing as a permanent mode of employment, especially when also mediated by quantitative profiling and matching algorithms (Faraj, Pachidi and Sayegh, 2018), is something that organizations had only recently begun to pursue as a resource-effective means of achieving competitive advantage.

Outsourcing has, however, also been shown to significantly impair long-term growth and development of organizations (Bettis et al., 1992; Kimura, 2002), especially when decoupled from the development of managerial functions, including HRM (Lacity and Willcocks, 2001; Sandhu et al., 2018). From an employee perspective, arguments that a shrinking and over-extended work force could find respite in flexible

employment arrangements which may allow individuals to utilize their time and skills in more strategic ways have also been advanced (Kalleberg, 2011; Agrawal and Lenka, 2015; Hall and Krueger, 2018).

In certain cases, extensive employer demand for outsourced work, coupled with loose regulatory environments, can expose individuals to greater precarity and few, or none, of the purported benefits of flexible work (Morel, 2015; Wood et al., 2019). For freelancers, this translates into three vulnerabilities. First, while freelancers do have more autonomy by being able to take on several projects from different employers at the same time (Storey, Salamn, and Platman, 2005), this ability is very much contingent on their ability to leverage social capital (networks and relationships) to receive more employment opportunities (Van den Born and Witteloostuijn, 2013). Second, freelancers do not typically receive standard employee benefits that full-time employees are entitled to; they also are often isolated from the organizational culture and, thus, have very different overall experience of work, reward and appraisal (Boyce et al., 2007; Dahling et. al., 2013). Third, compared to regular full-time employment, freelancers incur a greater share of environmental economic risk - changes in demand for their services due to business cycle fluctuations will have a disproportionately hard impact on freelancers (Evans et al., 2004; Storey et al., 2005).

For SMEs, outsourcing work is not without difficulty either - as Smogavec and Peljhan (2016) show, SMEs often experience loss of control over outsourced tasks. Communication with, and information about the freelancer is another source of risk and uncertainty. Wu and Zmud (2010) mention further challenges of retaining knowledge generated by freelancers, sharing knowledge between internal and external workers, and the need for freelance workers to learn about internal systems and standard operating procedures. To be sure, such issues are not unique to outsourced work or even to smaller organizations, and they would traditionally be addressed by an in-house HRM function. SMEs, however, can seldom afford an expensive, strategic capability that is HR, and so most HRM work simply becomes absorbed into the generalist managerial function. Indeed, Ram et al. (2001: 846) argue that employment relations in SMEs are based on the 'unwritten customs and the tacit understandings that arise out of the interaction of the parties at work' (also Adrichvili et al., 1998; Markman and Baron, 2002).

HRM is an important part of the equation here because no organization, however digitized, 'flat', or innovative, is exempt from having to engage in at least the most basic of HRM practices such as recruitment, selection and retention, contract administration, training and development, among others (Finegold and Frenkel, 2006; Dessler, 2016). This seems to hold especially true for SMEs and startups (Bendickson et al., 2017). As was introduced above, the resource-based view of HRM perceives employees as vital resources to be developed for competitive advantage. This is especially significant for organizations which depend on high-skilled, difficult-to-

replace employees, such as the five startups presented in this case study. To better understand how HRM can help enhance human resources as per the resource-based view, it is helpful to turn to the work of DeCenzo and Robbins (2009) on essential HRM functions. The four functions they identified are:

- **The staffing function** refers to labor planning, recruitment, and selection. These are considered as actions and activities to identify and evaluate the best candidate for a position's requirements. SMEs generally aim to recruit suitably qualified people at a minimal cost, so outsourced professionals are especially sought after because they are expected to be knowledgeable in their subject area, but also to require close to no training in order to be effective (Fuller-Love, 2006). Furthermore, the hiring practices in SMEs might be informal as founders take on multiple roles and have limited resources and time (Heneman and Berkeley, 1999; Dada and Fogg, 2016). Accurately identifying and articulating the requirements for specific skills, capabilities, and knowledge that the organization needs is considered to be essential for ensuring any degree of longevity or success (DeCenzo and Robbins, 2009).
- **The training and development function** refers to employee orientation, training and career development (DeCenzo and Robbins, 2009). Extant literature suggests that, unlike resident employees, freelance workers typically develop their skills in isolation from organizational goals and strategy, which affects their suitability for more complex, specific work (Fuller-Love, 2006). Low availability of specialized workers is a significant hampering factor for organizational growth and development (Ardichvili et al., 1998).
- **The motivation function** refers to specific job designs, performance appraisals, compensation, and rewards structures (DeCenzo and Robbins, 2009). Cardon (2003) observed that, when it comes to freelance workers, motivation is not usually related to the success of the organization but rather to the opportunity for skill development that a given project affords. Gallo (2015) added that performance management of freelancers is not the same as that of regular employees, the key difference being a lack of formal authority and job benefits. Key features of freelancer performance management system are: acknowledgement of the freelancers' interests, alignment of expectations by communicating the outcomes and the context of their work, attempts to create a personal relationship, integration with the team, avoidance of micromanagement, provision of continuous feedback, and adequate rate of pay (Pfeffer, 1998; Pink, 2001, 2009). The main goal of the motivation function is to nurture a productive, skilled workforce that is ready to react to the needs of the organization.

- **The maintenance function** refers to retaining talent. As Frederick Herzberg demonstrated back in 1966, the quality of the work environment strongly affects commitment of employees. DeCenzo and Robbins (2009) echo this in suggesting that by providing a safe and nourishing work environment that supports employee well-being, SMEs can reduce employee turnover and secure continuous growth and organizational development (De Winne and Sels, 2010). Improper maintenance of outsourced employees may lead to poor service quality and stagnated flow of information (Smogavec and Peljhan, 2016). Finegold and Fenkel (2006) add that proper maintenance requires employees to improve their interdisciplinary knowledge base so as to successfully cooperate with other specialists, but Neeley (2015) notes that physical and social distance can have a significantly adverse effect for those affected.

The cases of five technological SMEs will now be considered through the lens of these four functions.

CASE DESCRIPTION

In order to gain insight into the predicament faced by tech SMEs in Latvia, the authors embarked on an interview-based qualitative study broadly following the four HRM functions outlined above (see Figure 1 for complete summary). A series of semi-structured interviews with executive managers/directors, relevant line managers, and freelancers was conducted throughout 2019. Analysis followed the Gioia methodology (Gioia et al., 2013), which is an analytical system closely related to the grounded theory approach. This case study will focus on the challenges faced by five SMEs: Oversly, Castprint, Tapbox, Exonicus and Alpha Visum. These five SMEs were selected for this case study using the following criteria:

- The outsourced party of the SME must be a freelancer of professional services
- The SME must have had at least one case of strategic outsourcing
- The SME must be older than one year and have less than 50 employees

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Figure 1.
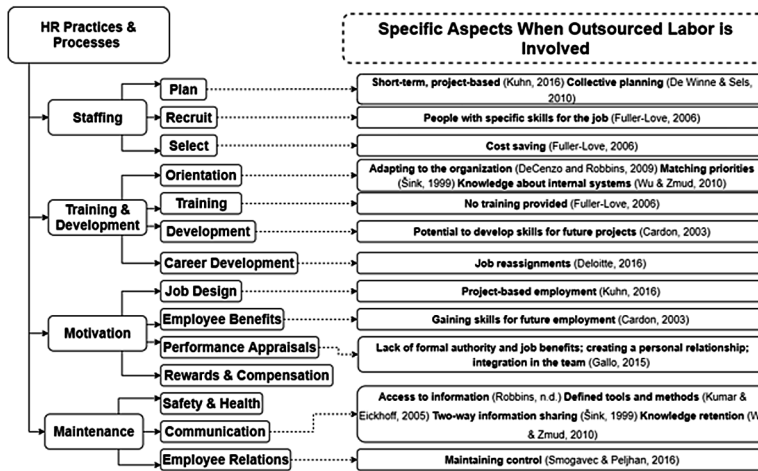
Overly was founded in 2014 with a vision to become a global augmented reality (AR) service provider. The firm creates bespoke solutions for international clients. It has become a leader within the AR/VR community in the Baltics by organizing hackathons and cross-industry conferences. Their products can be found in personal recreation, education, commercial and corporate events markets. At the time of writing, Overly were in the final development stage of the 'Overly AR platform' - a web-based application that allows users to build augmented reality content without the need for programming skills. The firm is run by its two founders, who hold the positions of CEO and CTO respectively. During its lifespan, Overly had engaged with outsourced labor on more than a hundred different projects. Interestingly, they even maintain a pool of at least three available specialists in all required areas of expertise to hire on demand. Some of the relevant specialisms they need, but do not have in-house, include software engineers, 3D animators and other creative artists.

Castprint is an organization that services medical institutions to help improve the quality of treatment for patients with fractured bones. They do so by manufacturing 3D-printed, bespoke casts in ways that are accessible, affordable and convenient. Castprint invests heavily in product development, existing market expansion and diversification into new segments, including veterinary care. It is run by two majority shareholders: the founder and CFO, and the co-founder and COO. In 2019, Castprint expanded its operations into the UK. At the time of writing, the firm was in its third year of operations and has had three engagements with freelancers, all of whom were students from various Universities in Latvia.

Tapbox manufactures self-service stations that are meant to improve user engagement for their clients. The firm was established in 2015 by two co-founders

intent on exploiting a gap in the market that they perceived – there was no other company that provided both software and hardware solutions for the self-service stations back then. At the time of writing, the firm had already installed more than 250 self-service terminals with 17 integrations across 4 different countries. Their core markets include self-service kiosks for ticketing, gambling, catering, and hotel receptions, among others. Interestingly, Tapbox started out with a small team that did not have all the competencies required for the development of their business. To solve these inherent expertise and capacity issues, they relied heavily on working with freelancers in areas such as UX design, web development and software engineers.

Exonicus produces virtual reality simulators for trauma management training. The firm is owned by two shareholders, who are the CEO and the CTO of the company. Their team works to make trauma management simulators accessible to medical training centers and hospitals worldwide. The primary product - the Trauma Simulator, is also used by the U.S. military and offers various emergency response scenarios with adjustable levels of difficulty. Exonicus raised their initial capital through Kickstarter crowdfunding, angel and accelerator investments, as well as through innovation grants. At the time of writing, Exonicus had already engaged in approximately thirty instances of working with freelancers from such diverse areas as software development, legal, sales, design, and marketing.

Finally, **Alpha Visum** is a financial technology SME that creates API (Application Programming Interface) indexing of time series data to improve predictive models in economics, finance and business operations. The firm was founded by two business partners in 2017 with the aim to use machine learning and time series indexing to improve pattern and anomaly detection within large datasets. Its product development and business operations were bootstrap financed, with the use of personal resources and non-equity financing from Latvian Investment and Development Agency. At the time of writing, they were in the final stages of product development but were yet to launch into the market. Alpha Visum has had to engage with outsourced workers for design, software development and the creation of algorithms underlying the time series indexing technology on multiple occasions.

Table 1.

Case	Maturity (yrs)	Turnover (2018)	Number of employees	Activity	Outsourcing
Overly	7	$ 349 k	10	Operates internationally; provides custom AR solutions and animations	Strategic outsourcing; more than 100 projects; daily cooperation with freelancers. Outsourcing of creative specialists (animators, designers).
Tapbox	6	$ 281 k	8	Operates internationally; provides self-service terminals and solutions	Strategic outsourcing; continuous cooperation with local freelancers (UX designers; webpage developers; software engineers).
Castprint	4	$ 19.5 k	6	Operates internationally; produces 3D-printed custom casts for fracture treatment	Strategic outsourcing; cooperation with 3 local freelancers (3D designers).
Exonicus	3	$ 340 k	2	Operates internationally; produces VR medical treatment technology	Strategic outsourcing; 30 experiences working with sales, accounting, legal, product and design development freelancers.
Alpha Visum	4	$ 27.9 k	0	Operates internationally; creates API indexing of time series data	Strategic outsourcing; 3 experiences of working with foreign freelancers hired through upwork.com and work.ua (mathematician, software engineer and designer).

THE OUTSOURCING/DEVELOPMENT DILEMMA OF SMEs

As mentioned previously, mainstream view of freelance/outsourced work in the literature is one of distinction and separation – it is generally thought that organizations resort to outsourcing in order to fill particular expertise gaps or to increase capacity on demand (Sandhu et al., 2018). Freelancers are found, contracted, supervised in so far as possible, and then let go of (Kuhn, 2016; Evans et al., 2004). But does

outsourcing actually benefit organizational growth and development and to what extent are freelancers managed with limited or non-existent HRM? The following sections contain a detailed description of case observations following the HRM functions presented in Figure 1.

Staffing

All interviewed start-up founders expressed a somewhat similar view when discussing the workflow and the growth of their respective organizations - lack of specific skills and competencies among full-time employees urged them to look for what was missing outside of their firms. Although hiring full-time employees would always be an option, the lack of necessary resources would usually compel them to employ freelancers instead. Overly, for example, went so far as to build and maintain a pool of freelancers that they could turn to on demand. For Overly, the projects arise repeatedly but not regularly, which means that the company cannot provide a full-time employee with enough workload to justify the investment – the authors were told that it would not make sense to keep an employee occupying desk space in the office with no active projects for them to work on. Similarly, the Co-founder of Tapbox reported that they outsourced when '*there are simply not enough tasks to hire a full-time employee*'. Other managers consistently echoed this same view. The Co-founder of Tapbox further explained that '*it's easier to scale them* [the outsourced labor] *down in terms of responsibilities*'. Alpha Visum offered an interesting perspective as a startup with no revenue or, indeed, a product – hiring full-time employees was simply not possible for them. From a legal standpoint, Alpha Visum has zero employees and they outsource IT specialists and mathematicians to grow the business; all other work is to be performed by both founders.

One of the most frequently cited advantages of outsourcing freelance labor is that the entire world becomes the labor pool rendering geography largely irrelevant (Hameri and Tunkelo, 2009). This, however, did not appear to be the preferred option for the five SMEs the senior managers of which consistently expressed strong preference for local, over global, freelancers. For example, the CEO of Overly noted that '*working with people hired from platforms is tricky as we have found that the culture of particular countries does not match ours for a successful relationship.*' Managers of Tapbox and Alpha Visum shared very similar comments, adding that the main disadvantage of tapping global freelancer pools was navigating between the different time zones. The risk of not being able to rapidly communicate with foreign freelancers and the potential for misalignments with, or the dilution of, the startup culture was another major concern.

Another major drawback of using outsourced labor was an inconsistent quality of work. Most company representatives acknowledged that they were often left with

no choice but to accept poor quality work when faced with imminent deadlines for deliverables. While all of the senior managers interviewed by the authors acknowledged that the right mitigation strategy was to contract multiple freelancers, the reality was that only a limited number of experts with requisite skills was ever available on the market. As a result, the five SMEs developed individual preferences towards specific freelancers. As the Co-founder of Tapbox explains, there are cases when projects appear unexpectedly and the firms needs results quickly:

After calling up a guy and seeing that he is not available, we call the next. In such cases, we may choose to have a worse quality to reach the appropriate deadline. There are cases when the freelancer that we have had in mind is not available. This is quite logical as the specialists we look to provide quality work and are highly demanded.

For Overly, who engage with freelancers regularly, uncertain availability of labor had to be built into the managerial structure:

It didn't go smoothly from the beginning, but we adjusted our management process […] You can't have just one as you don't know his workload. If suddenly they run into problems or miss deadlines, the other two can be brought in for help.

To be sure, it was not only the availability of suitable specialists that affected decisions of where to look and who to look for, but also the financial resources required to hire someone, even if for a short period of time. One of the founders of Alpha Visum, for example, mentioned that they were predisposed to hiring IT specialists from Canada or other parts of North America, but their budgets would not allow for it. Overly, Castprint and Tapbox indicated the willingness to search for independent contractors who, ideally, would be willing to do return work. Senior managers of Castprint and Tapbox even suggested that, in the best-case scenario, successful freelancers would eventually join full-time. The only things that usually prevented this from happening were the insufficient 'work capacity' and 'limited budgets'. Indeed, when the work capacity and budget would permit, some freelancers would be offered full-time positions – a case in point is the 3D designer from Castprint who began working for the firm as a freelancer but later became one of the shareholders, and now considered himself to be on par with the co-founders. Overall, it was very clear that the SMEs in this case study did not necessarily relish the episodic nature of freelance work and were overwhelmingly keen on building long-term relations even if, as expressed by one of the senior managers of Castprint, some reservations about trusting temporary workers would always remain:

The freelancer is easier to get rid of. But… when the expectations are exceeded, and there is a really good personal fit… and that person is really engaged… and he or she wants stability, which the employment could provide, then there is an onboarding process… but it's an open-ended question. I still keep the liberty to decide on my end… rather than falling into an unhealthy relationship.

Short of that, when appropriate specialists were identified and the final decision to hire them was made, the firms would often choose to rely on legal agreements, not interpersonal relations, to govern the outsourcing engagement. When a company decides to use online platforms such as UpWork, for example, the agreement is offered by the platform and all disputes are resolved through it as well. In other cases, non-disclosure agreements and employment contracts are used to protect both parties. Castprint uses a project termination contract to ensure that the work created for them, and everything created under the supervision of Castprint, remains the intellectual property of Castpring. Despite this, the CEO of Castprint still betrayed a certain aversion to investing too much time and effort into formalizing relationships with freelancers: '[we] *prefer to spend more time on crucial tasks such as talking to clients rather than establishing legal guidelines*.' In cases when a freelancer was someone that the firm was familiar with, and had worked with before, a simple verbal agreement was often deemed to suffice.

Training and Development

Once suitable freelancers were found, and the agreements between them and the organizations were in effect, SMEs would face the difficulty of actually managing the freelancers. It is usually difficult for any new full-time employee to perform at their best before having had the time to adapt to their new organization first, least so for outsourced labor. Orientation and training are time-consuming processes that, in larger organizations, are performed by a specialist HRM department. Fast-growing technological firms presented in this case study generally lacked any formal HRM function, so they did what they could with what they had. Orientation would normally be offered to new freelancers, and all interviewees stated that it was crucial to provide explicit and thorough task descriptions. The CEO of Castprint described acquainting new freelancers to the organization by means of a 'trial' task:

The process starts by asking the available guys if they want to do a certain project. Sometimes a bit of persuasion is necessary. Afterwards, we have to find out their knowledge background and what they are capable of. At times, we send them a small introductory task to see how they perform.

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Beyond orientation, senior managers from all SMEs, with the exception of Castprint, considered it unnecessary to share the firm's strategic vision with freelancers unless it was perceived as relevant to the maintenance of long-term relationships, or essential to the execution of contracted work. Freelancers working for Overly reported that it was helpful to learn about the mission, vision, and values of the firm although they did not consider it essential for a fruitful collaboration. After all, '*you might only have a few projects with the given company, so it is not of key importance*'. This general sentiment was also echoed by one of the senior executives at Overly:

To really penetrate the mission, vision, and everything else… it is a long process. I do not want to invest my time, energy, and nerves to like... to deal with a stranger that is coming and going.

By contrast, the CEO of Castprint explained that giving clear directions and explaining how outsourced tasks fit with the overall strategy was key for avoiding potential issues with communication and with common understandings. One of the freelancers working for Overly concurred that '*everything that a freelancer needs is a good brief, so you don't run into problems of what to do and how to do it. The brief is like a bible that guides you and that you can hold onto*'. What constituted a 'good brief' would vary between individuals and organizations, and would also be subject to any history of prior work. For some, like the 3D design specialist working for Castprint, '*it is great when the management team comes to you with a specific challenge*', whereas for others, like the creative content specialist working for Overly, there could be '*nothing worse than a client that does not know what they need*'. Irrespective of the degree to which different SMEs felt it appropriate to introduce new freelancers to the organization, all five did agree that a better outsourcing experience was to be had with freelancers who already had prior familiarity with their organizations.

In terms of training and career development, interviews revealed a common sentiment that freelancers were hired for a single purpose - to complete specific tasks in return for a certain amount of pay. One of the core benefits of outsourcing work to freelancers is their existing expertise and experience. Overly's CEO was adamant that:

The aim is to find people that they do not have to spend a lot of time on [training and coaching]. That's why we have three people ready for each position as they know how to create the content according to our standards. Our knowledge and expertise lie in building technical solutions. That's why we need experienced creative people

that know what they are doing. Training technical specialists takes a lot of time to reach the level of him being able to work autonomously.

Similarly, one of Overly's project managers ascertained that *'that is the whole point of employing freelancers - we expect them to already be knowledgeable. Otherwise, the interaction would not be efficient'.* Another one of interviewed senior executives offered an even stronger opinion, insisting that '*outsourced people are not coachable, there are no long-term goals being set, and the focus of their work is on the short-term project at hand. […] We are not concerned with their personal development'.* Founders of Tapbox, Exonicus, and Alpha Visum shared a common view that it is more important to select the right applicants at the beginning of the working relationship, knowing what they are capable of and what the requirements for the job are, rather than contracting people to do a job for which they lack the necessary skills.

Interviewed freelancers from all five SMEs looked at this differently and did emphasize the importance of training. Event organizer working for Overly stated that no specific training programs were provided to him, but that he did have the opportunity to learn about technologies used on specific projects; and a 3D designer mentioned his willingness to document his work so as to improve the orientation process for other newcomers. Others expressed appreciation for the ability to learn from specific projects that they were part of. Fundamentally, however, as the 3D design specialist working for Castprint articulated:

What's the end goal for a freelancer? It sure does sound sexy on paper. I view it as a means of getting somewhere else. You have to understand what and where you want to be. I definitely don't take on every project that comes my way.

When it comes to training and development, there appears to be a significant misalignment between SMEs and freelancers with respect to goals and expectations. On the one hand, senior executives of the five SMEs in this case study were unanimous that freelancers not only require no training, but also that training a freelancer would amount to a waste of resources. Freelancers, on the other hand, were motivated to learn and to develop their general or technical skills. One aspect of this was, to be sure, driven by the need to increase competitiveness through skills and experiences, but there was also a consistently reported interest to secure future work with the same organizations – which is, coincidentally, something that the 'Staffing' section above also shows senior managers to be very interested in.

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Motivation

With respect to motivation, a recurrent theme for both the representatives of the five SMEs presented here and their freelancers alike, was the importance of a well-designed job. The CEO of Castprint explained, '*the biggest issue, that might be more frequent for smaller start-ups, is not acknowledging the difference between managing a full-time employee* [and a freelancer]. *Freelancers have multiple projects at once and have limited time*'. Because of this, the prevailing sentiment among all five SMEs was that freelancers were supposed to be self-motivated. Overwhelming majority of interviewed managers affirmed that freelancing was a short-term contractual agreement and that the main motivator was financial (with most SMEs offering hourly rates of pay). According to one of the senior managers, '*freelancers are supposed to motivate themselves. The only thing we provide is the task that is supposed to be done.*' Another senior manager added that '*their work is project-based and they do not care about development opportunities. All they care about is a clear definition of tasks and the pay.*'

Freelancers, on the other hand, emphasized that freelance work, for them, was more about growth and new challenges, rather than about pecuniary benefits alone. During the interviews, different freelancers consistently described their motivation as arising from the passion for work, opportunities for self-development, and from personal interest in the project at hand. There were also freelancers who admitted the need to be intrinsically motivated by the organizations that they were working for. This was corroborated by some of the SMEs with more experience in outsourcing. The co-founder of Tapbox, for example, mentioned that:

'*it depends on the freelancer: there are those who are motivated by receiving pay and those that are motivated by the project being interesting. For the second type, we try to give projects that are more unique*'.

The CEO of Castprint explained their approach to motivating outsourced workers in similar terms:

Money, firstly, by compensating them monetarily for the job done. It is our mantra from the first day that 'every task done must have a reward'. At the same time, we invited [the freelancer] from time to time to have a talk and drink with us. This was an initiative to create a sense of togetherness. We tried to stimulate self-motivation.

All interviewed managers acknowledged the importance of appraising the performance of freelancers as a way of maintaining motivation and engagement. Project manager at Overly, who was engaged in direct daily interactions with

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freelancers working for them, noted that '*feedback is important. I tend to say how much I like working with them. That is how I try to make the relationship long-lasting, which is important for them as well*'. The CEO of Castprint added that it was important to discuss the work along the KISS (keep-it-simple-stupid) principle, and to set clear deadlines both for deliverables and for feedback to freelancers. Performance planning sessions would mainly take the form of 'briefs', and freelancers would be continuously assessed by means of pre-scheduled quality checks. Overly would also use feedback reports to check up on performance of their freelancers. The length of each project was discussed and agreed upon, and deadlines for reporting back were then set accordingly. Overly would also often use a time-tracking tool called Timedoctor, which takes screenshots of the freelancers' desktop at set intervals of time. Overly's CEO explained that they '*don't micromanage but rather use it to adjust the work process if things are not going as planned*'. He did also note that some freelancers would, nevertheless, attempt to cheat digital tools such as Timedoctor, which is why it seemed important for SMEs to not only give feedback but also to maintain control. The CEO of Exonicus shared a similar experience:

What that Belarusian programmer did was cheap, fast, and cool… but then later, our in-house developer mentioned that there were certain mistakes and that caused a delay… and we had to clean up… and so...

I'm not a programmer or graphic designer myself… somebody else in my in-house team has that expertise, and I trust that person to monitor the outsourced party.

Beyond that, however, the work was expected to be executed with minimal feedback from the contracting organizations. There were no explicit end-of-project performance reviews in either of the case study organizations.

Maintenance

Even though the literature tends to treat freelance work as inherently short-term, one-off and *ad hoc* (e.g. Kuhn, 2016), the SMEs in this case study would often re-engage with the same freelancers over extended periods of time. For freelancers, this was also the preferred way of working - one individual working with Overly had been freelancing with them between 6-7 years. Despite such length of continued engagements, but similar to other freelancers interviewed by the authors, this person admitted that he did not consider himself to be a part of the Overly team. The feelings of belonging, loyalty, and commitment are all aspects that DeCenzo and Robbins (2009) emphasize as key to the success of employment relationships. In fact, both the freelancers and the project managers agreed that a good relationship

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does encourage them to continue re-engaging on future projects. In the words of Overly's CEO, *'if you choose the right freelancers, it can be even more comfortable than having someone around the office all the time'.*

Information sharing and being part of the communications chain were valued highly by both the freelancers and the SMEs as ways of maintaining a productive relationship. Co-founder of Tapbox explained that when a freelancer has continuous interaction with full-time employees, they become a 'link in the chain', even to the point where '*if he's part of the team, then he will take part in the team meetings*'. Tapbox, as well as Overly, encouraged freelancers to attend team meetings and, especially, client meetings. While some freelancers appreciated and made use of the opportunity, others would rarely take part in team meetings and would discuss any questions in 1-on-1 sessions with their line managers. The CEO of Castprint admitted that team meetings are just not a priority for freelancers as they may have multiple projects that may be running concurrently.

Alignment of expectations was considered to be as important as communication. In addition to clearly defining tasks and communicating the context of work, the CEO of Overly highlighted time management, scheduled communication and deadlines as important elements in building and maintaining realistic mutual expectations of the working relationship. He went on to say that they do try to discuss all relevant strengths and weaknesses of the freelancer to ensure that neither side has unrealistic expectations of final deliverables - '*There are times when we see that the freelancer does not meet our requirements. If so, we tell them right away and organize a one-to-one meeting*'. A clear definition of roles and responsibilities was also considered to be an important factor in aligning expectations, as the CEO of Tapbox explained:

Full-time employees are here regularly, and this is their main income, so we don't expect them to exceed our expectations. From freelancers, we expect even less as they only have the short-term task at hand.

By hiring a freelancer, you sort of expect that everything will be done correctly.

An important part of the maintenance function in HRM is the ability to effectively terminate unproductive relationships. In this regard, all five SMEs displayed no hesitation in terminating engagements that did not meet their expectations - '*if nothing changes, we negotiate how to end the relationship*' the CEO of Overly explained. The CEO of Exonicus shared an equally determined opinion that when after a few rounds of feedback the expected work quality would not improve, '*we just quit the relationship. That's it. Done. Bye, bye'.*

CONCLUSION

Existing literature on the resource-based view of HRM strongly suggests that SMEs with higher-skilled workforce will, and should, develop more formal and sophisticated HRM capabilities in order to continue developing the skill base of their workforce. While this seems like an intuitive proposition, the case study of five Latvian technological SMEs operating in an especially constraining commercial environment poses a few difficult questions to the 'mainstream' perspective.

First, what are SMEs to do if they cannot afford to hire or retain core high-skilled employees? Even though outsourcing work to freelancers is normally considered to be a one-off, short-term engagement, the five startups in this case study would repeatedly aim to build longer-lasting relationships with certain individuals. In more than a few ways, such freelancers would be thought of, and even treated as full-time employees would be treated. They were invited to social events, team and client meetings, and would be encouraged to attend, or even work from, the main office. Some freelancers were considered critical to core competencies of the SME but would remain external to the organization, while others would have a history of collaboration equal to the lifespan of the organization. Multiple interviewed CEO's expressed their preference for transitioning successful freelancers onto full-time positions, but it was often reported that the primary reason for not doing so was limited budgets and an insufficient volume of work. Interviewed freelancers appeared to be somewhat more pragmatic about the nature of their relationships with the SMEs. While appreciating the opportunity for repeat engagements, none reported feeling like they were part of the organization. In fact, the authors heard multiple accounts that highlighted something of a catch-22 that individuals working with the firms for prolonged periods of time faced – they were acutely aware that their chances of continued engagement were heavily contingent on developing asset-specific skills, but they were also barred by senior management from access and resources needed to develop those said skills. Furthermore, because much of outsourced work was initially advertised through informal networks, freelancers would find themselves highly dependent on specific individuals even when, formally, working for organizations.

Second, when managing outsourced labor, would SMEs still follow existing literature and invest in HRM functions? All five SMEs displayed and reported having tight surveillance and control mechanisms in place, and most admitted being rather lax at providing freelancers with constructive, structured developmental feedback upon completion of their work. Despite any history of long-term relationships, or even the consistently reported aspiration for repeat engagements, all of the interviewed CEOs and project managers shrugged away from the idea of providing freelancers with any kind of professional training and development opportunities. Similarly, the

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maintenance of working relationships with freelancers would be minimal by HRM standards, focusing almost exclusively on aligning expectations and on providing corrective feedback. Clearly, development of anything resembling 'essential' HRM functions such as those identified by DeCenzo and Robbins (2009) was not a key concern for the firms presented here. Extant literature (e.g. Lacity and Willcocks, 2001; Bacon and Hoque, 2005) might retort with an argument surveillance is a function of HRM and that such SMEs would benefit from additional functions also. However, it is difficult to justify investment in human resources management with very few full-time humans whose resources to manage.

And, finally, if the literature is still unable to demonstrate a clear positive relationship between HRM and the bottom line, is it really worth investing into human resources management at the early stages of organizational development? The drawbacks of firms not having a dedicated HRM function are usually strategic, and the challenges for SMEs in general and startups in particular tend to be more immediate. Indeed, a case can be made on the basis of Grey and Willmott (2005) that a formal HRM function in early-stage startups, such as the ones presented in this case study, would amount to little more than an indulgence of a managerial fad at best, and an expression of organizational Foucauldian-infused paranoia at worst. When considered through this lens, the experiences of five technological SMEs presented here do lend some degree of support to the latter view. In light of this, a question about whether startup employees and broader stakeholders such as freelancers would actually benefit from a formal HRM function or not (and what kind of HRM function) should be seriously considered.

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KEY TERMS AND DEFINITIONS

Employee Competencies: Firm-specific human capital attributes such as technical, behavioral, or business skills and knowledge that are crucial for firm performance. Skills, traits, attributes that employees need to effectively execute their duties/responsibilities/tasks.

Flexible Work: A work arrangement where the employee does not have to work during the traditional working hours. The employee has the ability to choose the time that they spend working.

Freelancer: An independent worker/contractor that offers their services to individual buyers without a long-term employment contract.

GDP: Gross domestic product – the total monetary or market value of all the finished goods and services produced within a country's borders in a specific time period.

HRM Capabilities: The extent of an HR function meeting the needs of its stakeholders; success in developing and maintaining HRM practices that contribute to the performance of the organization in areas such as staffing, performance management, training and development, motivation, and rewards.

Online Platform: A digital service that facilitates interactions between two or more distinct but interdependent sets of users (whether organizations or individuals) who interact through the service via the internet.

Outsourcing: Emerged as a business strategy in the 70s; a situation in which a company turns to external service providers to deliver business functions or activities that the company does not perform itself.

SMEs: In Latvia, small and medium-sized enterprises (SMEs) are classified as businesses that employ less than 250 employees and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.

Technology Start-Up: An entrepreneurial venture operating in the technology sector with the purpose of developing technology-related products or services to solve challenges faced by market participants.

Chapter 8
Skating on Thin Ice at Enti:
HRM or Employee Bullying?

Niveen Labib Eid

iD https://orcid.org/0000-0003-0284-8155
Birzeit University, Palestine

Devi Akella
Albany State University, USA

EXECUTIVE SUMMARY

This case study highlights how various human resources management (HRM) policies and practices at ENTI, a Palestinian non-governmental organization (NGO), can be deconstructed as depersonalized forms of 'workplace bullying' which exert a totalitarian form of control and domination over employees. It further examines how external sociopolitical forces at the macro level can be held responsible for management's autocratic regimes, where employees are closely monitored and psychologically controlled. In pursuit of explaining the complex dynamics of employee relations, workplace bullying, and HRM, the case utilizes an interpretative inquiry based on critical theoretical lens of Foucault's disciplinary power frameworks. HRM in rhetoric is a management responsibility which is primarily concerned with employees, their welfare, growth, and development. However, this case reveals the complete opposite, in the form of startling, critical insights from an under researched sector, that of the (NGOs) which have been historically envisaged as altruistic organizations and ideal workplaces.

ORGANIZATION BACKGROUND

Women trafficking, incest, gender bias, dehumanization, physical violence, emotional abuse, bullying, and domestic violence are social problems which have been historically practiced against females across the world. The more these practices become publicly visible, the faster they are likely to be tackled and eradicated. However, in some conservative and masculine -oriented societies such as the Palestinian society, such phenomena are usually perceived as taboos and thus suppressed. According to the UN Special Rapporteur's report on violence against women in 2005 and 2011 this can be traced to two main reasons. First, is that Palestine has been under occupation for seventy years, and the Palestinians have been subjected to continuous abuse which has now become part of their mental psyche. Second, gender discrimination is an offshoot of the deeply rooted religious and cultural assumptions of the Palestinian patriarchal society. Therefore, the Palestinian women are forced to endure in silence rather than publicly speak against such cultural taboos.

In the past, people were less knowledgeable, courageous, and open minded to confront these issues to protect and preserve women's dignity and wellbeing. However, over the last few decades, the Palestinian community, along with some NGOs, civil institutions and other influential human rights defenders have been working with the official designated bodies to confront this inhuman phenomenon. The sufferings and trauma suffered by the victimized Palestinian women motivated a young female social entrepreneur called Lima, to establish Enti, an NGO committed to breaking through the community's silence to raise voice against the violence practiced by a few domineering Palestinian males on their women.

Establishment of Enti

The aforementioned social issues were behind the establishment of Enti, which in Arabic language means "*yourself*" and more specifically it is the pronoun used when the subject is a female. Enti's slogan over the last thirty years has not changed: *'Seek protection for yourself and also for other females"*. This slogan has encouraged Palestinian women to disclose information about abuse and violence suffered or witnessed by them. Enti was initially established in 1990 as a social initiative, by five female social activists, inspired by Lima's ideology and passion of wanting to create better lives for the vulnerable victims of domestic violence. At that time, such an initiative was seen as a pioneering cornerstone for a continuous wave of community awakening and reform in respect to matters concerning gender equality and justice for the abused. Enti, entered into numerous partnerships with various support groups, and international human rights organizations, thereby gaining access to unlimited networks and resources. These kinds of partnerships opened

new venues as they have extended to Enti a significant amount of legitimacy as an organization aiming to attend to a critical social need.

Initially Enti lacked the support of the local Palestinian community. Enti was not recognized nor registered as an NGO. This created numerous challenges, politically, socially, and economically for the organization. For instance, Enti was unable to raise funds through donations, or hire employees and was heavily dependent on volunteers. However, Lima's determination to expand and register Enti as a local NGO, resulted in the organization finally getting registered as a Palestinian NGO in 1995. The NGO now operates under the duplicated bylaws of the two governing bodies of the Palestinian Authority and the Israeli Government, typical for Palestine, being a country under occupation. All Palestinian organizations that operate in the occupied geographic areas are subject to the occupier's authority and have to comply with the latter's legislations. Several issues emerged over Enti's lifetime due to this contradictory nature of the two governance systems. Despite these challenges, Enti became the first pioneering NGO to combat different forms of violence and abuse suffered by Palestinian females. Enti was able to garner the attention and interest of several international formal and legal bodies, including political governments in different countries. Enti received offers from international donors to expand its services to cover new geographic areas using a variety of creative programs and projects.

Enti's Mission

Since its evolution, Enti operated under the broad mission of:

"combating all forms of violence practiced against females in the Palestinian society and offer female victims with protection and preservation of life and dignity".

These few lines have inspired all volunteers and workers at Enti and influenced its programs and deliverables. Although Enti expanded its coverage to serve other vulnerable and marginalized social groups like children, Lima and her team have remained committed to Enti's mission, of serving abused women and seeking justice on their behalf—"*Enti's mission is the reason for our existence*" (Lima's words). Unlike some other NGOs, which have exploited the suffering of the victims for economic ends. Enti has remained committed to its social cause primarily due to Lima's authentic leadership. The work practices and decisions at Enti are governed by the implicitly rooted values of justice, equity, openness, and confidentiality. Consequently, Enti has been presented in a favorable fashion and has managed to gain trust and social legitimacy and create a strong presence within the Palestinian community.

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Nature of Work

The basic objective of Enti, which revolves around Combating Violence against Women (VAW) challenged the institutionalized traditions and social norms of the society, and therefore the NGO initially met with social resistance. The nature of Enti's work, involves dealing with the pain and suffering of the victims of domestic violence, requiring full dedication, complete neutrality, caution and an effective utilization of strategic techniques mainly in the form of building social capital as well as efficiently managing the stakeholders. For that reason, Enti adopted a 'growth concentration strategy' (Peters and Waterman, 1982) that went in congruence with its mission. It utilized expansion and outreach by reaching new marginalized yet under-served beneficiaries or reaching untapped geographic regions classified as 'areas of crises' like war zones. Enti was able to operate with the cooperation and the active engagement of an integrated system of various stakeholder groups who were also treated as beneficiaries in its value chain in order to deliver its services. Enti devised programs, projects, and services that focused on delivering training, and awareness campaigns for professionals like physicians, social counselors, specialists such as psychiatrists, lawyers, judges, and police officers, and finally volunteers who worked on its help lines as social counselors.

Its programs focused on women empowerment, eradication of traditional cultural taboos and values, and the protection of human rights of marginalized groups within the society. Enti offered chat and helpline services in the form of social counseling, via online, mobile and face- to face therapy sessions. It also developed awareness programs and workshops, organized campaigns, and conferences to increase societal awareness to emancipate victims of domestic violence. Enti emerged as an entrepreneurial social catalyst in the Palestinian society and received awards and recognition from several well-known local and international organizations. However, it was unable to maintain this position. War in Syria after 2009, caused political instability in the Middle East, resulting in a shift in the funding and project sponsorship opportunities within Palestine. Subsequently, several projects were ceased and shut down. However ironically, during this time, Enti decided to undertake major organizational restructuring initiatives resulting in internal strife and conflicts.

Transformations in Governance and Management Structure

During its lifetime, Enti underwent three stages of governance transitions:

Stage One (1990-1994)

First during 1990-1994, as mentioned previously, when it was not a legal NGO, but rather a form of a social initiative led by five female social entrepreneurs and therefore, operated in an informal mode.

Stage Two (1995-2006)

Later, after it was officially registered in 1995, it adopted a governance structure that was typical for all local NGOs. Standardized registration and governance procedures usually governed the work of the not-for-profit sector which also encompassed local and international NGOs. Enti's governance structure was composed of the Board of Trustees (BOT), and the General Assembly (GA). The BOT the primary governing body, was composed of credible and well-known public figures and professionals and was supported by a few advisory committees. The BOT was responsible for protecting and preserving the interests of Enti's beneficiaries. Its functions ranged from making sure that the funds were being used to help beneficiaries, to recruiting qualified senior management, and operating within the parameters of law. While the General Assembly was involved in matters such as fundraising, monitoring and evaluation, social counseling, outreach, documentation, publication, and media, project, and program management, and other technological, financial, and personnel affairs. During 1995-2006, even though the members of both the governance bodies changed, their responsibilities remained the same.

The NGO was subject to annual financial, administrative, and project-based audit from various parties as part of the NGOs governance baselines. This required Enti to assign independent financial and administrative auditors and external evaluators to review and document their findings in a formal meeting with the BOT and other donors. The audit process was further monitored and evaluated by other official bodies such as the ministries, responsible for auditing the deliverables and operations of the Palestinian NGOs. All auditing bodies had a consent on whether the NGO should continue operating or should be closed. The BOT usually assigned the executive director of the NGOs. However, Lima being the founding director, was allowed to continue in the position of the executive director of Enti. Figure (1) depicts the organization structure of Enti during the years 1995-2006.

The BOT also participated in the selection and placement of the management team. Lima and the BOT agreed to adopt a flat organizational structure for Enti, consisting of a few expert executives who enjoyed a wide span of control. They felt that the use of a flat structure would allow Enti to achieve more flexibility, less bureaucracy, with less managers and lower compensation costs. Lima was the head of the entire NGO and had two executives, the 'Administrative and Financial

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Manager', and the 'Program Manager' reporting to her. The 'Administrative and Financial Manager', was a male who had twelve administrative employees reporting to him such as accountants, fund raising officers, an administrative assistant who also worked as an HR generalist, and IT technicians plus other unskilled workers. As for the 'Program Manager', she was a specialist qualified in social therapy and counseling, with interdisciplinary experience in the fields of social counseling, program, and project management. Over fifteen employees reported to her including social counselors, project coordinators, and media professionals, see Figure (1).

At that time, Enti operated from two locations, with one office located in Jerusalem and the headquarters in Ramallah. The three executives were geographically separated, with the 'Administrative and Financial Manager' located in Jerusalem and the 'Executive Manager', and the 'Program Manager' in Ramallah. The entire executive team adopted a participatory leadership approach and developed a collegial and harmonious working environment, where all employees collaborated as one big family. The managers at Enti celebrated all personal events, were empathetic and caring, thereby creating a congenial, supportive, and stress-free workplace. They offered the employees different types of professional development opportunities, extra monetary benefits and planned social counseling sessions for them. However, after the year 2006, the governance and managerial structure at Enti experienced radical transformations.

Stage Three (2007-2020)

In 2007, Enti started facing internal challenges due to the limited access to funding, as a result of political instability and shifts in the international policy, restricting donations and budgets allocated to the NGO sector in Palestine (MAS, 2007). Adding to these problems, Enti had earlier planned internal organizational transformations and had allocated funds towards streamlining of its infrastructure as part of its strategic implementation stage. Subsequently, Enti invested heavily on technology, training, and outreach programs, causing severe funds shortage at the organizational level. Managers at Enti sought the help of professional external lawyers and consultants as they could not find quick and feasible solutions to run the organization smoothly and could not think of alternative funding sources.

Figure 1.
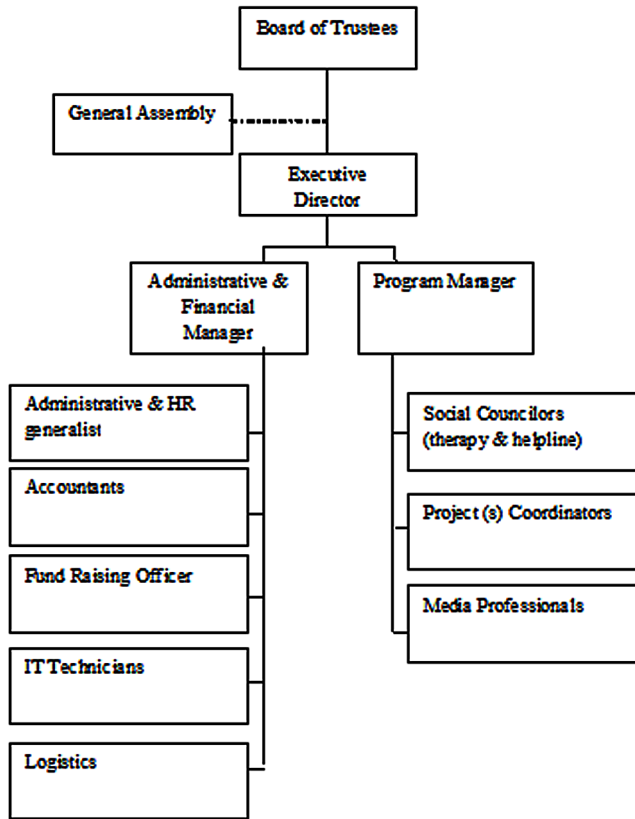
One of those professionals, Amin did a great job at that critical situation. He generated additional funds using his connections with a foreign government. Amin had a dynamic personality, and years of experience in the NGO sector, and the competence to liaison with prospective donors. He was able to utilize his extended network to serve Enti. He was perceived by the management team as an influential leader as he enjoyed good diplomatic and public relations skills. After consulting with the BOT and the two executives reporting to her, the executive manager Lima decided to hire a Vice Director (VD). Correspondingly, the management team devised a novel position of a Vice Director, with a set of responsibilities and performance standards see Figure (2). Amin competed for the position with a group of prospective professionals. Even though Enti's management had a positive impression and foreknowledge about Amin's competence, they preferred that Amin along with other candidates go through a scrutinized hiring procedure. Amin received a higher ranking being more experienced and qualified. Also, at that time, he was working

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as a freelancer and it was envisaged that he would be able to dedicate more time to the new position as compared to other candidates; resulting in him being hired as the new Vice Director of Enti. Lima thought that by hiring Amin as the Vice Director, she would be able to move Enti forward, with Amin overseeing the daily tactical operations and she in-charge of the strategic aspects of the organization. Amin was therefore granted a lot of autonomy and delegated power to represent Lima in public and undertake decisions pertaining to the day-to-day functioning of the organization. All managers and employees at Enti willingly cooperated with Amin, as they had positive expectations of him, considered him as their superhero, who would take Enti to higher levels.

However, after two years no one remained under these false delusions. They noticed that Amin reacted by exemplifying actions and behaviors that transformed Enti into a 'totalistic workplace' (Schwartz, 1987). Amin practiced an autocratic style of leadership. He managed Enti in a manner similar to a military organization. His subordinates described him as highly authoritative, repressive, who strictly followed a 'one man show' type of management. Earlier in Enti, employees felt comfortable expressing their thoughts and concerns to the management as they deemed necessary. However, after Amin took over, employees commented that a new culture emerged; where openness and debate were replaced with obedience and silence, with those who expressed their opinions being subjected to punishment or threatened with termination.

I was able to live at Enti during its most good times as well as its most terrible times ... we used to be the best workplace to work in while later I myself became burned from inside, I think the new leadership approach was just catastrophic. (Employee 7)

Some bosses think that their main role as managers is to build his/her own empire and acquaint greater power, status, and resources at the expense of the organization or its members and even at the expense of the organization's mission." (Employee 2)

The new management adopted the style of a village headman. (Employee 6)

Although the evolving leadership style had negatively influenced the intra-professional relationships at Enti, nothing was done openly. On the contrary, the control was exerted via threats of termination or by criticizing employees for not being professional. In other words, the autocratic leadership style ended up imposing totalistic control over the employees which could be interpreted as being bullied (Hoel et al., 2010; Samnani, 2019). This shows traces of depersonalized bullying (Akella, 2020; D'Cruz & Noronha, 2009) where employees are subjugated in both overt and covert fashion, through various structural and cultural mechanisms, organizational

policies, technology and leadership, all methods which resort to intimidating and harassing employees with the sole objective of realizing organizational objectives (Akella, 2020; D'Cruz & Noronha, 2009; Samnani & Singh, 2012).

Employees described themselves as being under continuous surveillance but felt it was futile complaining because Lima was completely under the influence of Amin. To further aggravate the situation, Lima asked Amin to design strategic solutions that could bring down the organization's operational expenses. Amin recommended restructuring Enti to increase its overall organizational efficiency. He suggested removal of the entire middle level managerial positions consisting of finance and program managers and adding new supervisory positions to reduce the heightened work pressure. He was supportive of the practice of 'managerialism' (Enteman,1993; Klikauer, 2015) in the NGO sector and the adoption of flatter designs to revitalize Enti's overall operations. Amin presented his new plan and supporting it with facts and figures in front of the BOT and Lima. They immediately supported his decision because it appeared to be rational and cost efficient. However, his subordinates interpreted this new plan, as a tactic to gain more control over the organization, and as a form of micro-management.

The administration defines professionalism as dictatorship. (Employee 5)

… over my lifetime at Enti, I never had the chance to report for a specialized project manager, this is because such a position was purposefully canceled, we always were forced in one way or another to report to only one supervisor who was at that time, the vice director. (Employee 2)

Figure (2) depicts the new structure with the added positions reporting to the vice director. The structure was disliked by most of the employees because they said it widened the VD' s span of control, instead of making work at the organization more flexible. They complained that Amin had devised a rigid structure that was highly centralized. Moreover, employees claimed that the new structure duplicated the operational expenses and produced more negative ramifications, such as: lower vertical and horizontal communications, role ambiguity and scope for further domination practiced by Amin as he controlled almost all of the organizational resources including information about their daily routine.

There was actually no 'financial supervisor' it was created just as a fictional position, the one who dominated and ran the financial management at Enti was the Vice Director with the support of the General Director. (Employee 3)

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Figure 2.
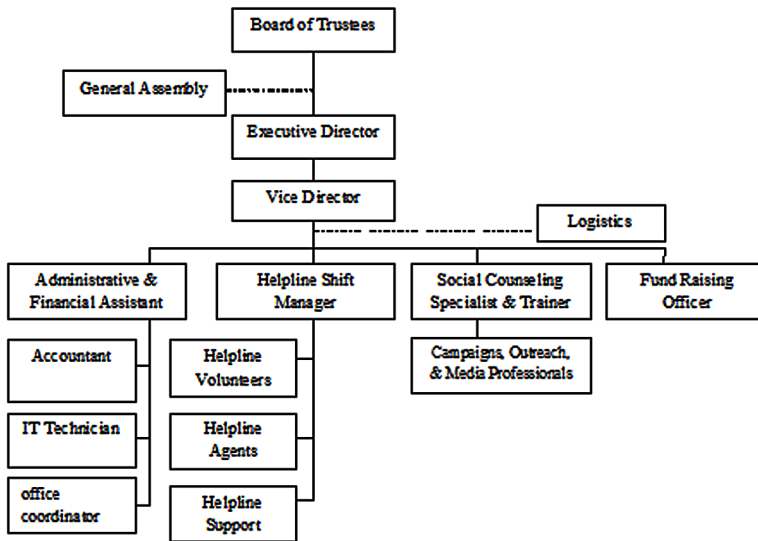
Governance and Accountability Issues

The top management of Enti consisted of the Executive Director, Lima and Vice Director, Amin. And unlike other organizations where leadership positions are subject to continuous rotation. At Enti, the top managers had not been replaced in decades. Lima had held the position of the Executive Director for Enti for over thirty years and Amin her Vice director had spent thirteen years in his position.

The main issue that should be investigated and scrutinized is the question of: 'why there is no rotation or change in persons who fill the managerial positions?. (Employee 1)

The two directors not only controlled the administrative work but other areas which normally should have been handled by specialists. In addition, these two directors were the ones who chose and appointed BOT members, who were increasingly being chosen based on their connections, and willingness to take up passive roles.

The administration occasionally isolates the BOT from participating in making key decisions, the BOT members lacked knowledge about vital aspects about the organization. This is a serious problem... the bosses are not abiding to their key accountability roles. (Employee 1)

Furthermore, strict accountability standards were imposed on the employees, lacking in transparent communication policies causing distress to the employees.

One serious administrative mistake is that the bosses set accountability and disciplinary systems in their relationship with employees, yet they disclose no accountability standards to their administrative policies, roles, and practices. (Employee 6)

These organizational transformations, to reiterate were undertaken in the midst of financial crisis, resulting in retrenchments at the divisional levels. Enti had been facing competition from other NGOs, with similar social objectives. It was also facing shortage of funding from international donors and other external sources. The two executive directors at Enti therefore decided to streamline the entire organization to increase its efficiency and overall functioning. They first downsized the organization, and next adopted strict disciplinary HR policies and practices to maximize employee productivity while saving on labor cost. These strategic decisions resulted in the closure of the Enti's office in Jerusalem and subsequent termination of employees. The Jerusalem office was closed, and all the operations were now centered at Ramallah. Given the nature of the VD's responsibilities, Amin was the forefront in defending Enti's administrative actions when employees raised complaints. Amin argued that organizational downsizing would reduce labor costs because labor was more expensive at Jerusalem. However, all employees at the Jerusalem office were dismissed with unsatisfactory severance packages. The disgruntled workers at the Jerusalem office filed legal suits against Enti. The employees complained:

I was badly treated ... my position was eliminated ...NGOs' are based on project work, so how come Enti will operate without having project managers who would oversee all projects...in fact most of the NGOs are run in a similar fashion.... most employees in this sector are abused and exploited. (Employee 2)

Subsequent incidents later revealed that divestiture of Jerusalem's office could be attributed to reasons other than cutting labor costs. The top management resided in Ramallah, it was easier for them to exercise control over the organization and employees. Moreover, labor laws in Ramallah were not well enacted as compared to the legal framework in Jerusalem, to protect the employees. NGOs in Ramallah had to adhere to a basic minimum, instead of complying with the complete set of accountability standards, like those NGOs which operated in Jerusalem.

Jerusalem's office was closed, this was done in order to cut costs and also to avoid the law, my bosses explicitly stated in a formal meeting that ' Jerusalem laws are

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more enforced than in Ramallah', they felt angry because some colleagues in the Jerusalem office reported to the law to demand their rights ...later it was prevalent that my managers transformed the organization just because they wanted to maintain full control over everything and everyone because the laws in Ramallah are not well enforced and are in support of employers. (Employee 1)

SETTING THE STAGE

The Reality of the Palestinian NGOs (PNGOs)

Palestine is an occupied country which has gone through different episodes of political and legal rule, such as the rule by the Ottoman Empire which ended in 1917, and the rule by the British Mandate for Palestine which resulted in the creation of Israel on the Palestinian Territories. Since then Palestine has gone through a new political era especially in 1948 - with the declaration of the Jewish State - where Palestine became occupied and its land was subject to partition. Consequently, the West Bank was annexed to the Jordanian rule and Gaza Strip fell under the Egyptian administration. As such political division induced divisions in the legal frameworks applicable to these territories. In the West Bank, Palestinians were subject to follow a combination of the Ottoman and the Jordanian laws. While those in Gaza strip were made to follow another combination of the Ottoman and the Egyptian laws. However, those Palestinians who resided in the borders of the 1948 Israeli state, followed the Israeli laws. Furthermore, Palestinians who resided in Jerusalem were made to follow a combination of the Israeli and the Jordanian laws. The occupied Palestinian territories (oPt) in 1967 went through more chaotic circumstances, basically after Oslo agreement was signed in the year 1994, resulting in greater political and administrative division of the oPt as well as to the division of land by the occupation to areas A, B, C where only areas A were traced to be under the full supervision of the Palestinian National Authority. All of these issues produced further division in the legislations and the schemes of control to the oPt. In 2007, an aggravated economic and political crisis prevailed and led to further complications in the legal reality of Palestine and thus Palestinians suffered from the absence of the rule of the law.

Also, Palestine as a country has witnessed prolonged occupation and endured economic and social problems due to its political instability in the form of poverty, unemployment, violence, health issues, internal and external displacement of its citizens, plus other issues.

The NGO sector in Palestine is still a growing sector, constantly dealing with different types of social crisis. For instance, results of surveys conducted by MAS

institute revealed that the number of the Palestinian NGOs (PNGOs) had rapidly grown from 926 in 2007 to approximately 3680 in 2017 to deal with the rising social problems within the country. In general, the role of NGOs in Palestine as parallel to many other countries in the world revolved around providing support to communities through eradication of widespread social, political, and economic problems. The political tension in the country plus the foreign policy interventions were among the main reasons that were behind the heightened economic volatility prevalent within the country. PNGOs operate in complex and unpredictable environments, where the NGOs are influenced by international politics. Therefore, the managers of these PNGOs have to invest a lot of effort in building relationships with donors and policy makers to ensure the long-term sustainability of the organization. Comparably they invest less time and effort in managing the internal functioning of the organization. According to Brunt (2016) HR in NGOs rather than assume a strategic role has remained rooted in the traditional praxis of the personnel function. Employees in these NGOs are rarely offered opportunities to equally participate in the overall decision making of the organization. In addition to the above issues, due to its occupied status, the local PNGOs are required to follow those laws and jurisdictions which applied to the geographic area where they resided. Therefore, if an NGO had three operating offices in the West Bank, Jerusalem, and Gaza, then each office would be subjected to different laws than the other office of the same NGO.

Foucauldian Theory of Power, Discipline and Control

This case draws upon the theoretical underpinnings of Foucault's (1977) disciplinary measures to deconstruct the internal functioning of Enti, to re-conceptualize how normal HR policies and procedures, strategic decisions involving restructuring of an organization to compete in the NGO sector could disguise devious mechanisms which impose totalizing and inhumane control over the employees.

The main elements of Foucault's theory of power rests upon his interpretation of power, discipline, and control. Power is omnipresent, it can be present and reproduced at all levels and from all dimensions. Power is not centered within an individual or a manager, instead it only becomes apparent when it is exercised (Foucault, 1981; Townley, 1993). The focal point is therefore not who has power but how power is exercised—what are the practices, techniques, and procedures through which power flows (Foucault, 1977). Power can be embedded within a policy, structure, discourse, technique or even a management strategy. Further to allow the entire exercise of power to be effective, it is necessary to make power visible (Foucault, 1980). "Power [should] be exercised by virtue of things being known and people being seen" (Foucault, 1980, p. 154).

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The emphasis is laid on rendering forces of power visible, to understand their true intent and purpose. For instance, Foucault (1977) draws upon the work of Benthan (1791) to develop Panopticon, the eighteen-century model of a prison as a modern surveillance technique. The Panopticon was a twelve-sided polygon with a central tower from where it was possible for the guard to observe the prisoners and their behavior on a continuous basis throughout the day. The prisoners could not see the guard, they were not aware when they were being observed, just knew that they were under observation. The power had passed from the prison guards to the central prison tower. The panopticon thus "embodies an architectural form, a mechanism through which power relations can be enacted—it provides a means by which direct surveillance can be undertaken by the supervisor with the purpose to reinforce the asymmetry of power between the goaler and the goaled or the employer and the employee" (Sewell and Wilkinson, 1992, p. 274). Control here is exercised from a physical superstructure, a structural model which controls human activities. Panopticon emerges as an effective surveillance model, where the supervisor is missing, but still the behavior of the subordinates is monitored and controlled. The panopticon can take different forms such as employment contracts and relationships, time sheets, team-based structures, training programs etc., where behavior of the employee is supervised via economic, coercive, and normative sanctions (Sewell & Wilkinson, 1992).

Foucault further argues about the need to render knowable the different facets of the job, work operations and processes and even the behavior of employees (1977). The more one knows about the subject, the better one can control or dominate him/her. Knowledge about the subject enables exercise of effective power –"knowledge induces effects of power … it is not possible for power to be exercised without knowledge, it is impossible to engender power" (Foucault, 1980, p. 52). Foucault emphasized the importance of gathering knowledge about the subjects and then using that knowledge to exercise power over them. The relevant issues consisted of: what are the processes by which power becomes known? How do these processes become established and used? What are their effects? (Townley, 1993).

Power was embedded externally outside the individuals and was imposed on an individual through different types of disciplines, which controlled individuals' movements, habits, gestures, speed, and efficiency (Foucault, 1977). In organizations disciplines can take the form of job analysis, performance appraisals, job descriptions, mentoring and communication policies which codify, coordinate and control behavior according to the objectives of the organization (Townley, 1993). Power exists in systems which inspect workers, observe workers, monitor their quality and speed of work. Foucault (1977) also mentions additional surveillance mechanisms such as system of examination, and confession systems found in religious practices. The system of examinations is able to measure the level of knowledge and then classify

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individuals into categories. The selection and recruitment processes in organizations bear close resemblance to the examination process. For instance, personality testing is effective in understanding a person's personality and mental schemas—the individual is rendered knowable and controllable. While confessions can take the form of selection processes such as interviews and self-appraisals, where job applicants and employees are "compelled, persuaded … to disclose about themselves" to enable placing them under surveillance and correction (Rose, 1990, p.240). Again mentoring, socialization processes, induction and professional development programs provide opportunities to the senior managers to encourage inculcation of desired norms and values within their subordinates. Panopticon and their disciplines thus possess the ability to develop into contemporary surveillance and control methods to monitor and develop self-disciplined employees within organizations (Grey, 1994). Panopticon and its disciplines can also be depersonalized to indirectly bully employees, dominate, and control them, with power flowing from the various HR policies and regulations existing within the organization (Akella, 2020; D'Cruz & Noronha, 2016; Leaver, 2018).

CASE DESCRIPTION AND PROBLEMS

Enti as an NGO is concerned with protecting victims of domestic violence. However, ironically after organizational restructuring, with the new structure and with HR becoming a part of the executive VD's responsibilities, all employees of Enti described themselves as victims of workplace bullying. Employees revealed the true reality of their working environments, as workplaces filled with domination, subjugation, with no freedom to openly express their views and opinions:

slogans such as 'the freedom of expression', 'empowerment', 'communication and dialogue', and 'accepting diversity' are instilled, yet they aren't practiced in reality. (Employee 1)

The NGO was small in size because it operated with the effort of a total of thirty-two full time employees. Therefore, Enti's directors did not see any need to designate an HR unit or to hire an HR manager. The HR function instead was embedded as an executive responsibility, and all HR related decisions were handled by the executive director and the vice director. All employees' files, records, performance appraisals and compensation records were saved on a special database which was only handled by the executives.

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Once I started my career at Enti I loved the workplace, we used to work as a small cohesive family, no full controls over our heads, we were delegated to do what we love without too much pressure and without receiving any annoying messages. Yet once the organization went through financial crises, a new administrative style started to emerge and weexperienced several forms of autocracy, bullying, surveillance, and exploitation. (Employee 2)

Job Analysis and Job Redesign

Jobs are usually created after a detailed job analysis, consisting of a review of the job specification and job description i.e., functions, responsibilities, and skills. At Enti different job positions included social counselors, therapy psychiatrist, fund raising specialists, and professionals such as accountants, media personnel, administrators, IT technicians, volunteers, and unskilled labor. However, there existed role ambiguity at Enti, there was a lack of clarity about various job responsibilities. For instance, job descriptions included phrases that can be interpreted differently but most often in favor of the employer. Albeit it is typical that most organizations add *'other unassigned duties section' in workers'* job descriptions because as such clause would provide employers with some reasonable flexibility to adapt to changing work conditions or demands. However, at Enti, the "*performs other duties as assigned*" clause, was cunningly included by the directors in almost all job descriptions. It was used to take advantage of employees because employees were forced to cover several other duties which were unrelated to the scope of their real jobs.

This allowed Enti's leadership to demand employees to take up additional responsibilities instead of hiring new employees and incurring additional labor expenses. In other words, employees were being bullied to take up additional work indirectly without any outward yelling, shouting or intimidation (Akella, 2020; D'Cruz & Noronha, 2015; Samnani & Singh, 2012). At Enti, the executive team considered this policy as job enlargement, or a type of alternative staffing solution. But as employees correctly commented, it could also be interpreted as slavery, forcing one to do unpaid, extra work:

There were no additional rewards or any type of compensation on any additional duties assigned to us,, .. the leadership approach during the crises was exploitative." (Employee 3)

.. this forced us to accept doing those tasks which were neither part of our field of specialty, nor within our capacity. I was tired and experienced treatment similar to enslavement. (Employee 1)

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Employees were burdened with additional responsibilities and tasks but were unable to complain, because the top management threatened them with termination and dismissals on noncompliance.

I disguised the practice of exploiting us, for example, we used to work for longer hours to cover the roles of those employees who had resigned, however, later this sort of become a compulsory routine during normal times and instead of being appreciated, we were penalized if we left without completing all the duties which in the first place were never a part of our job, or if in the next morning we came five minutes late. (Employee 4)

Employees were being emotionally blackmailed, surprisingly some even felt guilty about complaining or for considering leaving their jobs. They did not want to be seen as ungrateful or uncooperative (Einarsen & Raknes, 1997).

.... some employees left and their responsibilities were shared among us, I really thought if I left my job at that time, I would seem as ungrateful. (Employee 7)

The control being exerted had truly become totalizing in nature, with employees being controlled physically, emotionally, and socially. Power flowed from depersonalized nodes such as job descriptions rendering an individual helpless unable to openly complain or confront against the management.

Hiring and Induction

Enti had in place a detailed, and well-planned hiring and induction process. There were two categories of employees consisting of the administrative staff (i.e., accountants, media professionals, IT technicians, etc.) and social counselors who served as helpline agents or as field trainers in training workshops. Both groups of employees followed a well-structured hiring process.

Prospective candidates, in the first group, either held a Bachelors' or a Masters' degree relevant to the job for which they applied for, plus job related experience, along with specific human behaviors, language competency, and appreciation for the organization's mission. All job openings were advertised in national newspapers and through referrals. Prospective administrative employees were hired on ad hoc basis and went through sequential and standardized steps and competed for all available vacancies. All job applicants went through the following selection stages as depicted in Figure (3): fill an application form; attend screening interviews, participate in selection interviews, supply reference letters, and comply with other background investigations.

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Figure 3.

The second group of employees were responsible for delivering the technical and social counseling services either by listening to the beneficiaries' cases through Enti's helpline or by delivering training and awareness workshops, or by meeting with the beneficiaries face-to-face. This group of employees received extensive training before they were hired.

Enti, being an NGO was heavily dependent on its volunteers. All volunteers underwent a lengthy induction process, and many applicants withdrew even before the completion of the induction process. All prospective social counselors had to fill an application form as volunteers, then these volunteers received extensive training that extended for eighteen months. Next all volunteers served on the help lines accumulating 300 hours under two conditions. First that they would not receive any form of compensation. Second, that they would not sign any legally binding official contract. They were just refunded their travel expenses. The induction program was demanding because social counseling happened to be a humanitarian job which required sacrifice, caution, and competence. Not all volunteers possessed the required traits, the purpose of the induction program was to screen out the unsuitable candidates.

We were required to serve just as volunteers, without receiving remuneration and without having us sign contracts, ... we just received travel allowances. (Employee 2)

The Palestinian labor law states that the employee's trial period should not exceed three to six months duration in the case of contractual jobs. However, there were no explicit provisions related to volunteerism in the NGO sector. Therefore, some NGOs took advantage of this legal gap.

During the training program, the performance of a volunteer was tracked using a social observer, who recorded his/her recommendations, and submitted them to the administration. Only 5% of those who received training were hired and sometimes if no vacancies were available, the volunteers were informed that the organization did not have any openings, and they should try again later.

The induction process took a long time … and in most cases only 5% of the volunteers who received the training ended up serving as volunteers at Enti's help lines, In fact after delivering 300 hours of work one was hired as full timers. (Employee 2)

Those who completed the induction and service stages and accumulated 300 hours of training were placed in either of the two job categories. The first group was perceived as core staff and were hired as paid employees on a contractual basis. The second group continued as temporary helpline agents and were paid wages.

I applied for the job while I was volunteering and my supervisor told the executive director that I was doing well as compared to other volunteers, so the directors invited me for an interview and assigned me a new role and then I was asked to sign my new contract. (Employee 6)

The extensive selection and induction process ensured prospective and future employees inculcated the values and norms of the organization and were appropriately trained to become ideal Enti volunteers.

Compensation

NGOs in Palestine had to comply with labor laws when hiring employees on employment contracts and also when designing pay plans. Therefore, most of the NGOs in Palestine preferred to use salary scales. Likewise, Enti had designed a pay scale which covered the basic minimum wages/salaries by the labor laws.

The salaries and wages at Enti did not justify the effort put in by the employees. Further, employees did not receive any annual raises on their salaries, although labor laws in Palestine supported employers providing annual pay raises to their employees.

The salary was too little as compared to our work and we received no annual raises, although they should be committed to pay employees annual raises. (Employee 2)

Employees provided insights about other insidious tactics through which they were not treated fairly by the organization. For instance, employees had not been paid salaries for five months, and when they went on strike, the management agreed to pay their salaries in installments that too in another currency because it worked out cheaper. This action proved to be turning point in the labor and management relations at Enti.

Imagine we haven't received any salaries for over 5 months... so we all decided to go on strike and not attend to our jobs... the administration invited us on the second

day of the strike in order to discuss solutions ... after which the strike ended and we received our salaries, but salaries were paid in installments and using a different currency because this would be cheaper for the administration. At that time, we all started to take a step back to reflect on our foolish obedience… (Employee 4)

We would have not left our jobs if we had been treated in a positive manner, although our economic condition was poor we would have stayed longer to avoid undergoing the tiring process of finding another job especially when the country has been experiencing high rates of unemployment. It was like dialectical pressure, I can describe this situation as the balloon explosion.... we were no longer able to tolerate the strain caused by the leadership's unfair policies... So, we did not leave because our payrolls were delayed, but because we were all the way mistreated (Employee 5)

To reiterate, employees at Enti did not receive any form of benefits or services. Before 2007, employees had no insurance or pension plans, however they were provided with other benefits and services including free snacks, small appreciation gifts, and professional development opportunities at local and at international levels. However, these benefits ceased after the financial crises.

... at several occasions we (employees) expressed that we need to have medical insurance, especially that in Palestine we don't have social security, we don't have any collective source of protection. The top management just showed a reckless attitude as it would prove to be too costly for the organization. (Employee 5)

Employees did not receive any retirement benefits nor any letters of appreciation at the time of leaving employment at Enti. They were treated in an inferior manner as mentioned by one employee:

When we left the organization we only received retirement funds which were too little and these were paid in installments rather than in lump sum payments, an act that was disguised by most of the employees who left, we felt that we were begging our bosses to receive our own retirement funds. (Employee 4)

Employee Discipline Policies

Enti used a combination of overt and covert disciplinary measures. Employees were controlled indirectly via structural and cultural mechanisms and additionally via HR policies. Openly as well through a variety of surveillance and monitoring devices such as reading employees' emails, and installing cameras inside the offices under the pretext of protecting the organizational devices from theft. Moreover,

other unexpected disciplinary methods were enacted such as listening and tapping employees' phone conversations, all practices which can effectively be categorized as depersonalized bullying (D'Cruz & Noronha, 2015). This offended the employees and had a negative impact on their physical and mental well-being, and also had an adverse impact on their job engagement, productivity, job satisfaction, and retention.

Yes we are proctored all the time and some colleagues were used by the boss to report about anyone who was out of the office while the boss was abroad. (Employee 7)

These surveillance measures intensified tension at the workplace. Employees felt suffocated and stifled:

The discussion meetings between managers and employees went in a wrong fashion because the administration always took a defensive stance. Implicit pressuring techniques like silent treatment and other manipulative and domination techniques were utilized to discipline us. (Employee 1)

My colleagues and I loved Enti but you can no longer stay when the nature of relationships between managers and employees are no longer based on caring, openness, and respect, but rather on negative reinforcement, distrust, and discipline. (Employee 2)

Other disciplinary measures encompassed negative reinforcements such as written warnings, prohibition of informal gatherings to chat and drink coffee together during break times. Neither did the organization provide basic amenities to its employees like an air-conditioned office, proper lunch breaks and sick leaves. A few of the employee comments are given below:

When we were assigned to become fieldworkers, we worked for over twelve hours per day but without receiving any pocket money, travel allowances, or even food and beverages, this was similar to slavery. (Employee 2)

The coffee maker was disposed because we were told that we should not all meet and chat in the kitchen as we have work to be done. (Employee 7)

The temperature of the air conditioner/heater inside our offices was also controlled and it was kept at a certain degree to reduce the electricity bill. (Employee 5)

We also used a time attendance machine, the employees who did not scan their cards at 6:00 pm were evaluated as 'not committed' or as if they were exploiting

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their organization and wasting its resources, because we were required to turn off the monitors at 6:00 pm. (Employee 2)

Toxic organizational culture can now be interpreted as another form of workplace bullying where employees are degraded via strict regulations of their office hours, their sick leaves, lunch breaks, with even their internal working atmosphere such as heating and cooling temperatures etc. being regulated (Samnani & Singh, 2012).

CONCLUSION

To conclude Enti, started as an NGO committed to its social mission of protecting victims of domestic violence and taking measures to obliviate them from their pain and suffering. Yet, as a Palestinian NGO, Enti is operating in a complexed political, and legal environment. Therefore, to remain committed to its social cause and survive, and also given the occupied status of the country, with dwindling financial resources and donations, the organization undertook various strategic and structural interventions. These involved hiring a new Vice Director, removal of its middle level management, closure of its branch office at Jerusalem, dismissal of a number of employees and the adoption of an autocratic leadership style of management. The rationale behind these interventions was to reduce operating and labor costs. Instead unfortunately, these organization development initiatives created a toxic working environment within the entire organization. Employees complained about being bullied under the guise of compensation policies, disciplinary measures, organizational culture, and job descriptions. Employees' lunch breaks, communication practices and informal interactions were strictly regulated and scrutinized. Their job descriptions were modified so as to allow employees to take additional responsibilities outside their expertise without any extra compensation. Furthermore, employees were forced to work in an uncongenial and a stressful workplace, resulting in low levels of organizational commitment and job satisfaction (Samnani & Singh, 2012). All these abusive and humiliating managerial techniques were justified as unavoidable and needed to get the employees to complete their work on time (Akella, 2020; Hoel & Salin, 2003). The employees were left with no options but to either quietly continue working or quit their jobs. Employees thus felt they were *skating on thin ice* as they could face termination if they decided to go against the management or suffered from stress and health related problems if they continued working in the organization. Enti now stood in a precarious position with reduced staff especially between 2009 and 2019, when Enti lost over 70% of its core staff, and in 2020 when the employee turnover rate at Enti reached 80%. Moreover, as a result of employees'

negative publicity and legal complaints, Enti was unable to attract new employees having lost the trust of both the labor market as well as that of the community.

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KEY TERMS AND DEFINITIONS

Autocratic Leadership: Is a leadership style where the leader imposes strict authoritative control over his/her followers, rarely seeking their input or feedback, and takes all decisions based on his/her own judgment and perception.

Disciplines: Consists of all methods used to train people to obey orders and punishing them when they disobey.

Human Resource Management: Is a management function which deals with all personnel-oriented responsibilities of a business such as hiring, training, development, compensation, and implementation of labor laws.

Michel Foucault: a French philosopher whose power ideologies, addressing the relationship between power and knowledge have been used to design contemporary surveillance mechanisms to discipline and control employees in organizations.

Non-Governmental Organizations (NGO): Are organizations established to resolve social issues and problems existing within the society. The profits or the surplus earned by these organizations are not distributed among the stakeholders. These organizations are committed to altruism, humanity and towards providing compassion and goodwill.

Panopticon: Was an eighteen-century model of a prison design, a twelve-sided polygon with a central tower in the middle from where it was possible for a guard to observe the prisoners continuously throughout the day and thereby impose control over their behavior. The panopticon model has been used to design contemporary surveillance control measures for organizations, hospitals, and schools.

Workplace Bullying: Means persistent and repeated hurtful behavior directed at others within a workplace which causes physical or emotional harm to the victims.

Section 3

Emerging Human Resources Challenges in Higher Education

Chapter 9
Whither Bir Zeit University?

Anton Sabella
Birzeit University, Palestine

EXECUTIVE SUMMARY

Since its founding under the Israeli occupation, Bir Zeit University has been the catalyst for educating the Palestinian 'generations of occupation'. Its mission was to empower those who were bereft of their basic human rights and to reclaim and develop the Palestinian national identity by resisting the stultification of Palestinian youth. Following the Oslo Accords, Bir Zeit University has experienced several important developments, namely exponential growth in enrolment, unnecessary programmatic expansion, introduction of super-size classes, and irresponsible staffing decisions. Against this background and a growing financial crisis, this case study examined how managerialism has succeeded in subduing Bir Zeit University to its syllabus, specifically how cultural and structural changes have led to compromising the work conditions and relationships of faculty members. Hence, this case study bids the question—Whither Bir Zeit University?—to those who care to question the present state of affairs as well as anyone ready to search for answers.

INSPIRATION AMIDST ADVERSITY

The flag of Bir Zeit University, the oldest institution of higher education in occupied Palestine, features the evergreen olive tree on white background, between two pairs of horizontal red and black stripes. While the colors are inspired by those of the flag of Palestine, the adoption of the olive tree as the university emblem is an ever present tribute to the town in which Bir Zeit University was founded, Bir Zeit (Bīr Zyt) – Arabic for 'well of [olive] oil'. The flag of Bir Zeit University epitomizes an historic event in the lives of Palestinians, both inside Palestine and in diaspora: the

founding of the first national higher education institution (HEI) under the purview of the Israeli settler–colonial regime. Bir Zeit University writes its own tale at a time of crisis in Palestinians' lives, its tale and that of the Palestinian people are linked together by fate and by the all-consuming terrors of the Israeli occupation. It is well established that the founding of Bir Zeit University constitutes an act of redress to enliven the struggle against the occupation, and an unyielding determination to resist the brutality of the Israeli occupation and its mentally stultifying effects on a ravished homeland (http://www.birzeit.edu/). The depiction of the olive tree with Bir Zeit University goes well beyond ecology; it draws multiple, positive symbolic signifiers, i.e. resilience, tradition, enlightenment and peace; it describes the most uncommon, colossal mission any contemporary university would want to have. In this context, the tale of Bir Zeit University is a tale of hope, it is a tale of courage embodied as a stronghold within which sustenance and preservation of the Palestinian cultural enlightenment and educational enterprise could continue.

Following the 1967 war (also known, symbolically, as *An-Naksah*, meaning 'the setback') and the ensuing crisis that befell the already violated and bereft people of Palestine, what was left of historical Palestine came under the tyranny of the Israeli occupation, promising further servitude, torture and humiliation to the indigenous Palestinians. Henceforth, ethnic cleansing, imprisonment, land confiscations and death have prevailed. Moreover, to maintain the occupation's strong grip, strict restrictions were enforced on the movement of Palestinians between cities and abroad. Palestinian students were among the most affected by these restrictions. Palestinian students' only access to university education – existing primarily in neighboring countries (e.g., Egypt, Lebanon, Iraq), as there were no institutions of higher education in Palestine before 1967– became fraught with uncertainty and danger (Baramki, 1987). In spite of the harsh reality that assailed Palestinians, it did not deter their will to fight back, to defend their humanity and to dream of a future when the shackles of the occupation will be shattered. The legacy of a few visionary patriots saw this culminating in the ever more pressing need to establish a Palestinian institution of higher education capable of embodying the people's desire for liberation and enlightenment (al-Shaikh, 2015), and assisting in cultivating the soil of a strong-willed Palestinian society and identity.

By the year 1972, Bir Zeit, formerly a two-year college, had blossomed into a full-fledged university with two colleges, arts and sciences. What had begun in the town of Bir Zeit in 1924 as a school for girls carried within itself the seed of a great educational and social movement, growing into a leading institution of higher education in the nation's journey of enlightenment (http://www.birzeit.edu/). The transformation into a full-fledged university happened in response to two prevailing circumstances: the evolving needs of the community for post-secondary education, caught up as it was in the socio-political and economic turmoil that swept through the

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whole country; and, the vision of the founders whose determination and enterprising skills made this transformation possible.

Throughout the period following the wholesale conquest of Palestine and until this very day, Bir Zeit University became a constant target of the occupation's harsh discrimination and persecution measures; from army raids and pillaging to censorship of books and educational materials, as well as violation of individual rights of students and professors (in many cases a pretext for groundless detention and imprisonment), just to name few dehumanizing measures. Most obtrusive, however, has been the enforced closure of the university by the occupation forces, which would last for months, and in some cases years. (A complete list of closures by date and duration can be found on the university website.) Another important and egregious measure is the issuance of Military Order No. 854, a stark violation of international law in itself, it represents the occupation's unrelenting efforts to debilitate virtually all that a university does, and to deny Palestinian universities of all academic freedom (for a comprehensive discussion of this, see Zelkovitz, 2015).

Despite the occupation's systematic attacks – engineered solely to bring this educational edifice to its knees, the decades that followed has proved Bir Zeit University's resilience to withstand such seismic forces that threatened not only its existence, but also that of the entire Palestinian population. How well Bir Zeit understood the gravity of the situation and the need for persistence are beautifully exemplified in the words of Gibran Khalil Gibran: '[…] March on, and fear not the thorns, or the sharp stones on life's path'. Indeed, Bir Zeit University has continued its long arduous march forward and has grown proportionately in terms of the number of students and academic programs with the increased demand for post-secondary education and its ability to enlarge its pool of resources (Gerner and Schrodt, 1999). Table 1 provides a breakdown by different categories of the expansion that Bir Zeit was able to achieve in the past two decades. (However, the numbers should be interpreted with caution; but more of this later.)

The discussion of the history of Bir Zeit so far has been emphatically confined to its development under a ruthless Israeli settler-colonial regime, which continues unrelentingly to this day. The richness and complexity of this history is characterized by important junctures of events that had far-reaching social and political implications on Bir Zeit and the entire Palestinian higher education system. Most notable among these are the first and second Intifadas, interposed by the signing of the Oslo 'Declaration of Principles' on September 1, 1993, and the takeoff of a so-called 'peace process'. A thorough discussion of the extensive effects that these events, among others, have had on Palestinian HEIs would certainly overstretch the purpose of this case study; it is, however, neither wise nor just to overlook some of these effects, especially those brought about by the Oslo Accords, which are of great concern here.

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The signing of the Oslo Accords has had profound effects on the whole gamut of Palestinian life in the Gaza Strip and West Bank. For the first time, since their establishment, Palestinian universities came under the jurisdiction and direction of the newly established Palestinian National Authority (PNA), namely the Ministry of Education and Higher Education (al-Shaikh, 2015). Dictated from *above*, and buttressed by European aid money, Palestinian universities were subtly directed to concede their historic culture of resistance (Maira, 2018) and focus more on contributing to the purported process of state-building and promoting a reconciliatory atmosphere. Certainly, not all Palestinian HEIs acquiesced, though they were certain of the changes transpiring as a result of the advent of the Palestinian National Authority and the establishment of the Ministry of Education and Higher Education. For example, all funding that was previously channeled directly to universities was now being channeled through the Palestinian National Authority (Zelkovitz, 2015), whose pipeline was predisposed, first and foremost, to securing its own public and political apparatus and image at the expense of higher education and other public services. Another example can be seen in the gradual transformation in HEIs' perception of their role: Palestinian universities, including Bir Zeit, were entrusted with forging the necessary developmental tools and the training of human capital needed to develop a national infrastructure for the future Palestinian state (Bruhn, 2006). Amid these exciting times, so to speak, though muddled by the occupation's political chicanery and Palestinian budgetary constraints, the atmosphere of the higher education system was becoming increasingly marked by competition among individual universities over the setting up of new academic/professional programs and by the masses of Palestinian youth seeking post-secondary education.

As time went by, the 'peace negotiations' were clearly collapsing, naturally due to the parties' unequal powers; an air of frustration has set in everywhere and hope for a just solution faded away. Though disappointed, Bir Zeit University, as well as any other Palestinian HEI, continued to soldier on, faced with the formidable challenges inherent in institution-building and development under severe circumstances, continually challenged by the occupation. But 'the times they are a-changing', and a new reality has arrived.

Table 1. Summary of facts and figures every 10 years[1]

	Academic Year 2001/2002*			Academic Year 2011/2012			Academic Year 2019/2020		
	Female	*Male*	*Total*	*Female*	*Male*	*Total*	*Female*	*Male*	*Total*
Faculty									
Full-time	34	147	*181*	96	263	*359*	144	300	*444*
Part-time	8	43	*51*	38	78	*116*	58	112	*170*
Faculty by rank									
Professor	1	5	*6*	3	21	*24*	5	28	*33*
Associate Professor	2	22	*24*	4	34	*38*	8	48	*56*
Assistant Professor	17	92	*109*	36	162	*198*	55	185	*240*
Lecturer	5	22	*27*	9	34	*43*	23	51	*74*
Instructor	17	49	*66*	82	90	*172*	111	100	*211*
Students									
Bachelor's degree	2326	2301	*4627*	5158	3213	*8371*	8131	5044	*13175*
Master's/Doctoral degree	293	373	*666*	841	541	*1382*	995	535	*1531*
Total Students	*2690*	*2714*	*5404*	*6102*	*3815*	*9917*	*9201*	*5613*	*14814*
Number of faculties	5			9			9		
Number of academic programs	46			72			112		
Number of martyrs (up to)**	12			4			1		
Number of detainees (up to)	15			453			357		
Number of publications (up to)	202			444			767		
Number of administrative staff	319			505			438		
Number of closures***	15								

Source: Institutional Research Unit, Bir Zeit University.

* The numbers under academic year 2001/2002 are based on very close estimates.

** Each figure pertains only to the period under consideration.

***For more information on the exact dates and duration of closures please go to https://www.birzeit.edu/en/about/history/education-under-occupation/closures-history

SETTING THE STAGE

Higher education institutions are historically seen as enclaves of collegiality, freedom of expression and academic autonomy. They are entrusted with one of the high points of human experience, the development of rigorous, independent and consistent thinking and reasoning. Not long ago, however, universities came under mounting pressure to meet multilayered expectations (Teir and Zang, 2016; Al Shobaki, Naser and Ammar, 2017) and the demands of a wide-ranging constituency

(e.g., the private sector, governments, student and staff collectives, etc.), which, taken together, are believed to have obscured the higher education ethos. The fairly new situation in which universities found themselves, unfolded against wave after wave of vicissitudes facing the higher education environment. These included, but are not limited to, changes in the geopolitical order, globalized capitalism, the proliferation of technology and what scholars (e.g., Chetty and Louw, 2012) have propounded as the loss of monopoly of HEIs over the process of knowledge creation and dissemination.

In the midst of these, often intensifying challenges, which have showed no sign of abating, HEIs found themselves lacking the defenses to withstand the influx of changes and, at the same time, compelled to adapt their strategies or adopt new ones; especially, strategies that once were thought to be antithetical to the values for which a university stands. Values like collegiality, academic freedom and free speech became trivial issues, and were subordinated to principles inherently found in the private (for-profit) sector such as efficiency, productivity and control, which, so far, have permeated the entire public sector, including higher education. These principles, speculatively believed to improve the performance of the higher education system, were commensurate with neoliberal thought and policies. They exemplified the neoliberal scheme to make the system of higher education operate under quasi-market conditions (Le Grand and Bartlett, 1993). In other words, the objective is to privatize the higher education system, transferring the cost of education on to the individual, and reducing the role of the state to that of a mere bystander, whose responsibility is to maintain a market-oriented institutional framework for HEIs.

Neoliberalism's big idea, its 'organizational arm' (Lynch, 2017) to the governance and management of HEIs – by which it worked its charm into the culture and activities of universities – was 'managerialism'. In HEIs, managerialism, according to Deem (1998), is tasked with a clear mission: to replace the collegiality and laissez-faire milieu in organizing teaching and research of academics working along each other within a minimum hierarchy, with increased technicality of governance and management instruments. This almost abrupt shift had critical consequences on HEIs; increased centralization of power at the institutional top, curbing collective decision-making bodies, the use of temporary contracts, appointed as against elected posts, stronger managerial roles of deans and heads of departments and a private sector style of human resource management (Ferlie et al., 2009; Magalhaes et al., 2017).

After decades of dominating work organizations, the managerialist ideology, or what others prefer to set out as a managerialist approach to organizational analysis, relentlessly continued to lay claim to knowledge production and knowledge products, as well as the whole spectrum of objective techniques for managing the selection, motivation and promotion of employees (Townley, 1993). It is far too easy to see how managerialism predominates, almost entirely, in the field of Human Resource

Management (HRM). In deconstructing HRM, Keenoy (2009) gave an account of managerialism as '[a] key script informing HR-performance project', what Brief (2000) already regarded, perhaps more critically, as the reduction of HR to a mere 'servant of power'.

Managerialism may be reconciled with HRM in a number of aspects as the following sections empirically show. Theoretically, however, it is that overarching paradigm described as 'neo-positivism' that informed both disciplines, which, notwithstanding the differences, is deeply rooted in 'logical positivism' and its tradition in emphasizing the goals of explanation and prediction, and the testing of hypothesized and causal relationships. With the exception of few critical studies (e.g., Alvesson & Kärreman, 2007; Watson, 2004; Townley, 1999; Legge, 1978, 1995; Keenoy, 1990, 1999), there remains an enormous body of literature recurrently characterized by a single and narrow epistemological paradigm interested only in analytical statistical models and disproportionately implicating HRM to managerialism. Under these perpetuating conditions, the HR field was further alienated from critical concerns such as how people basically relate to, and are influenced by, HRM activities and practices. In another sense, HRM became a loyal surrogate for managerialism, a 'manipulable object of management control' (Rose, 1990). In HEIs, the line separating HRM from managerialism is spurious, sometimes even misleading; it is quite hard to tell, given the shared nature and goals, where one stops and the other begins.

This case study adopted what labor economists and industrial sociologists (Doeringer and Piore, 1971, in Steffy and Grimes, 1992) described HRM as 'internal labor markets', that is, a view primarily concerned with policies, procedures and practices carried out by management to control the mobility, rewards and working conditions of personnel. In HEIs, HRM was, and continues to be, almost completely immersed in mundane operational concerns, which, by and large, focus on the individual rather than collective concerns and goals, and on the enhancement of tools and techniques that improve management control and surveillance. Institutional predicaments such as teaching/administrative load, student and staff wellbeing, type of administrative controls (e.g. standardized forms and procedures), employee resistance to cultural, structural and personnel techniques, let alone developing a more thorough understanding of employee relations, are hardly given the attention they deserve. As a result, several criticisms have been leveled at HRM, including the existence of a wide gap between rhetoric and reality in universities' policies and practices towards their staff and students, and the realization that HRM, in its entirety, is unfairly biased towards the interests of management, at the expense of employees.

Distressed by the ongoing developments in HEIs, the present case study sought to explore the character of HR in a changing university culture (one that typified the shifting towards quasi-market culture), and the policies and practices it legitimized

to regulate the human resource activities. Specifically, the aim of this case study was to understand how faculty members and administrative staff identify with, and at the same time are influenced by the prevailing HRM practices and activities in Bir Zeit University. Against a background of a seemingly endemic financial disarray, Bir Zeit University offered an ideal environment for exploring the extent to which managerialism, by means of a wide array of mainstream HRM practices, has permeated the institution, with negative consequences.

The case study built explicitly on the author's own experience (insider account), and an exploratory study of a small group of Bir Zeit University academics and staff (participants)[2], both of which were supposed to deepen our understanding and appreciation of the issues at hand. While the former attempted to provide the reader with the author's critical analysis of the various changes taking place in the university culture and activities, the latter concentrated on the academics' experience and perceptions of these changes, their impact on HRM practices and on the academic and creative achievement of the staff and students.

BIR ZEIT AFTER OSLO ACCORDS

The Oslo Accords has left its illusory landmark in the history of the earnest Palestinian struggle against the Israeli occupation, which had and continues to have right up to this day cataclysmic consequences on virtually every aspect of Palestinian life. To attempt a comprehensive discussion of these terrible consequences is an enormous task; one that requires going beyond the scope of the present work. Therefore, the discussion will be limited to those challenges brought about by the Oslo Accords and its subsequent failure in the realm of higher education, viz. Bir Zeit University. Bruhn (2006) rightly implies the period after the signing of the Oslo Accords was deemed not only as a new period ushering in an era of development and growth, but also as a period of intense confusion for Palestinian universities, despite their being overzealous and quick to respond and contribute to the building of the long-hoped-for Palestinian state. As one participant skeptically put it; 'excitement in the Palestinian universities reached a fever pitch during these times'. This period, as Table 1 shows, was marked by a sharp increase in the demand for higher education, expansion in academic programs and community outreach by means of the newly founded centers and institutes.

Pursuant to the evolving atmosphere at the time, successive management teams at Bir Zeit University felt unnecessarily obliged to make a number of decisions that, according to our participants, have influenced the quality of its academic life and its relationships with members of faculty; those entrusted with enacting the university's

mission and communicating its values. Owing to this fact, it is, therefore, imperative to identify and discuss these most pertinent developments at sufficient length.

Increase in enrollment. Table 1 shows that in the periods following the signing of Oslo Accords, there was a significant expansion in the number of enrolled students. This sharp increase can be viewed in part as the normal course of development, and the increased demand for post-secondary education, particularly among Palestinian females; but also, especially of late, as a reactionary, deliberate decision to bolster a dwindling, by now endemic, financial condition. Most of the people interviewed believe that this decision has caused a terrible strain on various systems in the university; one professor thought clearly in the following terms:

The university's one-dimensional approach to improve its finances, i.e. to increase its student intake, failed to anticipate the calamitous side effects overtaxing university resources. I easily recall, from various conversations, that the founders' vision was to maintain around six thousands of students. That vision now gone with the wind, we are left with an increasing number of students whose needs and expectations are far too much to handle, as well as an unsolved, perpetual financial debacle.

Some observers went so far as to dramatically claim that the university is heavily committed to a single course of action, that is to tackle its budgetary deficit by increasing its main source of income (expand student enrolment beyond normal levels); a commitment that override all other considerations (e.g. the quality of its education). As we will come to understand shortly, this debilitating decision would affect several other contingent decisions and choices necessary to maintain this course of action.

Expansion of programs. Throughout the period under consideration, an expansion of programs, both at the bachelor and master's levels, is quite pronounced in Bir Zeit (see Table 1) as well as in all other HEIs. As much as one would expect this development to form some sort of a straight trajectory to a desired future state, it remains considerably infused with contentions. Abu Lughod (2000) was deeply concerned with the lack of coordination and cooperation among Palestinian universities, especially in the aftermath of the Oslo Accords, when the Council for Higher Education, an administrative (political!) body responsible for managing the relationships between universities, was subsumed under the Palestinian National Authority's newly founded Ministry of Higher Education; a step believed to have heightened a sense of competition among sister institutions. '[B]rought about by the Oslo Accords,' one of the participants pointed out, 'the rise of the Palestinian National Authority, whose indoctrination with the principles of the market economy have largely damaged cooperation between universities, casting an air of competition'. Abu Lughod (2000) warned that the lack of coordination would precipitate the inevitability

of the duplication of programs and curricula. What was inevitable, too, was the shuttering of some of the newly-established programs in the not-very-distant future; an indication reflective of a weakening demand due to a lack of alignment between national needs and program offerings. There is yet another disturbing outcome of this hurried, unduly expansion in academic programs. Academic departments and programs were increasingly operating with 'silo mentality' that stifle communication and collaboration between them. A highly cognizant participant had the following to say about this phenomenon: '[Academic] departments are falling into what we call "subunit orientation"; they are more and more becoming concerned with their own interests at the expense of the whole institution'.

Super-size classes. Another decision that left its deleterious mark on the perceptions faculty members have of the university management style and priorities was a new practice (now it is the norm) of lowering the teaching loads of faculty by creating super-size classes. The aim of this was to lower costs by scraping together two, sometimes three, sections into one section of a larger size. According to some faculty members, this policy has created new contentious work conditions for faculty members, to the extent of causing major disruptions in the educational process (e.g. communication breakdown, demonstrations and strikes). A perceptive participant critical of the new policy and its impact on classroom atmosphere had the following argument: 'Large classes may encourage students to be more disruptive, avoid participation, engagement, even attendance; while small classes allow for pedagogical activities that improve learning and student-faculty interaction'. A study published by the Cornell Higher Education Research Institute corroborated the participant's statement; it argued that 'class size and student load primarily influence student outcomes by altering certain aspects of courses that students find beneficial and helpful in learning' (Monks and Schmidt, 2010). The study extrapolates with empirical evidence how large class sizes are associated with lower critical and analytical thinking, less clarity in class presentations, and lower satisfaction scores of instructors.

Distortions in staffing. It should be clear by now the extent to which these decisions are related and sequential; they have some sort of a natural or logical order to them. In this respect, it is only sensible that the decisions pertaining to increased enrolment and academic programs have necessarily lead Bir Zeit University to another important, yet highly contentious decision regarding staffing the institution with the needed instructors. The staffing process in Bir Zeit has been and continues to be beset with difficulties. To a great degree, the Israeli occupation has always interfered with the staffing process in Bir Zeit. This dates back to the issuance of Military Order No. 854 in August 6, 1980, whose sole purpose was to deny Palestinian universities all academic freedom, including the hiring of faculty members (Zelkovitz, 2015). A textbook example, still operational, of subjugating Palestinian universities is the

denial of entry and re-entry visa for foreign academics, who at times are recruited by local universities and at times volunteer.

The distortions referred to hereafter are internally- or self-induced, rather than externally imposed. It is quite noticeable in Table 1 that recruitment levels are disproportionately low when compared with the increase in student population (both academic and administrative). Also noticeable is the imbalance in the gender of hired instructors. Not only do women constitute the majority of new faculty members, but they also tend to be concentrated in lower ranks. Despite the great strides Palestinian academic women have achieved, only one in seven professors are women. In a statement, one participant suggested that the process of recruitment implies the assumption of mediocrity; 'a "good enough" candidate would be acceptable and sufficient'. She continues by arguing that 'there isn't enough seriousness in the attitude of the management towards attracting and retaining qualified people'. To prove her point, she mentions the overuse of new types of contracts (e.g. replacement and temporary contracts) that are becoming firmly instituted throughout the university, which, according to her, 'obstruct the development of the entire educational process and demoralizes current and future faculty members'. The ongoing impasse between the Workers' Union and the management attest to the complexity of the recently established work arrangements; the union believes that casualization and sessional employment have been on the rise and out of proportion.

From what has been discussed so far, it is clear that these developments were neither sufficiently examined, nor their impact carefully weighed. Yet before we turn to discussing the impact of such developments on the people working in Bir Zeit University, there are also other issues almost equally depressing and equally alarming, into which we now briefly venture. First is the increase in professional education. According to a former president of the university, Khalil Hindi, the Palestinian higher education system, Bir Zeit included, remains immersed in professional education to the detriment of the liberal arts (Hindi 2013; see also Gerner and Schrodt, 1999). He further warns 'that general education has been beating a steady retreat in curricula [...] this trend does not augur well for the future of our societies'. Secondly, there is the ranking hoax. Observers view Bir Zeit University's passionate pursuit of and involvement in the global ranking game as an endless and meaningless path to fritter away resources. An upstanding professor criticised Bir Zeit by saying that 'Rankings should not be Bir Zeit's *raison d'etre*, it should direct its efforts on building quality higher education system, responsive to the needs that face Palestinians, both now and in the future'. Thirdly, there is the issue of faculty members' shrinking participation in academic and administrative decisions; they now have minimal control over the setting up of budgets and academic priorities and institutional development. This issue reverberated what Abu Lughod (2000) cautioned against, 'despite the universities' considerable contribution to democracy…they are

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centralized institutions' (p. 95). Fourthly, the environment in Bir Zeit University has changed from a 'benign bureaucracy', as one participant put it, to a 'tightly administered small business under rising financial pressure'.

To a degree, these issues are not exclusive to Bir Zeit University; some of them are of universal nature and are experienced, perhaps invariably, in educational systems the world over; their uniqueness, however, stem from the fact that Palestine lies under the control of a settler-colonial system – indeed should not be taken as a justification for the changing realities at Bir Zeit; in fact, due to the historical injustice inflicted on Palestinians, and to avoid Palestinian exceptionalism, Bir Zeit University cannot afford being reckless with how it performs its multifaceted and complex obligations in this very challenging environment. The tasks that lies ahead are of enormous magnitude, and indeed perhaps it is not too late for Bir Zeit to regain its liberating role and enlightenment mission.

THE NEXUS BETWEEN HRM AND MANAGERIALISM

The main objective of the previous section has been to identify and discuss the post-Oslo academic developments in Bir Zeit University. To achieve the purpose of this chapter (case study), however, we have to reach a point where we can consider the vicissitudes in university academic life as a result of these developments; more specifically, to discuss the implications of these decisions on the work conditions of faculty members and the intensification of job demands. This last section will discuss the establishment of several HRM practices brought about by the emergence and incorporation of the ideology of managerialism into the structure and culture of Bir Zeit University. This will be done under three subheadings: *unrestrained managerialism, quasi-market modus operandi and the realm of governance*.

Unrestrained Managerialism

Through work, the human being impregnates the external world with his will. Thereby he humanizes his environment, by showing how it is capable of satisfying him and how it cannot preserve any power of independence against him. Only by means of this effectual activity is he no longer merely in general, but also in particular and in detail, actually aware of himself and at home in his environment. (Hegel, 1975 p. 31)

As the passage above illustrates, 'work' holds a central place in Hegel's thought; it appears prominently in most of his writings. For Hegel, dissimilar forms of work activity carry within them varying degrees of freedom. He sees practical activity on a continuum: the lowest is that activity which is performed by animals, who desire

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and consume simultaneously (human beings also conduct themselves in the same way); a higher form relates to 'economic activity' which is dominated by material needs; though their gratification is postponed, it is not entirely free. The highest form of activity is found in works of 'art', a 'truly free activity, free creation', as it transcends natural needs. We (academics, intellectuals, scholars, etc.) all like, perhaps rightly so, to think of our academic profession as a 'free work activity', closer in proximity to an artistic one; it implies a basic drive for self-development and self-realization.

Historically, universities placed the academics at the center of the institution and defended their autonomy; this was an essential part of the university ethos (Altbach, 1991). 'The situation today is very different', one participant interposed, 'it is subsumed under the logic of neoliberalism, the new paradigm [managerialism] has crippled the university democratization process'. Indeed, it was becoming clear that the management at Bir Zeit were not satisfied with its traditional governance system, which was no longer seen as efficient as it should be; it realized it needed to strengthen its control by gaining more control over decisions. In a subsequent remark made by the same participant, he noted that 'academics are increasingly suffering from excessive bureaucratization and higher accountability demands'. Yet another illuminating instigation is found in the following comment: '[…] driven by economic imperatives of efficiency and effectiveness, Bir Zeit has started to drift down the path to ruin, away from the values it once stood for'.

Several scholars shared the observation that in universities worldwide, managerialism has lately been assuming the upper hand over governance. Boston (2011) argued for the necessity of utilizing various management instruments employed in the private sector, if improvement in efficiency and effectiveness are to be achieved. Dill (1997) and Meek (2002) list a few examples such as setting goals, emphasizing competition both internally and externally, and an instrumental view of markets. Throughout my discussions with the participants on this particular phenomenon, one argument stood out: 'We should not have blind faith in what other universities are doing, particularly in 'developed' countries. We have to think for ourselves and we should not allow others to think for us; what works in one situation might not in another. I am more of the opinion that everything is context specific'. In this respect, some scholars have exposed their real apprehension about the rampant managerialist mentality that has overwhelmed HEIs. One of the earliest protagonists in the counterattack is Rosemary Deem, an outspoken scholar, whose attack on managerialism builds on a specific line of thought developed by Christopher Pollitt (1990) who advocated the view that managerialism is best understood as an ideology; Deem (1998) saw managerialism as a systematic outright assault on higher education.

For an illustrative discussion of the extent of managerialism, Ferlie et al. (2009) provides very useful insights, some of which were even echoed by our participants. Most remarkably was an anecdote that stuck out; 'a flagrant attempt', according to one participant, 'of outsmarting the conventions of electing a faculty dean for the Faculty of Business and Economics at Bir Zeit.' Summarily: 'After the nomination period was over with only couple of potential candidates who enjoyed varied support from their colleagues, they were contacted and asked to submit their future plans for the faculty, and were subsequently interviewed. During all this time and during the time awaiting the result, the faculty members kind of knew who the next dean would be; to their surprise, however, and contrary to their expectations, the management decided to appoint someone else, who was not among the original nominees and did not go through the selection process like the others.' In his comments, the participant alluded to this incident as not only constituting a move to appointed rather than elected posts (Ferlie et al., 2009), but also as an abrupt sidelining of academic staff.

Quasi-Market Modus Operandi

Since the beginning of the 21st century, it seems that Guy Peters' (1996) axiom, 'management is management' has been held close to the minds and hearts of universities. Advocates of the quasi-market approach advance the notion that the distinction between public and private management is an illusion. According to Terry (1998), market-driven management, a product of quasi-market conditions, has two basic ideas. The first is competition, which rests on the belief of the efficiency of markets. In that sense, competition is seen as the way forward for improving the performance of HEIs; it lowers costs and increases efficiency. Secondly, there exists the idea that private-sector management practices are far better that those in the public sector. For the most part, Bir Zeit has addressed the pressures it was under by raising revenues through expanding and diversifying enrolment; programmatic expansion; hollowing out the teaching function through casualization and growing student-to-staff ratios; and fundraising where and when possible. In relating to these quasi-market practices, one participant lashed out in frustration at the reduction of academic support as a result of the cost-cutting measures implemented by the university. He further complains of these cost-control and revenue-raising measures as having negative side-effects; for instance, students' entry and exit standards have become extremely relaxed.

In his co-authored book, *Resourcing Higher Education: Challenges, Choices, and Consequences*, Simon Roy argued that increased hiring of temporary faculty, shrinking staff support, and moving online, have impressive and convincing downsides. For example, the increased use of temporary faculty has negatively impacted the quality of education. In discussing these examples of market-driven management practices

with the participants, most of them have communicated their disappointment with how things are turning out. Two participants preferred to talk about the ongoing conflict between the management and union, with the latter accusing the former of violating contractual agreements with faculty, especially those of a temporary nature.

Another significant symptom of the quasi-market approach at Bir Zeit University is the issue of imposing greater control over faculty. Deem (1998) viewed the issue of gaining control over faculty as twofold: externally through higher education bodies and quality assurance agencies, and internally through the activities of academic managers re-shaping and regulating the work of faculty members. My own experience attests to this idea of consolidating control in the hands of senior management; it is done through middle managers (heads of academic programs and department chairs) whose role becomes to filter reforms that ration and restrict access to faculty, even despite the apparent conflict with their professional ethics.

Though the discussion of the quasi-market conditions' growing phenomenon in the structure and culture of Bir Zeit's academic life may lead one to a long list of activities, and, therefore, not to abuse the space allowed here, it suffices to conclude this sub-section with two observations worthy of your taking note. They are clear examples of the influence market forces and business practices have over decisions within the institution. The first one is the allocation of university resources based on a profit-and-loss approach; meaning that academic programs found in close relationship with the market and are by definition 'productive' were retained, whereas those outside or those who refuse to engage in the discourse of the 'market' were trimmed. The second is Bir Zeit University's rapidly increasing tendency to engage in outsourcing academic services like catering and facilities management, which are causing havoc with professional standards. Students and faculty in their numbers have reacted on many occasions against the outsourcing of key services at Bir Zeit University. Most of the participants have expressed their reservations about what they identified as acts of privatization, saying that they are negatively affecting the experience of both students and faculty.

The Realm of Governance

It is hoped that by now it is clear that Bir Zeit University had different beginnings, during which time its perspective on post-secondary education and the role of improving the lives of its people were understood, beyond any shadow of doubt, as the democratization of higher education and the society at large, fostering open debate and creativity and addressing societal and political challenges. Bir Zeit University, for these reasons, was historically immersed in a culture of collegial governance where collective goals were at their zenith. While discussing this matter with an enchanting Professor of Law, who has been about for quite some time, he

waxed nostalgic about his earlier days in the old campus when '[they] used to meet in the open green areas and engage themselves in heated discussions over a wide range of subjects, from the latest to the most urgent and most complicated…among the crowd were the usual suspects – faculty, administrators of all levels, and female and male students'. Indeed, these gatherings and proceedings were exemplary of the time; a time when dialogue held sway over how things are done and how decisions were made.

The above remark provides an appreciably clear idea of the way in which Bir Zeit used to operate; in other words, it is referring to the governance model in Birzeit. Indeed, the concept of governance is far from being a simple one for several reasons, including the moral and legal core of the concept, the range of differentiated governance structures across the world, and the diversity of tertiary education institutions. A defining feature of governance in higher education is its collegial nature, meaning that it is shared by different constituent groups, thus allowing for a wider participation; representatives from various areas participate in regulating and deciding on academic and non-academic matters; and in many cases decisions start at the department level and work their way up to the top. This participatory approach to governance distinguishes governance in HEIs from state governance and corporate governance.

In recent times, however, as has been already alluded to, HEIs are increasingly becoming the subject of populist vilifications, which according to Steven Tufts and Mark Thomas are inextricably linked with the ongoing neoliberal transformation of the university. In their piece, 'The university in the populist age' (2017), they argue that this transformation is already underway, as evident from the casualization of academic labor, work intensifications for all employees, excessive expansion of academic ranks accompanied with a top-down managerialism. All this –happening in the midst of a wave of massifying HE and 'manufactured' financial crisis – undermines processes of collegial governance. By the same token, the participants have unanimously expressed their fears of the systematic erosion of collegial governance. 'I am much quieter and diplomatic [in the present circumstances], I only discuss my true thoughts with those whom I trust', commented one participant. 'In this climate' she persisted, 'the space and tolerance for different perspectives are on the low'. It may be inferred from the quote that faculty are practicing self-censorship and that the parameters of tolerable dissent are narrower. Moreover, the participants have spoken of the increased administrative workload and how important decisions are made by the highest levels in the administration against a diminishing influence of collegial bodies.

Throughout the discussions, the participants, with few exceptions, made clear the adverse influence the weakening collegial governance practice has had on two basic principles that lie at the very heart of Bir Zeit University. These are

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'academic freedom' and 'institutional autonomy'. Their message was clear. With the absence of a collegial governance model, Bir Zeit University will not be able to protect these indispensable means of support of a flourishing academic life. In her comments on academic freedom as being 'a permanent value' in academic life, this long-serving professor in Public Health emphasized the once liberal character of Bir Zeit: 'A university is a sanctuary for academics, researchers, even students to express themselves…its failure to promote the liberal character of its campus will unfortunately lead to wanting meaningful challenge, leaving students and faculty with only rage and indignation to defend their views'. She goes on to saying that 'academic freedom is an intrinsic value that should be defended as well as learned, but, sorry to say that, we fail big on both'. These distressing, yet discerning remarks are concluded with a positive reminder; 'both faculty and students will still have the responsibility to work together to fight back the antipathy threatening our institution; a responsibility that must be born'. As mentioned earlier, 'institutional autonomy' – the ability of a university to set its own rules and regulations concerning teaching, research and community service independently, without any interference from outside political powers – represented one of the highest points of discussion about collegiality, at least among some participants. Fortunately, though the comments of the participants on the autonomous status of Bir Zeit University were less dramatic than those of academic freedom, they still augur rough times ahead.

However, before we indulge in the views of the participants, a brief background should be admitted to keep them in perspective. The particular case of institutional autonomy in Bir Zeit University, far from a simple one, is obfuscated by the persistent factional politics, mainly between the largest two political rivals, Fatah and Hamas. With factionalism dominating the Palestinian political sphere, Bir Zeit University culture is anything but immune to the sinister consequence of factional politics; the university campus is divided between Fatah and Hamas, more precisely by their respective student bodies, each endeavoring to subjugate the university by pulling it in their own direction. Suffice it to say, that the destructive and mounting competition between Fatah and Hamas has cost the Palestinian struggle dearly; this has led to overwhelming the Palestinian collective movement by factional parochialism. In another aspect, the PNA, since its early days, has played a key role not only in the ongoing fighting between these two rivals, but also in supporting Fatah in its quest to control Bir Zeit University; it would be very naïve, therefore, to think of the PNA's role as ingenuous and neutral. Since its early days, the PNA has been relentless and for the most part successful in appropriating Palestinian HEIs in the West Bank area, with the exclusion of Bir Zeit University as possibly the only remaining HE bastion standing in the face of the PNA's vehement onslaught.

With that being said, the most worthwhile comments were bravely provided by two different professors, who attribute the possibility of Bir Zeit University's

future loss of its autonomous status to two quite different causes; while one sees it in consideration of Bir Zeit's internal weaknesses, the other sees it as constitutive of external powers, namely the PNA. Accordingly, the following comment outlines our participant's idea about the eventuality of an internally-driven vanquished autonomy:

Three things I see as harmful to an independent Bir Zeit University: first and foremost, the increasing centralization of power in the top leadership of the university is inhibiting participation from a large segment of the university population; if this issue is left unchecked governance and structural problems will be endemic; secondly, the weak leadership of the faculty and staff union, which is attributable to the ongoing attempts of the political parties to satisfy their narrow and selfish political interests, and the scantiness of the union's work agenda which continue to evolve around mundane demands, thus weakening their ability to think at the required strategic level. Thirdly, the progressive managerialist culture infesting Bir Zeit University has given vent to a growing tendency for individualism over collectivism

He concludes by saying that 'serious and hard work in the treatment of these issues would definitely build a more solid and unified university culture, whereby a fragile institutional autonomy can be strengthened'. The second possible cause of the likelihood of diminishing autonomy, according to the other participant, is the role played by the PNA intelligence services:

Many of us here [at Bir Zeit University] are aware that for years some members of the academic community and the Palestinian intelligence services had joined together; some of us, administrators and professors, are working for different branches in the intelligence agency. It would be naïve to think it is not taking place on university grounds. In the absence of a legislation prohibiting the Palestinian intelligence secret operations in Palestinian universities, our campus will continue to be susceptible to infiltrations.

These words attest to the PNA's real vested interests in Bir Zeit University. Although the PNA has at its disposal a fair number of methods by which its interventionist schemes in Palestinian universities can be carried out, our participant thought this intelligent work extremely dangerous, because it threatened the university's democratic culture, impeded its academic freedom and vilified the sanctity of its campus.

CONCLUSION

In this case study we sought to show how the history of a HEI has moved from one characterized by distributed leadership, mission-oriented goals, and a culture of collaboration and coordination, to a more managerialist approach marked by vertical and hierarchical decision-making and increased competition, both internally and externally. The analysis of the *movement* in Bir Zeit University was guided by several considerations of the concept of 'managerialism', which are deemed extremely helpful to our understanding of what is going on in HEIs in regards to human resource management practices, especially academic labor processes, and institutional culture.

The case drew upon a number of in-depth interviews conducted with faculty members and former administrators, as well as my own insider account of the organizational and management implications in recent years at Bir Zeit University, a small but successful university located in the rural area of northern Ramallah, Palestine.

In the pre-Oslo era at Bir Zeit University, the prevailing organizational structures were reasonably coupled together, which gave the impression of an autonomous collegiality and moderate anarchy. These conditions are thought to have helped foster an atmosphere that facilitated the high-quality academic and creative attainments of the university's faculty and students at the time. In post-Oslo Bir Zeit University, however, and against a background of a rising financial crisis, there has been an intensification in overt management and a reduction in the 'loose-coupling' of the institution's organizational forms, which have transformed the nature of the dominant institutional culture to one more fitting to the new managerial attitude.

How deep and extant the new managerial initiatives and how successful their consequent attempts in completely displacing the collegial governance and democratic tendencies are yet to be seen. Many remain hopeful and believe that maintaining a passive position of doing nothing is not an option; they think that failure to fend off the authoritarian attack of neoliberalism in the present time may lead us to contemplate Bir Zeit University in an age of totalitarianism.

AUTHOR'S NOTE

The title of the case study was inspired by a keynote speech delivered by Professor Khalil Hindi, former President of Bir Zeit University at the Fifth QS-MAPLE Middle East and North Africa Professional Leaders in Education Conference and Exhibition, held on May 5-7, 2015, Grand Hyatt Doha, Qatar.

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KEY TERMS AND DEFINITIONS

Academic Freedom: A moral and legal privilege granting the freedom – for both the academic institution and the individual academician – to pursue scientific and scholarly inquiries and to communicate and teach ideas to their students, even if the nature of such activities were in opposition to external structures of power.

Collegial Governance: A type of governance, prevailing primarily in higher education institutions, in which mutual respect between colleagues and consensus on institutional goals and sensitive issues are of paramount importance.

Higher Education Institutions: A broad term including not only universities and community colleges, but also vocational and professional schools and teacher-training schools.

Human Resources Management: A field of study of multidisciplinary nature that focuses on the multiple complex relationships between employers and employees, workers' unions, and the state.

Institutional Autonomy: The ability of an academic institution of higher education to decide for itself on all academic matters, including the setting of the university's academic and social mission.

Managerialism: Also called 'new managerialism' and 'new public management', can be referred to as a wide spectrum of "objective techniques" for managing the selection, motivation and promotion of employees. It is more concerned with imparting the command and control concepts of management.

Oslo Accords: An agreement marking the beginning of the peace process (or peace negotiations) between the Palestinian Liberation Organization (PLO) and the 'Government of Israel'.

ENDNOTES

[1]   I am sincerely thankful to Mr. Almutasem Abu Daqa, Director of the Institutional Research Unit at Bir Zeit University, who provided the data in Table 1.
2 Many of the ideas in this case study came to me from the conversations I had with fellow colleagues to whom I am most grateful. Thanks to my friend Professor Ghassan Faramand for the invaluable discussions and for sharing interesting stories about the history and development of Bir Zeit University.

Chapter 10
Bipolar Tension and Employee Relations Challenge at a Higher Education Institution

Niveen Labib Eid

https://orcid.org/0000-0003-0284-8155
Birzeit University, Palestine

Mays Dahadha
Birzeit University, Palestine

EXECUTIVE SUMMARY

This is a case of employee relations challenge at ASE, a Palestinian higher education institution (HEI). It reflects on real narratives and experiences of an accumulative and an endured conflict between ASE's labor union and its top management due to rigid administrative policies and pitfalls while transitioning through a strategic reform. The case urges readers to revert to the roots, envisage, and analyze 'internal employee relations under crises' from a dialogical and a sociopolitical perspective based on ideas drawn from the Habermas's 'Theory of Communicative Action' (TCA). HEIs are envisaged as sovereign workplaces that function on pluralistic values generating positive dialogue communication between all stakeholders and subsequently healthy employee relations. This case examines different episodes where ASE's management utilized autocratic leadership for utilitarian drivers causing employee exclusion and mounting tensions on campus. Consequently, several forms of overt resistance prevailed including strikes, apathy, and work interruptions.

ORGANIZATION BACKGROUND

ASE University is a Palestinian higher education institution (HEI) which was established in 1973 with the aim of supporting and developing the Palestinian community, mainly the youth. Since its establishment, ASE has continued to develop and educate forthcoming generations so that they can penetrate the labor market and become active citizens who are capable of handling leadership positions to develop their country. The university is located in the middle of the West Bank (WB) region in the Occupied Palestinian Territories (oPt), specifically in a densely populated geographic area, which offers an opportunity to attract a representative yet a diversified segment of top talented students and educators. Also, its location offers it the privilege of accessing support services.

The university opened its doors for student admission in October 1973, by offering a limited number of programs in three different colleges. At that time, the number of its academic and administrative staff was around sixty workers. Over its lifetime, ASE has been growing steadily however, in 1996 it experienced a downturn due to upheaval challenges that forced it to go through multiple strategic alterations. The first challenge involved heightened competition between the existing Palestinian Universities in the West Bank; nine local universities that offered bachelor's and master's degrees in similar tracks provided aggressive competition for ASE. The competitors devised new projects which overlapped with those of ASE. Some even induced novel programs which attracted a high percentage of junior students. Consequently, ASE suffered from students' attrition that led to a retrenchment in enrollment rates.

Congruently, a second major internal organizational challenge of limited financial budgets and a fragile infrastructure, characterized by insufficient resources and capabilities (i.e. land, buildings, teaching rooms, secondary resources, etc.) faced ASE during the same period. Given the fact that the country of Palestine has been illegally occupied by Israel for over seventy years to date; in the year 2000, an intensified Israeli–Palestinian conflict elevated during the second Intifada. In accordance, the academic process suffered from continuous interruptions due to Israeli assaults and imposed restricted geographic movement between and within Palestinian cities and/or towns. The political instability impaired the situation for most of the local HEIs causing the emergence of new forms of challenges. Consequently, similar to several other Palestinian universities, ASE faced budgetary cuts from the higher education formal bodies such as the Ministry of Higher Education (MOHE) during a period of severe economic recession.

Nevertheless, ASE was able to utilize several opportunities to overcome the current situation. It took advantage of the generational boom as birth rates skyrocketed post-1991 and until 2000. In accordance, in 2017 and 2018, the number of high school

graduates was relatively high; this created an opportunity to accommodate greater numbers of the millennial generation. Since 2000, the administration of ASE has tried to prepare for this expansion by designing a long term strategic plan, which encompassed opening up one hundred different degree and non-degree programs in both scientific and social streams that led to running six large-scale independent colleges. The preceding plan was successfully completed between the years of 2015 and 2020 in an effort to generate funding by enrolling a larger number of students hence turn the tuition fees received into a major operational revenue stream. Additionally, the new administration devised innovative internal revenue generation initiatives that included various academic and non-academic programs.

Governance and Structure

Before 1994, HEIs were supervised by the Higher Education Council (HEC) which directly reported to Palestine Liberation Organization (PLO). However, after signing the Oslo accords, the Ministry of Education and Higher Education (MoEHE) came into existence and thus became the main body that is responsible for the governance of HEIs (European Commission Report, 2017). The MoEHE has minimal intervention in the strategic mandate of the Palestinian HEIs. However, to coordinate work between and among the various forms of HEIs in Palestine, MoEHE devised a specialized formal entity known as the Accreditation and Quality Assurance Committee (AQAC) which serves as an authorized agency responsible for the accreditation and quality assurance of higher education in Palestine.

Just like various other HEIs which operated in Palestine before the year 1994, ASE had to acquire authentication from formal legislative bodies (i.e., HEC, ministry of labor, etc...) to operate validly. At that time, in 1973, the basic minimum registration and licensing requirements necessitated the formation of a governing body as well as the proffering of a set of deliverable higher educational programs and degrees. In accordance, a Board of Trustees (BOT) was created with the main responsibility of coaching the top management while monitoring and evaluating the organization's overall progress. Comprehensively, the BOT had four main responsibilities such as (a) recruiting and assigning the president, as well as selecting additional top managers, (b) coaching and steering ASE towards a better future, (c) enlarging ASE's networks and presence, and (d) setting fixed standards of accountability that are followed by constant monitoring and correcting of eccentric practices.

Given the fact that at that stage of its establishment the institution was a small-scale organization, it operated using a simple functional structure (Chandler, 1990). It was administered in a centralized yet informal fashion during the years that extended from 1973 to 1984. At that time, all employees including the administrative and the academic staff worked coherently as a family; each entity knew the other, and

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correspondence with the bosses was open, direct, and immediate. Work complexity was not an issue due to the restricted number of students and the limited number of programs/degrees being offered.

Over the years, with an increase in programs being offered and in the number of students, the existing structure proved to be inadequate in accommodating the accelerated expansion rate of the institution. In 1985, a new president was hired, he realized that the current simple structure presented several administrative difficulties, along with other internal concerns, such as (a) ambiguity in inner organizational communication, (b) interpersonal and group conflicts, and (c) mismanagement. Hereupon, his first decision comprised institutionalizing the work at ASE and adopting a new structure that was compatible with the relentless growth of the institution. In exemplification, three different colleges are now operating to offer a total of thirteen different types of bachelor's degree programs. The number of staff increased from sixty to almost two hundred. Accordingly, a divisional structure was utilized, in which each college was treated as a distinct independent division that induced new positions (i.e. Deans' and Department Heads).

Congruently, the administration of each college reported to the top managers who at that time were the President and Vice President. The Vice President assisted the President in the management of the daily administrative and academic affairs in addition to any other relevant tasks. Figure (1) manifests the modified structure between the years 1985 and 1996. The figure also depicts that at ASE, service/support administrative and technical units were added to offer transactional assistance for all organizational divisions as well as top management (service units reported immediately to the top management). These units covered: the students' registration, IT, library, HRM, logistics and services, procurement and contracting, and finance.

Figure 1.
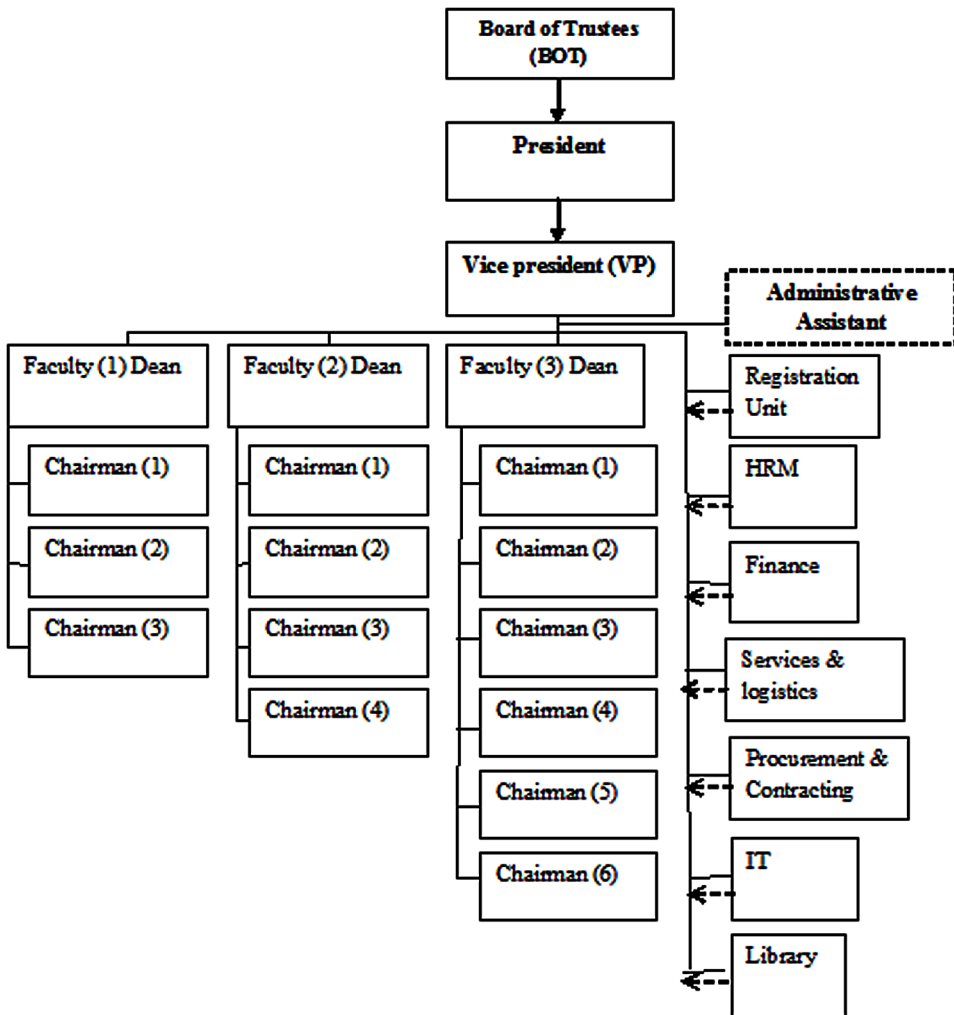
New Managerialism' and Structural Alterations

'New Managerialism' or 'Neo-Managerialism' are notions used to represent a trending ideology that involves the adoption of public institutions - i.e., universities - a set of organizational models, managerial practices, and organizational values practiced by the private sector (Deem, 1998; Micocci and Di Mario, 2017; Clegg, 2014). Historically, universities were managed according to the doctrines of masculinity that were derived from 'old managerialism'. At that time, universities faced a powerful influence of the existing religious and political systems that were

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dominating the nature, intent, and outcomes of the HEIs (Blackmore, 2002). In today's modern world, HEIs have been exposed to new strategic reforms that laid the foundation for new shapes of masculinity and domination through the utilization of 'New Managerialism', thus, not much has changed (Deem, 2001; Deem & Brehony, 2005). Apparently, this is due to the new managerialism practice adopted by the neoliberal universities (Deem, 1998; Lynch, Grummell & Devine, 2012). That being said, those adopting the previous, were drifting towards generating greater revenues, delivering classes for hundreds of students, and fell into the stream of becoming more commercial rather than efficient (Anderson, 2008). Accordingly, ASE along with other HEIs in Palestine have also been subject to this wave of reformations. The key rationale behind the indulgence into it is the need to respond to a series of heightened demands including but not limited to the lack of government funding that must be directed to education, shifts in employees' work values and expectations, globalization, technological development, and highly competitive accreditation and measurement requirements. Given those hurdles and in pursuit of maintaining its leadership position, ASE adopted an 'aggressive concentration growth strategy' (Ansoff, 1965). Therefore, it achieved greater public visibility and stronger branding during the years 1997- 2020. Congruently, over the last two decades, ASE did not have any setbacks, yet, continued to grow vigorously by offering additional academic degrees/programs and succeeded in obtaining the support and consent of formal bodies including the MoEHE.

In 2020, ASE had approximately 750 academic and administrative staff members, along with over 12000 enrolled students. As work on campus became more complex and hectic for top managers, there was an inclusion of vice presidents for academic, administrative, financial, and social affairs. Accordingly, the academic divisions had to follow a matrix structure where Deans reported to the three Vice Presidents mentioned earlier based on the level of responsibility or nature of authority, while centers and institutes reported to the Vice President of Social Affairs in particular. In accordance, service and support units were enlarged to accommodate this expansion in both organizational size and the job demands, which in turn resulted in the emergence of another matrix structure where employees in these service units reported to the two Vice Presidents of Administrative and Financial Affairs. Figure (2) presents alterations in the organization structure between 1997- 2020.

Figure 2.
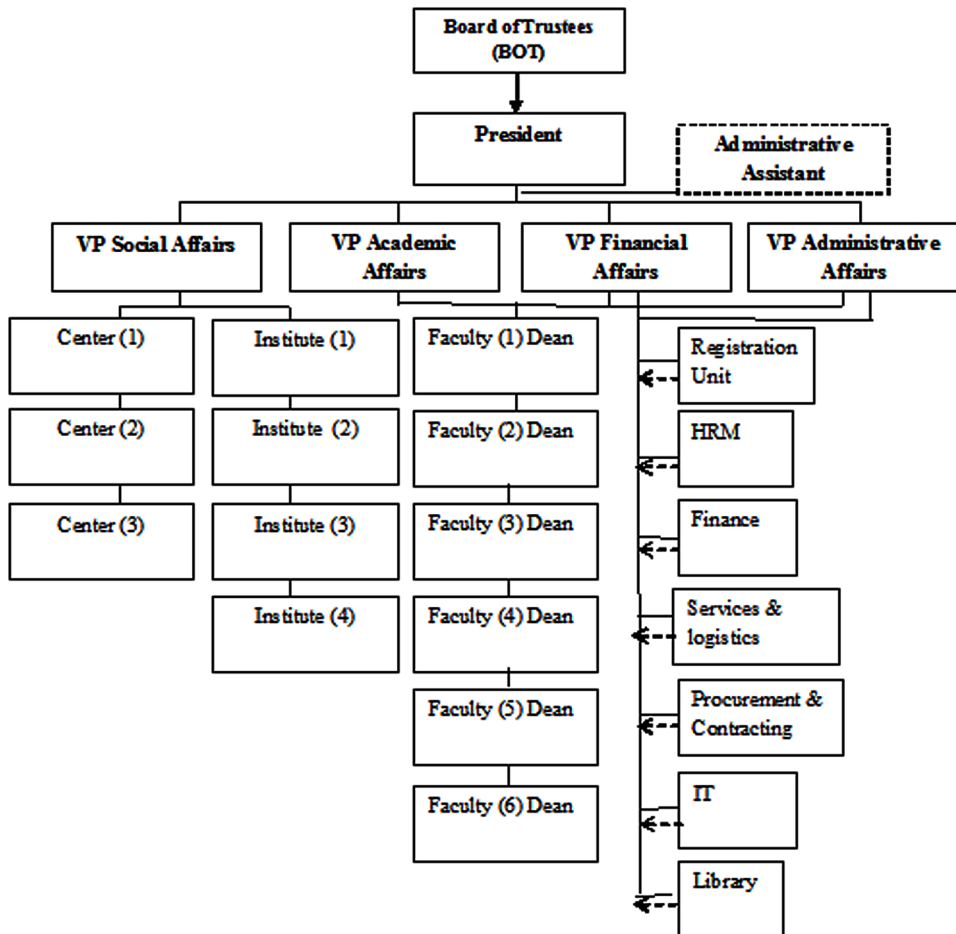
From an economic perspective, applying 'managerialism' at ASE has been envisaged by the new administration as a pragmatic solution toward the achievement of greater organizational effectiveness and efficiency. However, by dwelling on a critical sociopolitical perspective, the new managerialism has created several adverse organizational and relational effects (Mok, 1999). To reiterate, the new market-oriented governance system which was practiced at ASE and the other Palestinian HEIs has created hostile competition between and among the operating universities and caused shifts in the true mission of universities as the 'community's change catalysts'. The Palestinian universities were placed in a position where their practices should remain continuously measured and benchmarked to those of the international universities. For instance, ASE was expected to conform to outcome-oriented requirements including

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rankings, research, financial and educational targets. At that stage, it was apparent that more emphasis was directed toward academic capitalism and the marketization of educational services. For example, at ASE great strategic emphasis was given to policies and procedures which have stressed economic adaptations of cost-cutting, efficient capacity utilization, and bureaucracy. Likewise, deans and managers were appraised based on their economic contribution to their divisions as well as to the university. Therefore, commercial-oriented activities were utilized as a new route to generate internal revenues, and new attempts were pursued to transform the university into an entrepreneurial university (Nickson, 2014).

New Managerialism' and Culture

ASE had a uniquely warm and liberal culture along with very few HEIs in Palestine, which allowed it to enjoy the principles of diversity, openness, and change under a Palestinian setting. At ASE, profound norms of humanity, generosity, and democracy prevailed over the majority of the university's community. One can easily perceive ASE's democratic workplace that values differences and accommodates change. These values are integrated into guiding the academic, social, and administrative work at this academic institution. It is not by coincidence that ASE had become the first choice for students and employers until nowadays, but mainly due to its liberal culture which offered people the broad sphere of freedom of expression and the sense of equality. ASE had always been recognized as a societal change catalyst and as an entrepreneurial entity not only due to excelling in academia but also because it had transformed the societal values and created new generations of leaders who exhibited its deeply enriched values of openness, respect, democracy, and change. The internal communications at ASE were pigmented by these deeply held assumptions and individuals enjoyed a great extent of job autonomy. The leadership behavior was also strongly influenced by those guiding ethical values, and until 1995 it had been managed in a democratic mode. However, over the past few years, the latter leadership style started to diminish once strategic initiatives implemented resulted in the displacement of top management by a new administrative body that embodied a 'managerialistic' ideology. The new administration wanted to cut down costs by enforcing new disciplining procedures, therefore, new values of autocracy and power distance prevailed. The collegial culture was replaced by a managerialist one (Harris, 2011). Disciplinary instruments were employed and these embraced features of a totalitarian institutional form (Lynch, Grummell, & Devine, 2012). The attempt to emulate standardized measurement and surveillance methods of the capitalist market resulted in the creation of a highly-individualized culture which was considered as undesirable by most academics. Several individuals including managers, academics, and employees, were forced to develop values of subjectivity,

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economic self-interest, career interest, professionalism, all of which are implicit yet self-rationalized control and domination mechanisms (Bruner, 1996). It is thereof, first-order values of trust, solidarity, caring, and integrity at ASE were subordinated to lesser order values of competition, regulation, and extensive control.

THEORETICAL REVIEW

'Communicative Action'

In 1984, Habermas introduced the 'Theory of Communicative Action' (TCA), a social theory which induced a critical yet a viable understanding and explanation of how ordinary dialogue, interaction, or communication occur in societies. Habermas contended that ordinary communication differs from other forms of human action because it is oriented toward mutual agreement rather than success. Rather than mastering the world through instrumental action, the TCA aims at reaching 'intersubjective' understanding. Primarily, the antecedent mutual understanding infers intersubjective translation of aspects of social reality (i.e., strategic reforms of universities, employee involvement, etc...). Besides, it befalls when the actors agree upon a common ground of understanding of what exists in terms of an objective field of events, facts, and states of affairs, what is right and legitimate utilizing the social world of norms, and what is favored or desired based upon an internal realm of personal experiences and emotions (Habermas, 1984). In accordance, communicative action dwells on the concept of 'communicative rationality' that is inherently integrated into the human speech; it denotes an unrestrained practice that is portrayed by the actor's compulsion to provide rational reasoning for or against the validity claims proposed, to challenge, accept, or reject claims of others (Mingers, 1992). Albeit, to achieve mutual understanding, Habermas stressed the idea that argumentation should be based on the universal ethic of 'moral conscientiousness' (Habermas, 1990). In other words, for communicative action to occur, individuals in a social space should freely discuss and raise arguments without any form of power or pressure (Habermas, 1987). TCA discloses the presence of existing and potentially conflicting interests and enables the identification and assessment of their legitimacy. Also, it unveils underlying assumptions, hidden agendas, covert actions, and taken for granted the benefits of privileged entities (Myers & Young, 1997). TCA uncovers the roots behind several organizational and societal tensions and provides critical insights under the premise that by taking away the voice of employees and replacing their freedom of expression with 'disciplined freedom of discussion (Chong, Geare, & Willett, 2018) the chances to establish 'communicative action' is only minimal.

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SETTING THE STAGE

Challenges Facing Palestinian HEIs

Palestinian universities operate in a geographic region that can be best described as an 'extreme context' (Hannah, Uhl-Bien, Avolio, & Cavaretta, 2009; & Alvi, Prasad, & Segarra, 2019). A total of fourteen universities operate under a deteriorating economic, political, and social context (PCBS, 2017); nine of them operate in the West Bank region, whereas the remaining five operate in Gaze Strip. The geopolitical nature of the occupied country subject these operating universities to endure assorted institutional constraints, that limit any latitude given to leadership to efficiently run the institution (Baramki, 1987; Khoury and Prasad, 2016). Some constraints cover but are not limited to geographic mobility restriction, limited access to resources, and imposed stern regulations that deter innovation, research, development, and academic freedom in particular fields. Congruently, other demographic shifts as the increase in number of high school students emerged forcing universities to adapt by increasing student enrollment (MoEHE mid-term strategy, 2010-2013). Nevertheless, the foremost challenge remains to be the lack of funding. Hereupon, this financial crisis raised concerns regarding the financial sustainability of this sector and the quality of education. Approximately, 60-80% of the operating budget of universities was covered by tuition fees, and since no regularity and consistency in payment of tuition fees existed, universities' budgets suffer yearly deficits (European Commission Report, 2017).

In Palestine, the legal form of universities include governmental, public, and private ones. The MoEHE can financially support only the governmental and public bodies. This is because, under Higher Education Law, the government is committed to financially and administratively support the government-funded universities according to the annual general budget, however, the MoEHE does not have any financial autonomy; its strategies and polices are donor-driven and are determined by the available funding. It can fund universities in a way to compensate for the deficit in the university's budge after collecting the tuition fees (European Commission Report, 2017). For instance, if a university as ASE collects around 60% of its running costs from students' fees, the government is expected to cover the remaining 40% to make up for the deficit.

Ultimately, in response to the rapid changes in the higher education realm, Palestinian universities eventually became more hostile, which created a need to utilize and replicate business-like practices in order to reform the governance, structure, and financial systems. At this stage, it is apparent that the administrative bodies of Palestinian universities exhibited a 'managerialist ideology' because they believed in the latter's 'doctrine of TINA', "there is no alternative" way to run a

modern university (Klikauer, 2015; 2019). For that reason, Palestinian universities operating under the lens of 'new managerialism' were positively envisaged and rationalized (Klikauer, 2013; Deem, 1998; Shattock, 2000; Mueller and Carter, 2007; Chauvière and Mick, 2013).

CASE DESCRIPTION

Strategic Transformation

The aforementioned contextual changes and trends paved the way to the emergence of several strategic transformations at ASE. Changes in the university's governance composition, the university's regulations, structure, and academic processes took place over a five years' period (2015-2020). This was purposefully done to facilitate organizational expansion. According to the decision-makers of the new administrative body at ASE, this strategic transition (expansion) was assumed to be one of the best available scenarios to source and maintain funding while successfully competing with the local higher educational institutions. It seemed that the new management adopted a different ideology than what the university used to extrapolate in the past, one that is driven by economic and convenience drivers. Radical changes were induced while having minimal inclusion or participation from the employees or the key functional units. These strategic changes resulted in severe implicit effects basically in the form of organizing the university in a hierarchical and undemocratic institutional model. Consequently, the university has been transformed into a sphere where non-managers (i.e., employees, academics, students, etc...) have little substantive influence on the major decisions that affect their lives (Klikauer, 2013; 2015). Accordingly, the type of relations inside ASE has transformed from being social and collegial to social behaviors characterized by reciprocity and instrumentality.

"Enduring financial problems is not uncommon because the university has been experiencing financial crises for over two decades... in the past, it succeeded to come over it. I don't think the new management had done all of these changes due to a financial episode but rather to embody a managerial philosophy that is self-focused, carries divergent values of capitalism, and makes the presence of a ruling system more tangible." (Employee 8)

Several major changes had been induced but led to tensions and resentment within the internal community of the university. These changes covered the following areas:

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1. New projects were initiated under a commercial scope in order to generate internal revenues, creating resentment on part of the employees because the intent of the new projects diverted from the university's core values affixed upon being social ones.

2. Strategic transformations related to administrative implementation tactics were transcended without considering how employees would respond to those alterations. Among these were the following:
   a. Relocations in the university's units, demotions of supervisory positions, and the termination of specific contracts.
   b. Sudden rotation of a group of administrative employees and researchers.
   c. Centralized managerial control over most of the units as the major operational units reported to a single top manager and some employees said that *"there was a continuous demonstration of micromanagement and the middle managers were deprived of their natural strategic autonomy."* (Manager 1).
   d. Ensued full control over the organizational resources by the top management and the lower units were treated more as monotonous implementers.
   e. Obliteration of upward communication as employees could not resort to any other entity once they sought help except for the labor union.
   f. Sudden amendments on contracts a matter that has created greater tensions as employees believed that their security was put at risk because the employment contracts had vague statements that can later justify the employers' agenda when the employer intends to terminate the employee.

The type of contracts being offered to service jobs and some other temporary employment contracts include vague regulations that would lead to legal misinterpretations, also people employed in these jobs are paid less compared to their roles and responsibilities prescribed in the job description. Yet, employees are forced to accept the employer's agreement in hopes of receiving regular full time contracts. However, after spending two years in their current positions they were surprised they were terminated. (Employee 3)

3. The academic process also went through changes causing further pressure and tension. To cut down operational expenses, the top management utilized several tactics. First, it was through amplifying the classes either by raising the numbers of students' enrollments in each course and each section, or by altering the small interactive classes into lectures that are offered in larger halls. Second, it was in the form of a ceased hiring policy. While the third, was when ASE hired part-timers

and offered temporary short-term agreements for the fresh academics. And the last tactic was to cut down budgets allocated to the academic units and colleges.

Strategic Ramifications

Management was optimistic about the application of some ad hoc solutions such as increasing the cash flows coming from operations (i.e. tuition revenues) by elevating the number of students' enrollments. Albeit, it was found that an increase in revenues simultaneously brought up an associated increase in operational expenditures accompanied by a new form of academic challenges. For example, the millennial generation had different values as they were more outcome-oriented and focused on achieving academic results without exerting sufficient effort. Furthermore, the academic staff complained that they had to face logistical issues to accomplish their daily duties because these sections were condensed and they needed additional proctors, extra resources, and bigger halls. Also, students were dissatisfied because their expectations were not met. It was also apparent that the top managerial positions experienced high turnover due to conflicts between the vice directors as mentioned by one employee:

"In the management body, itself, there are a lot of existing conflicts; the vice presidents themselves barely talk to each other comfortably and each of them wants to imply his/her personal view leading to discrepancies, hence, there is never a single unified view." (Employee 6)

The imposition of the 'managerialist ideology' born in another context has resulted in additional problems than solutions. The aforementioned accumulated challenges had generated more financial deficits and thus intensified the financial crises challenges. The same challenges recurred creating a repetitive vicious cycle that required constant advancement of solutions. The latter decisions expelled new forms of challenges combined with forms of interpersonal and group social tensions and these included: an erosion in the academic freedom and autonomy, amplified work demands, increased work hours with consequent insecurity in employment, stress, anxiety, frustration, and loss of morale among employees (Rees, 1995; Chandler, Barry, & Clark, 2002). That, by and large produced meager employee relations, and employees reacted by resorting to labor action.

Unionization

Unionization at ASE is practiced under the context of the university's outlined laws and regulations. Congruently, the Palestinian labor law broadly dictates such

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procedures that employees must follow to form labor unions. However, no specific bylaws related to universities as a unique semi-governmental organizational sector are devised to support subsequent labor actions. Unions at Palestinian universities fell short to achieve impactful results because their legal role has historically been marginalized by both the employers and the common labor laws of the country.

Besides, collective bargaining of Palestinian universities encountered difficulties when attempting to search for approaches to modify amendments, or to craft new bylaws that would offer unions a strategic role in enforcing labor action and reforming the governance system into a supportive one. Some advisors think that the latter deficiency was a core reason behind employers' long-standing exclusion of employees in the process of organizational strategic change; employees were solely treated as implementers of change. For over one century, the unionization governance and syndicated labor laws were not revised, neither new laws designated for the HEIs were added to them.

I think labor unions/collective bargaining in Palestine tend to be more reactive. Because their roles are legally marginalized ...., the key role that unions should have played since ages is to collide and raise disputes or at least collectively bargain against having them being excluded and not treated as a strategic legal partner. To achieve this, the union should demand for a modification in the unionization governance system and should instill the need for applying reformations in the (obsolete) labor relations laws and regulations. (Employee 1)

Regarding the preceding, the unionization process at ASE went through three main stages including the following: union formation, the formation of a dialogue committee, and the negotiations stage.

Stage (1): Union Formation

The formation stage involves 'union elections', where employees democratically elect their union representatives from a list of prospective candidates. To compete vigorously, candidates are grouped into several lists. In each list, there should be at least one member nominated for the position of 'the union secretary' who acts like a union head and is in charge of effectively managing the relations between the union and the management as well as leading the union effort in a fair and legal sense. The other elected candidates serve as union members and might be assigned different responsibilities.

Stage (2): Dialogue Committee

The dialogue committee is a standing organizational committee. It includes union members of those who won the elections and some administrative representatives who are often elected by the top management. In case tensions arose during negotiations between members of the dialogue committee, the general assembly which is assigned by the top management and approved by the union should act as a mediator to resolve the emerging dispute.

Stage (3): Negotiations Stage

The dialogue process takes place when union demands are raised. Most of the commanded demands represent basic labor rights and cover issues related to job security, employee contracting, promotion procedures, pay issues, and health/safety conditions.

In general, labor demands covered employees' job security, and securing what employees deserve from financial dues and promotions. In addition to devising fair, clear, and vivid, incentives and promotions systems. (Employee 2)

Demands are usually negotiated and discussed by members of the dialogue committee. The union raises several demands, however, in the bargaining process, only a limited number of controversial demands are achieved. When both groups reach consensus, a formal labor agreement is devised. The agreement clearly states those demands that the top management promised to deliver under explicitly stated conditions and timeframes.

In some circumstances, the top management exhibited weak response and deference toward particular demands (some managers at ASE explained that this was due to compelling circumstances that were beyond managerial control). Nevertheless, such cases of deference were treated differently by both units. Delays were repeated frequently, leading employees and union representatives to think that the administration had hidden agendas, especially that those consequent implausible delays were not clarified by the top management. Therefore, miscommunication was judged to be among the major reasons behind any prevailing tensions.

Tension is mainly a product of miscommunication. It was obvious that the management had a political agenda while corresponding with the labor union as it did not clarify the real causes behind not meeting certain demands or the rationale behind stalling them. However, the union escalated matters as demands were regularly postponed

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and employees started to become convinced that the administration is trying to suppress labor action. (Manager 1)

Moreover, extended tensions arose when union members revealed that some administrative managers conveyed falsified facts about the attitude or actions took by the union.

During some conflicts, we were surprised that even the cases delivered to the presidency aren't transmitted as it was discussed by the dialogue committees nor us. There is a divergence in facts between the management members themselves and a clear reform in the whole image. (Employee 5)

Escalations occurred and the union accordingly raised labor disputes.

For example, when the negotiation extends along a period of 8 months to over a year, without being responsive, we must take a stand, reply with strength and raise disputes to grab the managerial attention to the reality of the cases which need firm solutions. (Employee 4)

PROBLEM

Dialogue or Tension?

Dialogue is merely defined as a conversation and a process of awakening that entails a free flow of meaning among participants who think together in association (Isaacs, 1999). Dialogue is a central element of any model of organizational transformation (i.e., strategic planned change) and a channel of learning and understanding (Schein, 1993). Yet, most importantly, it reveals the incoherence in thoughts and helps organizational members discover areas of conflict to facilitate the establishment of a genuine and collective consciousness (Bohm, 1996). Accordingly, ASE fell short in effectively initiating organizational dialogue within the institution.

The labor union received lots of complaints as employees showed high levels of resentment towards the applied managerial philosophy. The union accordingly decided to act legally to contain the situation albeit it was committed to defending employees' rights by gradually applying the following steps:

- In the year 2016, the first list of labor demands was raised to the dialogue committee for discussion. A few demands were approved and an agreement

was initiated for the demands to be fulfilled by the management within a specific time frame (i.e., one to two years).

- Some basic demands (i.e., transferring employees from temporary to full time/regular contracts, plus raising the cost of living adjustments) were not met but rather deferred because the university went through financial crises.

- Between 2015-2018 more strategic transformations took place that prompted the relocation of staff members, and revision of academic processes. As a result, employees experienced pressure and again reverted to the labor union, yet, this time they had different demands. The new demands covered primary employee rights that should be promptly met. For example, a group of employees raised complaints that their job security was at risk. After reviewing employees' files, the labor union added new demands to the list. Yet, objections were raised by some administrative members in the dialogue committee; they said that hiring and firing decisions are managerial decisions that should not be subjected to negotiation. Besides, some individual cases were also excluded from the list as the committee was asked by the management to simply discuss collective rather than individual cases. Employees and unions received restricted freedom of expression or the so-called 'disciplined freedom of discussion' (Anderson, 2008).

- Subsequently, the union has sent letters that were perceived as offensive by some managers. The letters revealed information about cases related to selective managerial behavior. In response, the top management immediately confirmed that most of the demands are declined and in effect delayed action.

- The union reacted by raising a labor dispute and a first strike took place (the language of both parties at that stage was provocative and aggressive).

- Following the strike, the top management invited the union to renegotiate the agreements. Once the union made further concessions and reached an agreement with the administration, the top management delayed action again and showed a careless attitude.

- In consequence, a year after, further labor disputes were raised.

Each year, there was a minimum of one strike per semester, or a threat to make one, to force the management to negotiate in order to reach common ground, especially that demands, covered cases that stumbled employees' job security. (Employee 2)

Common paradoxical points of discussion appeared to surface which have later intensified conflicts between the union and the top management. Both groups carried divergent ideologies and values, different communicative modes, and contrasting expectations about the administrative decisions and actions. For example, the labor

union showed high resentment toward new managerialism and the use of autocracy and full domination while having employees excluded from strategic planning. The dualistic/pluralistic ideology was replaced with a unilateral reductionist one (Hofkirchner, 2013).

From the union's perspective, the current management team mistreated the different stakeholder groups and the union was placed in an inferior position....they (managers) induced divergent managerial norms (i.e., autocracy and suppression) instead of preserving the university's liberal and communal nature. (Employee 6)

Both parties exhibited differing 'moral consciousness' (Habermas, 1990) concerned with how dialogue should be practiced as well as how the institution should be run. For example, values of liberalism, contribution, and cooperation, which tended to be treated as 'universal values' (Habermas, 1990) were replaced at ASE with 'self-serving' and 'market driven' norms as noted by some employees:

Some of the top managers played a political role for hidden economic or self-serving agendas... they just wanted to disassemble the organization and destitute it. There is an attempt to transform the institution into a materialistic system that views it's relationships from a money-oriented scope, one takes a salary, performs specific tasks, and then leaves back home. However, we (employees) have different views, we all contributed to it, we all have ethical shares in it. (Employee 3)

There is a state of conflict within the management team, each person is looking towards personal glories, privileges, and authority. (Employee 4)

Moreover, according to Habermas (1987), communicative rationality and dialogical knowledge are prerequisites for the practice of communicative action; both are collective and organized naturally. Therefore, for communicative action to occur, 'collective construction' should be achieved. The latter stems from the exercise of participants' existential right to express their minds and dialogue with each other without experiencing imposition, and thus visions of their world are shared and discussed, but not obtruded.

This is also valid to the practice of leadership, in which its effective form is the extent to which a leader continually and progressively directs his/her followers to the agreed intention that is defined by the entire group (Bass, 1985). However, employees at ASE associated the emergence of heightened tensions to a leadership behavior and a managerialist ideology that created high power distance in managing employee relations as the organization was directed in a highly centralized and autocratic fashion

(Lewin, Lippitt, & White, 1939). From a sociological perspective, 'autocracy' inhibits 'communicative action' as it is a means of suppression, domination, and exclusion.

Councils of colleges and departments should be granted authority in autonomously managing their departments away from the policies of management. (Employee 4)

The more people are involved in making key decisions, the more we go towards institutional communal work with transparency and accountability. The worst that could happen is the domination of a small group of the administrative body to project the future direction of the university. (Employee 7)

Engagement or Exclusion

Dialogue has moved from being a two way 'collective communicative action' to a 'teleological/strategic mode' (Habermas, 1984, p. 85) activated by high autocracy and negligence (Kilkauer, 2013). Habermas (1987) argued that for communicative action to take place, three pretensions of validity should exist: 1) the inclusion of every subject capable of speaking and acting in the discussion process; 2) participants should freely share dialogue and propose new convictions, needs, or problematic arguments; 3) no participant should be deprived of his/her previously described rights either from internal or external forces. In the dialogical process which took place at ASE in the last five years, under the authority of the new management team, several significant participants were excluded. The union was rarely consulted concerning critical decisions relating to labor rights, albeit, employees were expected to act as implementers.

In some occurrences, administrative employees covered relocation without consultancy, terminated employees' contracts, and deferred extra payments that should be paid for overtime employees, along with other actions as reiterated by some union representatives:

We were expected to serve as implementers and remain silent. The management has to stop and review all of its procedures, and listen to all those who compose the institution's body.... The management said that it is not our job to interfere... every action they take is reflected upon the labor, hence, the union has all the right to interfere... (Employee 6)

It is because of their (top managers) rights, the reforms in direction and policies of the organization that bypassed all of us and rocked the core of our rights. In this case, we're not only focusing on the direct financial means as it extends way beyond this. (Employee 4)

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Language can be a key barrier to the achievement of 'communicative action' (Habermas, 1987). The communicative language between both parties was characterized by hostility due to various reasons, including but not limited to union representatives not being given attention by the top management due to being busy with other dilemmas, which is an issue of major concern. Although the union relinquished some demands and postponed the raise of disputes given the severe challenges which have faced the university, the top management still stalled the achievements of previously signed labor agreements and postponed the dialogue committee discussions.

Nevertheless, during this period of the global pandemic, our relationship is positive, we showed high levels of responsibility and empathy towards the current imposed circumstances. We postponed a lot of cases that we felt were necessary in terms of employee rights, but, because of the current situation, we are enduring it. We had a lot of suggestions to ease off the conditions of our colleagues and to help the management, even though the management has marginalized us at the beginning; they didn't take our opinion in terms of our academic jobs nor our labor rights. (Employee 1)

The management always stalls and does not reply positively. Negligence and exclusion have led to frustration and have also elevated tension forcing the union to strike. (Employee 6)

Those administrative actions were perceived by the union as provocative and led to dialectical maneuvers. Employees received electronic messages from both sides and the language of those messages revealed hostility and divergence in opinions, which led to diverting the communicative action from occurring instead of bridging the gap.

For sure, it was provocative, we are not very proud of the language of communication nor speech at some particular instances (from both sides). Sometimes the management pushes us into using an aggressive language, as in some cases it is the only resort to raise our concerns. (Employee 5)

Exclusion also covered key organizational departments. For instance, the HR department was assumed to perform an operational role rather than a strategic role. HRM specialists can serve as mediators, they also can devise innovative solutions, and adopt proactive solutions to avoid labor relations disputes (Zamco, 2014). At ASE, the HR department was treated much like a service unit, as it mainly documented and communicated downward regulations, HR messages, or decisions

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related to employee contracting arrangements, because the top management had full consolidation over labor issues. Furthermore, top managers did not want to correspond openly with employees regarding decisions related to their promotion, contract type, and duration, etc.... Therefore, the HR department was in charge of communicating such resolutions taken by top managers, to each employee, without receiving explanations about the entity's status to assess and defend those cases when appropriate. Consequently, it was put in a situation where it was perceived as a black spot where it should invent solutions to deal with employee retaliation. Additionally, the HR department was strongly criticized by the labor union as it failed to mediate the tensions, and sometimes it was judged to be the management's ally.

I do believe that most employees are discontented from the HR department, and I don't blame them, in fact, the HR department was excluded from being engaged as a strategic partner in managing this tremendous change, it was treated like a messenger, and had no authority to question managerial decisions. (Manager 1)

CONCLUSION

Conclusively, the context of this artifact governed two interrelated challenges of managing employee relations and *bipolar tension* that subsist at ASE higher education institution. Post reverting, envisaging, and analyzing the roots of the endured conflict between ASE's labor union and top management, a paradox of dualities listed disclosed a finite set of major unresolved tensions. The concentration of privileges on merely one side of the pole has translated negatively upon the entire institution, as is clear in the morbid relationships between the management body itself along with other bodies that fall under, including but not limited to: employees, labor union, and others. As the organization is pivoting towards commercialization, managing dualities became complex due to opposition in an environment that doesn't support healthy communication. The management demonstrated clear apathy towards its units through the negligence of commanded basic rights of job security, employee contracting, promotion procedures, pay issues, and health/safety conditions as it inflicts with its gains. This was a tangible result of diverting from the extrapolated core of the institution; a 'managerialist ideology' and a 'reductionist stance' had been taking whenever it was dealing with labor demands. Ultimately, the management of those bipolar pairs is the key to grasping the complexities and dynamics of the prevailing situation of overt resistance by both sides. The perception of fair employee relationship management while grounding the theory of healthy communication and use of language will yield a significant change in the overall quality of the

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organization, as it will directly affect the core assets which are the human resources positively in a means that safeguard against elevating organizational tension at ASE.

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KEY TERMS AND DEFINITIONS

Autocratic Leadership: Is a leadership style where the leader imposes strict authoritative control over his/her followers, rarely seeking their input or feedback, and takes all decisions based on his/her own judgment and perception.

Employee Relations: An organization's attempt to prevent and resolve any problems, tensions, and disputes between management and employees to maintain a healthy and a positive relationship.

Higher Education Institutions (HEIs): Organizations providing any sort of postsecondary education and those awarding academic degrees or professional certificates, including, for example, universities, vocational and technical colleges, community colleges, and other collegiate-level institutions.

Labor Union: The body that represents the collective interests of workers at an organization, its main responsibility is to bargain with employers over employee concerns basically over concerns such as wages, contracts, and working conditions.

Managerialism: An ideology that awards high trust and legitimacy to professional managers as the formal body that can exhibit effective management under the various organizational settings. Such an ideology emerged in the corporate sector and is now transcending to other organizational forms such as the public and civil organizations in the form of 'New Managerialism'.

Organizational Dialogue: A stream of collective meaning flowing through and between members of a group or an organization to extrapolate on assumptions or judgments.

Theory of Communicative Action (TCA): A theory created by the effort of the philosopher Jürgen Habermas, where he tried to find a way to ground social sciences in a theory of language and later used it as the basis of his theory of morality, democracy, and law.

Chapter 11
A Critical Narrative of Employee Well–Being and Control Paradox in Higher Education

Nirupama R. Akella
Wichita State University, USA

EXECUTIVE SUMMARY

The case presents a detailed snapshot of a staff employee well-being initiative developed and implemented by the Human Resources (HR) department in August 2014 at the Online Learning Unit (OLU) of J.M. College located in southwestern Georgia. The case is an auto-ethnographic account of how implementation of an employee quality of life (QOL) initiative combined with surveillance techniques resulted in a negative toxic culture of employee resentment, hostility, and poor performance. Using modern surveillance theories of synoptican, actor-network theory (ANT), and surveillance capitalism, the case shows how the original Foucauldian theory of panopticon has re-invented itself into a panopticon of technology dominated by a culture of capitalism and profit-maximization. The case uses pseudo names to protect privacy and maintain confidentiality of the institution and characters. The case accurately details events in a chronological manner focusing on the main character's thoughts and actions.

INTRODUCTION

This case uses a post-modern critical theory of surveillance as an appropriate lens to explain and study the complex topical phenomenon of implementing employee quality of life (QOL) initiatives.

surveillance is a new form of capillary extension of disciplinary power that invest, colonize, control… nothing vanishes… surveillance is a return of the camp and the panoptic… (Crampton & Elden, 2007, p. 257)

The issue of electronic surveillance as employed by HR in J.M College identifies as a power space that uses surveillance cameras as sources of "*panoptic technology*" and power (Koskela, 2000, p. 243). Surveillance systems of CCTV cameras and audio systems ensure that the employee is on guard and alert all the time. Building on concepts of the *synoptican* described as the authority and control of one voice over many voices; surveillance theory encompasses a fluctuating continuum of overt power and discipline to modify behavior for increased productivity and performance (Mathieson, 1997, Simon, 2004). Surveillance in HEI has extended to employee's personal life upsetting work-life balance. Employees sacrifice personal time for office activities and get-togethers (Jackson & Mullarkey, 2000, Parker, 2003, Crampton & Elden, 2007, Chi & Lin, 2011). The theory shows how employees under constant surveillance and monitoring succumb to feelings of negativity, suspicion, and apathy. At J.M College, the feeling of being constantly watched and monitored intensified employee resentment and hostility towards the organization. The effect of continuous surveillance led to optimal efficient performance but developed a negative hostile organization climate and culture. Surveillance is thus a coercive and technological method for controlling and disciplining workers, but it is also a political process of domination where a few hold the reins of resources and positional authority seeking to dominate multiple voices in lesser positions. At J.M College, the resources and authority lay with the executive leadership i.e. the college president and the Human Resources department leading to spiraling development and prevalence of the dominant voice and marginalization of staff and faculty voices about quality of life.

Surveillance theory in HEI is a broad umbrella encompassing post-Foucauldian theories of actor-network theory (ANT) and surveillance capitalism which use constructs of the original Foucauldian theory of the panopticon, power, and discipline.

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ORGANIZATION BACKGROUND/ CASE STUDY BACKGROUND

Established in 1897, J.M College is a liberal-based two-year degree college located in south-western Georgia. With campuses in five cities across the region, J.M College was recognized in 1950 as a 'military' higher educational institution (HEI) offering associates degrees, audit programs, and preparing students for transfer and enrollment in four-year degree colleges across USA. Accredited by the Southern Association of Schools and Colleges, the college offers three primary bachelor's degree programs in Arts, Science, and Applied Science ranging from business management, supply chain management, logistics, education, communication, and English. With over 65,000 student enrollment figures, the college has robust components of military, and online distance education audit, badge, certification, and diploma courses. Its associate degree programs range from education, all S.T.E.M. (science, technology, engineering, and math) programs, criminal justice, social work, nursing, history, and communication courses. The college, at every campus, is organized in a three-tiered hierarchy with the college president and senate, followed by full-time, part-time, online, and adjunct faculty who form the faculty assembly body and debate on issues and proposals initiated by the senate. The third tier in the college organizational hierarchy constitutes of support staff and departments such as admissions, payroll, housing, and human resources. The departments of military education (ME), and Online Learning Unit (OLU) are viewed as part of the third tier for logistical payroll purposes. Both departments function independently as micro organizational divisions within the college. The departments employ separate online faculty, instructional designers (ID) and information technology (IT) personnel, admission counselors, recruiting agents and marketing professionals. The ME department includes Reserve Officer Training Corps (ROTC) and junior ROTC programs with relevant education components for school and college preparatory courses. With an annual enrollment of 15,000 students, OLU offers global online degree programs through distance learning solutions, and online bachelor's degree programs to US military airmen in partnership with Air University. Known as JMC-AU-ABC program, OLU develops, designs, and delivers bachelor courses in supervision and management, supply chain management, and logistics.

A Timeline

J.M college has an aggressive Quality Enhancement Plan (QEP) initiated to develop and streamline institutional efficiency and quality with global education and learning trends of state curricula and instructional technology. In Spring 2013, the program stake holders identified five core competencies of critical thinking, oral and written communication, teamwork, and information literacy. In November 2013,

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the college had a new president-a retired lieutenant general who sought to increase productivity, quality, efficiency, and effectiveness in terms of student enrollment, curriculum development, staff efficiency, faculty superior research, and constant improvement to instructional technology as communicated to college employees in staff and faculty general assembly held in December 2013. In January 2014, QEP team shifted its focus to a dual purpose of developing its core competencies among students and staff. In the same month, the Human Resources (HR) department issued directives to faculty to participate, attend, write, and publish academic research in scholarly journals. The department also conducted trainings in instructional design, curriculum development, ethics, and culture, and learning management systems (LMS). It developed and implemented aggressive hiring, retention, promotion, and firing practices.

A Changed Organizational Climate and Culture

J.M college fostered a campus culture of competition, deadlines, and fast-paced performance. Its mission reflected a motto of speed and efficiency to deliver and produce consistent quality optimal student enrollments, profitable return on investment (ROI), curricula design and implementation supplemented with feasible instructional technology. The organizational culture was a highly pressurized environment that expected high quality performance every day. A climate of surveillance capitalism was encouraged where each employee was identified as a performing machine, and where the college leadership was not concerned or interested in fulfilling, and furthering needs of its employees. This kind of profit-oriented organizational climate threatened prior existent cultures of employee trust and welfare. The strategic initiatives released and propagated throughout the college reinforced the system of surveillance capitalism where employees were considered as sources of profit-making. The initiatives of maximizing profit through increasing student enrollments ensured a culture of efficiency lacking in basic humanness, empathy, and people interaction. It cemented a negative culture of low employee morale, rising employee dissatisfaction, and apathy. It slowly became a toxic organizational culture where climate strength was driven by profit maximization and not a dual purpose of employee welfare leading to growth and productivity.

New Leadership/Management Style

The new college president had a bureaucratic management and organizational style of top-down management, one-way communication, minimal interaction with faculty and staff. A decentralized academic advising model was implemented with each college having its own advising philosophy and procedures. However a centralized

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system of HR management and development was followed where policies, procedures, and initiatives originated in the office of the college president and filtered down to HR who disguised the controlling procedures in the guise of employee welfare and development initiatives to secure employee-buy in and support. Thus, though the college had a seemingly open and employee-oriented climate combined with a flexible communication, hierarchical structure; the reality was different. The college fostered an autocratic leadership and management style where employee voice was marginalized. Surveillance methods of electronic CCTV cameras were adopted and installed in each department to ensure rigid total compliance with the new college mission of" *'developing, implementing, and delivering quality learning solutions to large number of students continuously ensuring maximum performance and productivity in terms of financial growth and student enrollment numbers."*

SETTING THE STAGE

OLU

OLU continued to function independently with a staff of 25 that included the online dean, instructional design (ID) director, online education director, one entry-level instructional designer, ten admissions and information technology (IT) personnel. Though functioning as a centralized flat team, the online dean was identified as the designated responsible authority who communicated with the college president monthly. The online dean worked in conjunction with the ID director and online education director to develop, design, implement, evaluate, and revise online course offerings on learning management system (LMS) Moodle. The ID director, a veteran ID professional who had been working at J.M college for 25 years supervised one ID and the IT team. The function of the ID employee was to conduct root cause analysis, develop and write courses in teamwork with faculty subject-matter-experts, input appropriate instructional technology, conduct pilots, revise, and implement courses for students. The IT personnel worked on instructional technology software and were responsible for LMS operation, maintenance, and constant updates. The online education director worked with the ID director to develop online relevant curricula aligned with state core standards. Admission staff comprised of admission recruiters and counselors who helped online students register, enroll, complete financial aid, troubleshoot LMS problems, and record all online student activities.

In Fall 2014, HR introduced and implemented a four-month long mandatory program of employee wellness and development consisting of employee weekly picnics, informal gatherings, trainings including mentoring and shadowing, wellness clinics, and home care. The rationale communicated to the online dean by the HR

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Vice-President, Jessie Rogin, was to foster and nurture an organizational climate of employee value, employee engagement, quality optimal performance, and work-life balance. The goal, as advocated by HR was to familiarize employees with the college strategic mission and goal of maximum productivity and ROI while maintaining a caring and responsible attitude. However, the initiative masked a harsh surveillance program with CCTVs and audio equipment installed in every office, corridor, and computer to monitor sand scrutinize employee behavior and action. The employee well-being initiative, thus, when implemented had negative consequences in terms of slow performance, employee absenteeism, employee resistance to working around the clock with constant surveillance and interference from HR.

Context-HR Dual Role in Higher Education

Though firmly established as the norm in corporate and financial sectors, the issue of HR involvement in staff well-being and development in HEI is still open and a nascent field of research with little evidentiary research. A potential reason for the silent role of HR in HEI employee issues could be the dual role played by HR in HEI (Guest, 2017). HR was essentially considered as a regulatory measure ensuring appropriate student documentation, delivery, implementation, and design of learning systems in alignment and compliance with state and federal laws (Ho, 2018). Students were viewed as consumers and internal stakeholders who demanded and consumed learning solutions. The function of HR, thus, has been surmised as the satisfaction of student demand and consumption. But, at the same time HR was also tasked with employee engagement, performance management, employee payroll, recruitment, promotion, and retention. A main strategic goal of HR has been helping the HEI function speedily, faster, more efficiently continuously (Veld & Alfes, 2017, Babnick et al., 2014). To that end, HR has doubled efforts to create a climate of efficiency that focuses on optimal employee productivity. Thus, HR in HEI has a dual role of satisfying consumer demand for quality learning and ensuring that employees meet this growing demand with a constant supply of learning solutions. To ensure a steady supply, HR invested in improving campus climate by recruiting quality talent and developing a productive and efficient climate through employee quality of life (QOL) initiatives of employee wellness. Maslow's Need Hierarchy theory provides an apt fit to highlight the rationale advocated by HR that an HEI that supported its employees, invested in their well-being values, and appreciated their contributions and efforts was assured of employee optimal commitment, productivity, and alignment with HR values (Wang et al., 2020, Van de Voorde, & Beijer, 2015). Maslow's Need Hierarchy combined with modern critical surveillance theories of action-network theory (ANT) and surveillance capitalism explain the contemporary dual role of HR positing that satisfaction and engagement of HEI

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employees coupled with covert surveillance techniques ensured continuous self-discipline, marginalization of employee voice where employees felt compelled to modify their behavior to meet demands of a caring employer- a steady continuous stream of supply and demand of learning products a (Veld & Van de Voorde, 2014, Crampton & Elden, 2007, Elmer, 2003).

HR Rationale: Maslow's Hierarchy of Needs

There are five categories of needs in increasing order of importance that direct and influence human behavior and action. HR practitioners in HEI used this hierarchy to argue that employees must work at optimal efficiency for long hours at personal cost as the employer i.e. the HEI was taking care and providing for safety, psychological, esteem, and actualization needs of the employee (Huitt, 2007). The HEI fostered employee engagement, provided for professional development, employee well-being and development thus fulfilling higher-order developmental needs of the individual.

HR Initiative: Employee Well-being/Wellness

Identified as a focal aspect of organizational culture, employee QOL (quality of life), employee well-being is a multi-dimensional aspect that encompasses the five categories of Maslow's Need Hierarchy (Clinton & Van Veldhoven, 2012). The five categories include satisfaction of employee basic physiological needs, safety needs of comfort, security, and belongingness. Employee well-being focused on employee happiness, value, self-efficacy, and health i.e. absence of stress, making personal connections, and maintaining sound physical health (Grant et al., 2007). The development, direction and speed of implementation depended on focus and character of organizational leadership (Schein, 2010). This was apparent in the case of J.M college where the new leadership changed direction of the college climate and culture fostering a culture of efficiency, employee negativity disguised in employee QOL initiatives. At OLU, HR disguised the program of employee well-being with rigid surveillance tactics leading to continuous scrutiny, monitoring, and control of employee behavior and action. OLU employees had to work longer hours at personal cost to align themselves with the college mission, and to ensure a steady supply of quality learning solutions.

CASE DESCRIPTION

Nina Brown, the 30-year old instructional designer at OLU since 2013 scanned the department notice board outside the reception on her way to her own cubby-sized

office. She saw a directive from HR posted on the board—HR was organizing a picnic for the OLU employees on Sunday at 10 a.m. and everyone had to sign up or face disciplinary action. Nina sighed—ever since HR had implemented the four-month long mandatory wellness and development initiative last month i.e. August 2014, the department had lost its friendly, and open atmosphere, and become a hotbed of hostility, resentment, negativity, and suspicion. Work pressure had increased and now everyone had to justify their behavior, and action in writing to the HR representative responsible for their department. HR simply did not understand how OLU functioned-sometimes they had too much work and sometimes they had little. For instance, admissions counselors did not speak to prospective students every hour of every day! Sometimes they had to cajole, reassure, and establish rapport with a prospective student during course of many calls. Thus, sometimes they recorded recruiting just one student over a period of two-three days. But it did not mean that an admissions counselor was not doing their job.

Even in her own case, sometimes she had many courses to design, develop, and implement. Sometimes her only responsibility was doing evaluative surveys for a week. But it did not reflect on her work performance leading to disciplinary action. And this mandatory wellness program included surveillance tactics! In every office there was a hidden camera recording every move of all employees and it was irritating and frustrating. The wellness program was not at all fostering employee wellness. Instead it had, become a harbinger of employee growing discontent of being watched and monitored all the time.

Why have an office picnic on holidays when people relaxed at home with their families? She did not like this—last week only she had twisted her ankle rock climbing during an office outing. All these activities, Jessie Rogin, the HR vice-president had said was going to develop, nurture, and increase employee camaraderie and support for each other. What HR had not mentioned was the constant surveillance that came with the wellness program. Nina sighed—the wellness program coupled with the surveillance techniques was slowly eroding quality performance and leading to a culture of distrust, unhealthy competition Contrary to HR views, the wellness program had only led to depression, unhealthy competition. Sure, everyone in the office now worked constantly to ensure that they were fast, efficient because the minute they relaxed and took time off or even had a long break; HR would immediately issue them a written warning. HR was always watching, monitoring each one of them. What did they do every single minute they were in office?

"What is it now," said Tiffany Stuart, an admissions counselor frowning. "Picnic on a Sunday… I had planned to clean the house and just relax in my pjs. I don't think I will sign up."

"You have to," said Nina, "otherwise HR will file a formal complaint and your job will be in trouble."

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Tiffany scowled and continued, "We already have monthly trainings, why do we need weekly trainings? And why do we have to go jogging around the campus every day of the week?"

"It's wellness," said Nina nodding her head towards the tiny audio set snuck in the corner. This was the last straw, thought Nina—they were now subject to electronic surveillance all the time like prisoners in an invisible glass office! Even their office computers had been fitted with surveillance apps.

"It's not fair," whispered Tiffany, "If I complain, I'll get fired and I need this job…"

Nina nodded-she knew how Tiffany felt! She, herself felt so unsure about her job, her role… she felt scared just suggesting or even asking the faculty subject-matter-expert (SME) to discuss course content… she could get called by HR for being slow and not completing the course design fast!

She waved at Tiffany and walked back to her office still mulling over the increasing problem! Her director, Dr. Sonnier had complained to the online dean and to the college president about the negative environment caused by the program. She had been invited for an informative discussion with Jessie Rogin and the college president and had been shown the door. Dr. Sonnier, who had started her career at OLU, 25 years ago had been fired and would be leaving month-end. Nina sat down and opened her email. She had to go to the picnic even though she did not want to! She did not want HR interfering in her personal life- telling her how to exercise, eat, dress, and behave under the guise of employee wellness! The root of the problem was the college president and his leadership/management style or lack of them. HR also had a problem and instead of questioning the merit behind the college president's values, and HR programs, the faculty and staff assembly members had not engaged in open dialogue. They should have communicated to HR in writing that before developing and implementing such programs, they (HR) should consult and collaborate with the employees. Such an action would have ensured a positive response and immediate success of HR programs. Perhaps HR could have conducted employee climate and attitude surveys and focus groups to record employee voices and gauge their mood! Constantly watching and monitoring employees was not helping the college at all. Everything was now super-fast but quality was suffering. Earlier, before implementation of the program, she would take a month to develop and design a course, have many meetings with faculty and IT and pilot the course after two months of designing, feedback, and revision. But now she was designing a course in a week without piloting, feedback, and revising the course. Quality was suffering-Nina mused. People were enrolling in courses but dropping out of the college due to poor quality of courses. Yes, student enrollments had increased but so had student dropout rates, and staff/faculty turnover!

She wanted to switch off the computer and run out screaming. She was a professional and did not need this constant scrutiny of every minute activity. It was

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like an invisible incendiary mind control action, and not employee welfare! She knew that she and everyone at OLU was not performing their best because of the constant surveillance.

Nina bit her lip—what should she do? She could not confide in anyone at office anymore-she did not trust anyone, and HR was ALWAYS watching and listening. She felt like a prisoner encased in a glass prison with HR watching through electronic eyes-- waiting for her to do something wrong! The climate at J.M college was slowly becoming toxic.

PROBLEM/DILEMMA AND CHALLENGES FACING THE ORGANIZATION / INDIVIDUAL

Employee QOL practices are common HR practices developed to increase employee productivity and performance. However, the positive employee oriented QOL program can turn negative and toxic if combined with methods of surveillance that monitor, control, and discipline employee behavior and action all the time in the office (Jackson & Mullarkey, 2000, Parker, 2003).

The problem described in the case describes this negative consequence of an employee QOL program which was supplemented with incendiary surveillance techniques. Employees at OLU department at J.M college had to acquiesce and follow a four-month long mandatory program of employee well-being and development masking severe surveillance methods implemented by HR. Instead of developing employee wellness and satisfying higher order needs as indicated by Maslow's Need Hierarchy, employees experienced negative feelings of depression, low self-esteem, hostility, and suspicion caused by a harsh surveillance protocol.

Work pressure intensification due to the constant surveillance monitoring employee behavior and function to oversee employee productivity, efficient continuous performance, and interaction led to unhealthy competition to be faster, more efficient sacrificing quality learning production. This adverse consequence of the program led to slow/poor, and low performance, and an increasing toxic climate and culture. Harsh disciplinary actions of HR towards any employee who questioned merit of the program also increased employee absenteeism and turnover as OLU employees left their jobs or transferred to other college departments. Many admission counselors such as Tiffany Stuart transferred to the library. The online dean left J.M college and took a job at another university. The ID director, Dr. Sonnier left and was immediately hired by another major state university as a senior instructional designer. The online education director also left the job for another similar position at another university. Many IT personnel transferred to the strategic leadership team.

Nina continued in her position experiencing feelings of low self-esteem and negative self-worth. Her work performance and style of working was criticized as being *'unproductive and poor.'* In October 2014 Nina had less work due to finishing all her assignments. She surfed the Internet for potential ID scholarly calls for publication which was recorded as *'slacking at work'* and not scouting for future research opportunities and professional development. Nina was called to HR office and issued a written complaint. She was shaken up and depressed. She felt unsure about her job description and function at OLU. Moreover, she felt lonely, suspicious, and frustrated as her mentor and former supervisor, Dr. Sonnier had left. She could not confide in anyone due to fear of being watched and heard all the time. HR would find out and this time fire her.

Salient Issues/Challenges

a) Role of HR

HR began its endeavor at OLU with the employee wellness and development program and fostered a negative environment including high employee turnover at OLU. At the same time, it initiated surveillance techniques of CCTV and audio devices that monitored and recorded employee behavior and function all the time during office hours. This constant surveillance and scrutiny propelled employees on edge leading to behaviors and actions of depression, minimal interaction, and communication. However, this aligned with HR goal of streamlining organizational processes to achieve and maintain efficiency, speed, and optimal performance. The programs aligned with a increasingly toxic and negative employee culture and climate of surveillance capitalism where the emphasis was on 'achieving more with less' and ignoring employee welfare and relations. HR, hence, accomplished a dual role of disguising employee welfare practices with controlling surveillance methods.

b) OLU Culture

The office culture at OLU slowly became toxic and negative where focus was on efficiency and speed at the expense of employee relations, humanness, and trust. The constant surveillance and monitoring systems developed to *'keep an eye'* on employee welfare had a controlling effect. It developed a group of people who were suspicious and did not trust each other. The spirit of efficiency developed a culture of competition, reward and punishment creating an unhealthy employee environment. It sacrificed employee civility, decency, empathy for feelings of resentment and degradation where employees turned against each other for a reward. Employees did not feel a part of the college experiencing loss of self-efficacy, and self-worth, as

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highlighted in the case of Nina. They felt afraid to speak out for fear of punishment, as in the instance of Dr. Sonnier.

CONCLUSION

A mandatory four month-long employee wellness and development program was implemented at the OLU at J.M college by the HR department in August 2014. The program comprised of informal picnics, gatherings, weekly trainings, physical activities, wellness clinic, and continuous monitoring and surveillance through video and audio systems. The wellness program with its surveillance method spread a climate of negativity as employees felt pressured and bounded to be efficient and fast in their work all the time. In case of questioning and non-compliance harsh disciplinary measures were implemented by HR. The initiative led to development of a toxic efficient culture built on principles of profit maximization. The program increased poor performance, employee go-slow behaviors, unhealthy competition, and uncertainty. Nina's supervisor, ID director, Dr. Sonnier was fired as she questioned program merit. Nina, herself, was nervous and worried about her job and function at OLU. She wondered what to do.

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KEY TERMS AND DEFINITIONS

Employee Quality of Life (QOL): It is defined as the level of satisfaction regarding activities performed and the corporate environment to promote a sense of security and personal and professional development among its employees.

Instructional Design (ID): It is defined as the systematic development of instruction using learning and instructional theory to ensure the quality of instruction.

Maslow's Need Hierarchy: It is a psychological theory used to explain human motivation. It identifies human needs into five categories and states that humans tend to seek fulfillment of higher order needs of esteem and actualization when lower order needs of physiological are fulfilled.

Organizational Climate: It is a perception dependent on a value judgment which can vary greatly from person to person and impact productivity, motivation, and employee behavior.

Organizational Culture: It is defined as expectations, experiences, philosophy, as well as the values that guide employee behavior and action.

Surveillance: It is defined as coercive, technological, and political method for controlling and disciplining workers for gaining control, profit, and power leading

to prevalence and popularization of dominant voice, employee poor performance, productivity, resentment, and toxicity. It is also described as modern-day panopticon.

Surveillance Capitalism: It is defined as modern information capitalism that depends on complete and successful implementation of surveillance techniques. The goal of surveillance capitalism is profit maximization and disregard for human relations.

Section 4

Critical Perspectives in International Human Resources Management

Chapter 12
South African MNCs and HR

Geoffrey Wood
Western University, Canada

Christine Bischoff
University of Witwatersrand, South Africa

EXECUTIVE SUMMARY

This chapter explores how three South African MNCs ventured north into Africa and what this meant for their practice of HRM. The chapter highlights how each company developed their HR systems under late apartheid, and how they have been adapted since then. It explores what their investments meant for local firms and for workers more generally in their countries of operation. Two of the three firms have placed a strong emphasis on internal HRD and human resource planning orientated towards developing the careers of their staff up to senior management; the third has followed a more mixed model that has not been without controversy.

CASE BACKGROUND

South African retail and manufacturing MNCs have braved the African continent and have been able to maximise on the location, have the benefit of being able to leapfrog from a comparatively big home market and are familiar with the physical and cultural African milieus (White et al., 2019). They have also provided the basis for decent work in a context where there has been a general decline in the proportion of regular decent work since the 1980s, and with this, the area where HR can be practiced. HR as practiced by South African MNEs in Africa has been not without controversy, given the country's racial past, but, has not attracted the same degree of controversy as, say, Chinese (Parente et al, 2019) or Australian MNEs

(Somervile and Green, 2017) across the continent. There are some success stories but at times, the MNCs have not been sensitive enough to local conditions and the needs of people, which is a result of the years of development within the restricted, parochial and secluded environment of apartheid South Africa.

Post the democratic transition in 1994, South African MNCs have extended their reach into the rest of Africa. Briefly, South Africa's relationship with the continent had been complex. The southern African region was the site for the supply of raw materials and it provided labour for the South African mines (Bank, 2019). The latter was due to the desire by the mining houses to keep wages down, given the high costs of deep mining. During this period, South African MNCs were active in Namibia, Botswana, Lesotho and Swaziland, in a range of areas from retail to light manufacturing.

Under apartheid, South African companies operated covertly further afield notwithstanding the fact that there were sanctions imposed on South Africa. Some South African businessmen had relationships with the ruling elite in many African countries. For example, colourful businessman Chris Hellinger leveraged roving activities as an earthmover salesman with the securing of lucrative concessions (ranging from waste removal to a casino) in Angola and Sao Tome; in return, he embarked on a number of social development projects in the latter (Frynas et al, 2003. However, most of his activities proved transitory, and had little lasting effect on job creation across the continent. This was also true for many other South African businessmen operating in Africa under apartheid. Post 1994, the African National Congress came to power and reinstated South Africa's status in Africa, which unlocked additional opportunities for South African MNCs, job creation and the rolling out of HR systems.

In the post apartheid era, a number of areas of industry have managed to secure export success, ranging from motor cars to wine (Wood and Bischoff, 2020). However, other areas have battled to cope with cheap imports, most notably clothing and textiles (Wood and Bischoff, 2019). The latter industry has seen major job losses, and has bifurcated between rural sweatshops and a few high value added niche producers (ibid.). There is a large and progressive body of employment regulation legislation; however, whilst the system works quite well for larger and established employers, it remains more honoured in the breach by many smaller employers and the informal sector (Wood and Bischoff, 2020). Finally, the government has battled to manage corruption, and in a policy malaise has set in; with this has come pessimism (Sebake, 2020), and there has been a drift of capital abroad to offset risk. Yet, some firms have moved into even riskier climes in tropical Africa, taking with them HR models that have proven effective (c.f. Wood and Bischoff, 2020).

Three stage theories of internationalization highlight that in venturing abroad, firms have to overcome the liability of foreigness, and face upfront set up costs

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(Contractor et al., 2019; Contactor, 2007). In phase two where the firm expands further internationally, it can learn from past experience, leading to incremental benefits that are greater than the costs; this does not mean that the challenges of settling in to a new market go away, they are just easier to manage. They furthermore have benefits of operating at a greater scale and scope, can obtain resources from the most cost effective are of operation, and can offset risks (Contractor et al., 2019; Contactor, 2007). However, in the third stage, the operation becomes over extended, and faces the challenges of coping with excessive cultural and institutional diversity in the markets it operates in (Contractor et al., 2019; Contactor, 2007). The mixed experiences of all three cases illustrate the challenges at each of these phases.

SETTING THE STAGE

SAB-Miller: Expansion, Jobs and HRD

In 2016 SAB-Miller, founded in 1895, was bought by Anheuser-Busch InBev. The US/Miller side of the operations was soon sold off, leaving SAB (South African Breweries as a division of the latter and its Africa hub (Bamber, 2019). This followed decades of global expansion by then South African MNE, although the combined firm retains a strong African presence. Breweries have provided a durable source of regular decent jobs, and a space where HR can be practiced, across the continent, primarily because beer is mostly water, and hence, local production has a built in cost advantage given transport costs. Local beer producers serving consumers who are poor, look for ways to save money. An effective cost-saving method is the return of bottles through a deposit system and this has succeeded across Africa; bottle returns even function in warn torn Democratic Republic of Congo (Wood, 2015). SAB-Miller accomplished alongside almost creating a domestic monopoly and preventing local and international beer companies from entering the South African market, by employing price wars, for example, to force out the competition (White et al, 2019; ibid.).

Importantly, SAB applied its business model into Southern Africa initially in 1910, when it founded the Rhodesian Breweries (in current Zambia and Zimbabwe) and in 1969, it launched Swaziland breweries as a wholly owned subsidiary. Following this, it started breweries in Botswana and Angola in 1973 (and subsequently withdrew after the country's independence) and in 1977 and 1980, it was part of joint programmes to institute breweries in Botswana and Lesotho, in collaboration with national governments seeking to create jobs.

Once apartheid ended, SAB-Miller spread out into markets that had been inaccessible through acquisition of local brewers (Kahn 2011; Klein and Wocke

2007; Ewing 2008). These acquisitions were typically followed on by the introduction of more modern production systems and HR practices (White et al., 2019). It went back into countries it had left before 1994 and it managed to steadily expand its share in Tanzanian breweries. In 1997, it had procured a 40 percent share in Nile Breweries and by 2002 it had full control (Wood, 2015). Acquiring breweries in Beira and Maputo in Mozambique in 1993 gave it a near monopoly. In Botswana it secured a majority stake in the national brewery in 2001 and in 2011, it had realized full ownership of the ABL brewery in Ghana (SAB-Miller 2013). For Morocco and Algeria, it reached an agreement which developed into joint ventures, with the French brewers, Castel. It has a 36 percent stake in the Delta Corporation in Zimbabwe(Delta, 2013).

In 2002, SAB bought US brewer Miller from tobacco firms Philip Morris and it set up SAB-Miller, which facilitated its access to the US market Kesmodel et al 2007; Klein and Wocke 2007), acquiring mature brands and the necessary knowledge to work in developed markets (Gaur et al. 2001). Subsequently SAB-Miller took ownership of brewing companies globally, ranging from China to Czech Republic (Wood, 2015). Although it could not implement its African model (due to various restrictions) it was effective (Larimo et al. 2006). However, SAB-Miller maintained its focus in Africa (Kahn 2011; Klein and Wocke 2007), applies its local production/ reuse/ monopolistic model mostly in Anglophone Africa and accesses the Francophone markets via joint ventures (SAB-Miller 2013; Wood, 2015). SAB- Miller promotes 45 beer brands throughout the market, extending into the premium and the budget brands and in the case of the latter it seeks to oust traditional home brewers (Marketing Week 2011). However, by providing significant local employment and buying local brands, it sought to avoid being condemned as an outsider (Boso et al, 2016).

In return, SAB-Miller has provided and protected jobs and its investment in breweries has greatly helped countries that experienced many years of under-investment; again, it has a good track record in terms of Human Resource Development (HRD), compensating for shortfalls in national training systems. Under apartheid the company lead the way in the provision of equal opportunities and productively deployed this policy in new markets – effectively training up existing staff, rather than hiring new ones (Kennedy 2002; Siehl 2001). HRD is closely integrated with HR planning, and with developing internal careers; although initially conceived of as a response to shortfalls in the external labour market, it has remained a core feature of the company's HR systems. It is equally adept in limited markets at marketing and satisfying customer demand (Gaur et al. 2011). New products such as commercial sorghum beer were launched in Mozambique which had previously been the domain of artisanal producers (Africa Research Bulletin 2012b).

To sum, SAB has resolutely preferred the procurement of local brands and brewing capacity, thereby removing prospective local competition, instead of

establishing greenfield operations; in this sense, fewer new jobs may have been created than existing jobs shored up (Kahn, 2011). The exception to this has been in South Sudan, where then SAB-Miller launched a new brewing operation, White Bull lager, after the country's independence Marketing Week 2011; Business Middle East 2010) expedited by its associations with South Sudanese politicians. In Nigeria and in Angola, SAB-Miller has made a substantial investment in the construction of a greenfield breweries (Africa Research Bulletin 2011; Alinjeyu 2012; Civil Engineering 2010), and in training up locals to work in it, and is contending with the long-established local players in the process.

The SAB model has not taken off in Namibia as Namibian Breweries is in control of the domestic Namibian beer market, fostered by its petitioning of Namibian nationalism and German brewing tradition. Namibian Breweries' unyielding devotion to the German reinheitsgebod (beer purity laws) permitted it to obtain a formidable presence in the South African premium beer market in South Africa (Noseweek 2009) which SAB-Miller have not managed to match despite crafting its own unsuccessful "German style" beer, even though it used extreme marketing and price-cutting (Wood, 2015). SAB-Miller intended to undermine Namibian Breweries in 1992 by co-opting beer retailers to destroy empty bottles in an attempt to disrupt Namibian Breweries's reuse chain (Noseweek 1 September 2001). Faced with the inexplicable decline of its supply of bottles, Namibian Breweries faced imminent ruin (Noseweek, 1 September 2001). However, SAB underestimated Namibian Breweries close ties to the Namibian government, and the loyalty of existing staff and the communities they belonged to. After diplomatic intervention and Namibian government pressure, SAB-Miller terminated the campaign. Regardless, SAB-Miller consequently revealed that it had plans to start a $40 million brewery in Namibia, which further aggravated its relationship with Namibian Breweries (SAB-Miller 2013a). Interestingly, promises of new jobs did nothing to dislodge Namibian's fierce loyalty to their local peers.

Kenyan Breweries thwarted SAB-Miller's attempts to make inroads into the local market. Tusker Lager, a robust brand, along with other brands are resilient and have a sound toehold (Wood, 2015). In response to the failed effort to purchase East African Breweries, SAB introduced the South African brand Castle Lager in the late 1990s. This did not go as planned and the outcome was the strengthening of consumer allegiance to the local player (Wood, 2015). Although, as we have seen, SAB-Miller has played a major role in shoring up jobs across the continent, and contributing to regional skills pools through its strong focus on HRD, and opened up new careers for locals through a strong internally orientated HR planning system. The takeover and sale of the Miller division has left SAB as an InBev subsidiary. Job losses have been slated to make the firm more competitive, especially as micro-brewers have chipped away at its home market.

As can be seen from the above, SAB in Africa followed on its HR model developed at home. This included the relatively labour intensive sits of production close to major markets, a commitment to internal HRD in the absence of national training systems closely aligned to organizational needs, and development of careers within the organization. The latter was and remains facilitated by hostile external labour market conditions, encouraging employees to look to within the organization to develop their careers.

CASE DESCRIPTION AND PROBLEMS

Anglo-American: A Crisis of Progressive HRM and a Retreat From Africa

The Anglo American Corporation was founded in 1917 and soon thereafter secured a major stake in Johannesburg Consolidated Investments (JCI). To maximise profits, legislation governed the movement of black labour which guaranteed the supply of a cheap workforce for the mines. This made for authoritarian, and at times, brutal forms of labour control; basic personnel systems administered pay and ensured compliance with measures restricting the mobilitiy of African labour. At the same time, as the face of English capital, Anglo American faced challenges following the accession of the hardline Afrikaner dominated National Party to political power in. In turn, it accommodated Afrikaner business interests by permitting them to acquire General Mining. In turn, the mining houses were well served by the apartheid system at least up until the 1980s: during the hedya of apartheid, the government progressively increased black labour control and violently curbed labour disruptions on the mines.

De Beers was Anglo's diamond division and attained a monopolistic position over Namibia's diamond fields, as well as substantial holdings in Zimbabwe and Zambia, until nationalization in the case of the latter. South Africa scaled back on the use of migrant labour from the southern African region on mines from the 1970s, turning to domestic labour as South Africa's growing isolation made it harder to recruit across the sub-continent. In turn, this required pay increases. However, modern HR remained elusive, with a continued focus on bureaucratic personnel administration to manage frontline mine workers. However, at middle and more senior levels, by the 1980s, the firm moved towards conventional HR systems. The corporation had diversified over many years, with subsidiaries in other areas of the economy, ranging from motor car assembly to packaging. In the latter areas, employment relations were not nearly as repressive as the mines, and through the 1980s, there were moves towards more pluralist industrial relations, and, by the late 1980s, more cooperative production paradigms.

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Despite generally high levels of labour repression among the mining houses, Anglo-American secured a relatively progressive reputation. This might have partially reflected even worse labour standards among its peers, as well as the firm's championing of a number of domestic liberal causes. In the 1980s, Anglo-American acceded to the recognition of black trade unions on the mines, along with the other major mining houses, but adopted quite a hard-line position in the subsequent 1987 miner's strike, which checked rising trade union power.

South Africa's first democratically elected post apartheid government was led by the African National Congress (ANC). The ANC had initially pledged fidelity to the prospects of mine nationalization but this was abandoned. Anglo-American strategically sold off its shares in its JCI subsidiary to influential black business partners in 1995 (Wood, 2015). However, it gradually became clear that Anglo American was not altogether happy with South Africa's negotiated transition. Already in late apartheid, when more pragmatic elements in the regime had initiated covert talks with the then exiled ANC, a delegation of South African business leaders met the ANC, including the then head of Anglo American, Gavin Relly. Relly concluded that it was not possible to reach a deal with what he viewed as communists at about the same time as elements in the apartheid regime that it was, and shortly did (Adam and Moody, 2012; Wood, 2015).

Anglo loosened its ties to Africa, possibly due to developments in South Africa after the demise of apartheid, when it shifted its headquarters to London in 1999 (Mohamad, 2019). It merged the South African operation with its offshore division, Minorco, and listed on the London stock exchange as Anglo American Plc (Anglo American 2013). What this has meant is that the firm not only lost its status as a South African investor of last resort, but also, it was matched by a gradual decline its role as a provider of large scale jobs. By the late 1980s, South Africa have very high unemployment. As noted earlier, to practice HR, one needs formal sector work, and, over time, this pool in South Africa has shrunk. Not only was this due to many South African firms facing real challenges of competitiveness following the end of apartheid, but also because, many players, like Anglo American, felt that there were much greener pastures abroad (Mohamad, 2019; Sanderson, 2019).

Anglo-American had ventured into other business deals in tropical Africa after 1994. As Zambian copper was privatized in the 1990s, after some years of negotiation, Anglo-American successfully acquired full ownership in 2000 but pulled out in 2002 (Mining Weekly 1 February 2002; Wood, 2015). With the sale of operations such as Bindura Nickels and Zimbabwe Alloys, Anglo American divested itself of its interests in Zimbabwe over 2003 until 2005 (Wall Street Journal 1 November 2012). However, it developed a vast new platinum mine, Unki, from 2003 onwards (Wall Street Journal 1 November 2012), despite criticism from shareholders, UK politicians and human rights groups, and the Zimbabwean trade

union movement(Guardian 25 June 2008; Herald Sun 26 June 2008; Wood, 2015); this deal soon soured. Anglo-American took up a 58 percent stake in the Revebue metallurgical coal project, which is a coking and thermal coal open cast mining project in Mozambique Coal International 2012; Wood, 2015). Anglo-American has embarked on prospecting ventures in Angola and the Democratic Republic of Congo. More recently, Anglo American invested in the Sishen iron mine in South Africa (Morgan 2012) but disinvested itself of Scaw Metals, an important South African steel producer Middelbeek 2012) as well as selling off its stake in the Palaborwa copper mine and smelter (Engineering and Mining Journal 2013). Both the latter were large scale employers that were heavily unionized, and with quite complex HR systems in place. In contrast, the ventures further north often involved highly vulnerable labour willing to work for relatively low wages. Nonetheless, Anglo American conducts high notable community betterment schemes as part of their formal obligation to Corporate Social Responsibility (Rajak 2008). In turn, this may facilitate recruitment and community buy in.

In 2012, the South African Marikana massacre of striking mineworkers exposed the legacy of decades of labour repression, poor wages and working conditions and the traditional role of the mining houses in these exploitative practices. Indeed, Anglo-American possibly misjudged the political mood in South Africa at the end of late apartheid, the persistent controversy over labour practices in the mines, and certainly in Zimbabwe. At the same time, its status as a provider of large scale employment has diminished, and with this, the space to practice HRM. Mohamad (2019) argues that the corporation has become increasingly financialised, that is orientated towards the distribution of shareholder value through the sale of assets rather than the generation of new wealth through the generation of new materials, goods or services (see also, Sanderson, 2019). In any event, as we have seen, Anglo's HR policies varied greatly across its various subsidiaries. Although the corporation had a relatively progressive reputation, recent mining strikes in South Africa have highlighted underlying tensions and long grievances (Bezuidenhout et al, 2020). Although, as is the case with SAB, divisions of Anglo-American have made extensive usage of internal HRD, this has not been matched by SAB's focus on creating or preserving jobs, and there appear to be significantly fewer opportunities for upward mobility in the corporation.

Shoprite

Shoprite has also expanded across Africa without any political challenges (Coetzee et al., 2020). Shoprite is a South African-owned supermarket conglomerate and serves the lower and middle income market in retail. Shoprite is the chain's ordinary low cost supermarket brand largely aimed at middle and lower income consumers; Checkers is

a more exclusive chain targeting higher income consumers with an extensive product line and Usave is a basic supermarket intended for the poor consumers Marketline 2012). OK was an independent chain and manages franchising undertakings in South Africa, Botswana and Namibia - again aimed at lower and middle income consumers. It operates stores focused on furniture and household goods and some stores sell groceries Marketline 2012). The fast food chain, Hungry Lion, targets the lower income brackets and House and Home sells furniture intended for the middle income group (Marketline 2012; Wood, 2015). The core grocery business in South Africa is characterized by high levels of unionization, and quite progressive HR systems that allow employees to build careers within the firm up unto senior managerial level, backed up by training where needed.

The corporation has been most successful at introducing the supermarket model to countries where none or very few existed (Coetzee et al, 2020; Wood, 2015). Shoprite's lucrative models includes homogeneous employment and work organization conditions, pushing down supplier prices, compelling purchasing behaviour and concentrating on daily low prices as opposed to periodic discounts. The ability to create new in-store jobs, and accordingly for the decent HR model it has created, has also created costs for suppliers and indigenous players, and, arguably, the process may have forced down wages and lead to job losses.

In 1990, Shoprite entered Namibia, Zambia in 1995, Lesotho and Mozambique in 1997, Botswana in 1998, Zimbabwe and Uganda in 2000, Tanzania in 2001, Madagascar and Mauritius in 2002, Ghana in 2003 and finally Nigeria in 2005 (Shoprite 2013; Alinjeyu 2012). Shoprite is well-established in Swaziland and entered the DRC in recent times. Shoprite is not worried about risks as it has a vast supply of resources and capabilities (Jacobs and Versi 2012: 45). The Shoprite chain is inclined towards investment in the SADC (Southern African Development Community) nations and has only some ventures in three major Anglophone African nations (Uganda, Ghana and Nigeria). Although SADC is quite heterogeneous, most SADC countries are of common law legal origin, making for some compatibility in how labour issues are approached. At the same time, Nigeria is a very different type of institutional and cultural environment, and opens quite distinct sets of challenges (c.f. Coetzee et al., 2020).

As the chain prefers dealing with existing South African suppliers, due to the fact that they have the capacity to make available standardized bulk supplies, to resource the stores in the various neighbouring countries, this has caused some local anxieties which has the potential to weaken local productive competencies. Added to this, many poor countries with poor consumers have relied on informal traders and barter based systems to provide for basic foodstuffs. Another risk to local industry is the swift spread of Chinese shops throughout Africa (Wood, 2015). These shops sell a broad range of inexpensive Chinese manufactured goods tailored to satisfy the needs

of the poor and compared to the large retailer, and they are have often found a way around local tariffs in a manner that Shoprite have been unable to. The former have tended to make widespread usage of Chinese expatriates even in semi-skilled jobs; contrast, Shoprite has tended to make usage of indigenous staffing at frontline level.

Shoprite's HR paradigm has, once more, revolved around internal HRD to fill skills gaps left by shortfalls in national training systems. However, much of the training is informal and on the job, the expectation that those seeking to develop careers in the firm need extensive hands on experience in practical retail operations, including face to face customer service. However, there are limits on transnational mobility of staff to the centre, even as South African managers can build their experience abroad. This might impose a glass ceiling on upwardly mobile managers from tropical Africa. Shoprite has forged good relations with unions, and this imparts more legitimacy to managerial actions than might otherwise have been the case.

CONCLUSION

In looking at HR systems and broader managerial strategies of the three case study organizations across the continent, a number of common themes become apparent. The first is that in response to the shortfalls in the educational system in South Africa – many elements of apartheid schooling have persisted – all three firms placed a strong emphasis on internal human resource development, with a possible exception of Anglo-American's frontline mining operations. In the case of the latter, an attempt has been made to compensate for this by a focus on community orientated 'good works'.

With this, has gone a strong emphasis on building careers for staff within the organization; the hostile external labour market facilitates retention, at least up until the lower levels of management. The second is that all three organizations have broadly committed to pluralist industrial relations, in response to growing union power in South Africa in the 1980s. At the same time, it is evident that a hard-line ethos persists in the mining industry, as evidenced by responses to recent miner's strikes. This has carried on into their operations abroad, albeit that in many African countries, trade unions are quite weak. In South Africa, there is centralized collective bargaining in specific industries, and although bargaining coverage further north is generally weaker, this has given the firms in question experience in dealing with unions at a high level. In terms of staffing, all three firms have followed a broad model of hiring locals in frontline roles, but with South African expatriate managers higher up in the organization. However, none of the three organizations have faced the same degree of the accusations of systematically racist attitudes among white South African managers as some other South African MNEs.

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At the same time, there are important differences. It could be argued that with its diversification abroad, Anglo-American has gradually disengaged from Africa, and, in turn, this has limited the scale and scope of its role in job creation. In countries with very high unemployment, the space to practice modern HR is limited, and major player's disengaging worsens this problem. Again, both Shoprite and SAB's activities across Africa have often weakened local players, leading to job losses among the latter. Given this, it could be debated as to how much they have broadened the field of HR practice across the continent.

At a theoretical level, it is evident that Anglo-American has never progressed beyond the first stage of internationalization into Africa (Contractor et al., 2019; Contactor, 2007). In doing so, and perhaps surprisingly for a firm that originated in Africa, it has both faced challenges in dealing with new operations in different settings (most notably in Zimbabwe, where its operations were overtaken by political events on the ground), and has been, in view of the perceived upfront costs, risk averse in many others. In other words, it seems locked in the sub-optimal first phase (Contractor et al., 2019; Contactor, 2007). In the case of SAB-Miller in Africa, the firm largely confined its attentions to the familiar environments of Anglophone Africa, with similar institutions, in other words, largely in the optimal second stage of internationalization (Contractor, 2007). Even here, it has run into some challenges in underestimating national cultural sensitivities, most notably in Kenya and Namibia. Finally, Shoprite has ventured much further afield, with its operations in West Africa arguably drifting into the third stage of internationalization (Contractor, 2007), with much greater costs and risks following in its wake (c.f. Coetzee et al, 2020).

AFTERWORD

Many of the challenges faced by South African MNEs venturing up Africa are shared with their local counterparts: shortfalls in local skills bases and in training institution resources; in overcoming the racial legacies of colonialism; and in developing and sustaining HR planning in fast changing environments. Some South African MNEs have developed strong capabilities in internal HRD, and these may be rolled out in new countries they enter, whatever the shortfalls in national training systems. New skills may gradually diffuse across the labour market. At the same time, this may marginalize local competitors (and, indeed suppliers), and, if undercapitalized, the latter may have been much more labour intensive, leading to the new investments by South African MNEs leading to a net loss, rather than a gain in employment. As intra-continent trade and investment deepens, it is likely that there will be a much greater diffusion of different HR recipes across the continent, leading to both the sharing of best practices, as well as challenges in reconciling competing HR cultures.

AFTERWORD

Given that under apartheid, there was a long history of antagonistic labour relations, it might seem that South African MNEs would not be welcome across Africa, and, indeed, that there may be a tendency to make usage of racist practices, given the influences of the past. However, both SAB-Miller and Shoprite have acquitted themselves well in terms of the treatment of their workers across Africa, whilst Anglo-American has progressively disengaged from Africa. Rather, it is MNEs from other parts of the world who have faced controversy in terms of their HR practices in Africa; this would include a number of Australian MNEs.

TWO LESSONS

1. Even in neighbouring countries with common cultural ground, the rolling out of proven HR models in MNE operations abroad may bring with them new challenges. These are not only due to any liabilities of being foreign, but also because local players may be even more adept in navigating the cultural landscape; even if the incoming firm creates jobs associated with 'best practice' HR policies, local stakeholders may be still be critical.
2. The relative feasibility of particular HR paradigms depends not just on national context, but also on sector. It is very challenging for South African mining houses to overcome the legacies of the past, and in successfully implementing cooperative HR systems to replace them. In contrast, the cases of a manufacturing firm (SAB) and a retail one (Shoprite) seem to have made much more progress in developing and rolling out HRD and HR Planning centered HR systems at home and abroad.

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KEY TERMS AND DEFINITIONS

Apartheid: A system in place in South Africa prior to 1990 that centred on racial discrimination on a statury basis governing all walks of life. After a transition period, South Africa moved to a full democracy in 1994.

Collective Bargaining: An employer (or employers) engaging with a trade union (or trade unions) to renegotiate the collective (that is shared) dimensions of employment, a major focus typically being on wage setting.

Expatriate: One working in a different country to one's country of origin on a short-term assignment basis, as adverse to permanent migration; typically (but not always) a skilled worker or manager.

HR Planning: The active planning of careers within an organization.

HRD: Human resource development. The development of internal capabilities and skills within an organization.

Internationalization (of MNEs): A firm moving into a different country of origin to its own. This may be driven by a number of not necessarily mutually exclusive rationales (e.g., market or resource seeking, risk mitigation, etc.).

Multinational Enterprise (MNE): Sometimes known as Multinational Corporation (MNC), a firm that engages in its activities in more than one country. Although many MNEs are quite large, there are many small multinationals as well.

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About the Contributors

Devi Akella is a full professor of management at School of Business, College of Business, Education and Professional Studies, Albany State University, GA where she teaches Organizational Behavior and Human Resources Management at undergraduate and graduate levels. Dr. Akella completed her PhD in 2001 and MBA in 1997 from University of Leeds, UK. Her research interests consist of learning organizations, critical managements studies, workplace bullying and experiential learning.

Niveen Labib Eid is a Lecturer of Management at Birzeit University / Palestine. She holds a Master's degree in Business Administration (MBA) and another Master in Organization Studies and HRM from the University of Essex (UK). She teaches core and advanced business and marketing courses. Niveen has publications in the areas of social enterprise management, social entrepreneurship, servant leadership, strategy, business ethics and social responsibility. She handled different leadership positions at Birzeit University and other Community-Based Organizations and also works as a business consultant and trainer. She delivered over (3000) training hours in various business streams. Her research areas of interest include: Organizational Culture, Critical Management Studies, Critical theory, Social Entrepreneurship, Qualitative Research, Persons Management and Organizational Behavior.

Anton Sabella is a lecturer of Management and Marketing at the University of Birzeit, Palestine. He received his PhD. from the University of Bradford, United Kingdom. His research interests lie in the areas of management practices, entrepreneurship, critical marketing, and corporate social responsibility. In addition to teaching and research, Anton serves as a consultant to a number of local NGOs working in humanitarian relief; the focus of his consultancies is on financial and managerial issues. Anton Lives in the Old City of Jerusalem.

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Tahani Abdallah Abdel-Jawad most recently served as a full-time faculty member teaching various courses in the field of Business Administration at Birzeit University. Previously she led a career in Human Resources spanning over 20 years. She is currently pursuing a PhD in the field of Business Administration. Tahani holds an MS in Business Administration from Central Michigan University where she graduated Cum Laude. She also has authored two pieces of published research in the field of business and continues to propel towards additional research publication.

Nirupama Akella is a doctoral student of Educational Leadership at Wichita State University, Kansas, USA. She is an experienced professional instructional designer having worked in higher educational institutions and healthcare. A published academic writer, Akella serves many journals as a reviewer, as a committee member, and has several chapters, journal papers, and conferences to her credit.

Dāvis Auškāps studied Economics and Business administration at Stockholm School of Economics in Riga. He has conducted academic research about entrepreneurship in Latvia, the effects of terrorism on internationally diversified portfolio diversification benefits and the liberalisation of Malta's economy. As a student at SSE Riga, Dāvis has performed market research projects for local commercial banks and provided management consulting services for digital marketing agencies. He has gained professional experience in the fintech (Creamfinance) and digital marketing (Gemius) industries.As the COO and Co-founder of DoctoWell, he leads projects to digitalize the administrative processes of healthcare institutions. Dāvis' main areas of expertise are entrepreneurship, project management, market research, HRM, CSG, marketing strategy, data analysis and AI.

Michael C. Beers is an Associate Teaching Professor in the Manning School of Business at the University of Massachusetts Lowell. He holds a B.S. and M.S. from Boston University and a PhD from Harvard University. His interests included workplace equity and creating harassment-free workplaces.

Christine Bischoff works as a Researcher at the University of the Witwatersrand, Johannesburg. She holds a PhD from the University of Pretoria and has published widely in journals such as the International Labour Review and Work and Occupations. Her main areas of research are trade unions and employment relations.

Mays Dahadha graduated cum laude from Birzeit University with a Bachelor's Degree in Business Administration (Emphasis: Human Resources Management) and a Minor in Marketing. Aptly, she has been incessantly thriving to grasp the utmost benchmarks in social, educational, and vocational fields; this can be recognized

through her ascendancy in the ample professions she has been occupying locally and internationally in the realm of human resources, communication, data analysis, and marketing.

Jhilmil Das is a senior HR professional currently employed with a premier public sector enterprise under the Ministry of Defence, Govt. of India. She is adept in handling versatile aspects of people management policies and practices across diversified portfolios in global MNCs, large Indian conglomerates and government entities, having contributed immensely towards key transformation and capability building initiatives of human assets across organizations in her career spanning 18 years. Currently undergoing doctoral thesis in the area of OB & HRM from Indian Institute of Management (IIM) Kashipur, she has delivered presentations in various national and international seminars and conferences and lectures at various business schools. Her research interests include change management, culture, innovation, and leadership.

Jason Eliot is an Assistant Professor in the Management Department at the University of Central Oklahoma. He teaches both undergraduate and MBA courses while serving as a coordinator in the College of Business 2B Leaders Program. Eliot spent over 20 years in health care as an employment attorney and human resource professional before joining academia.

Sachin Gupta is currently serving as Assistant Professor in Dept Business Administration . The author has excellent academic records, Ph.D (Business Administration); M.Phill (Business Administration); MBA(Finance); M.Com (Business Administration); UGC-NET; Executive Programme in Advanced Financial Management (XLRI-Jamshedpur); Post Graduate Certificate Programme in Finance (IIM Indore); (Alumnus -IIM Indore); Diploma in IFRS-University of Delhi. He has written more than 50 Research Papers in ISSN/ISBN Numbered Journals and has presented papers in more than 25 National and International Conferences and Seminars. e is continuously engaged in the Research Work. His expertise lies in General Management & all financial subjects. His core subjects are Finance, Entrepreneurship & Innovation, Business & Corporate Laws, Industrial Relations Laws, Business Ethics and Corporate Social Responsibility, Corporate Governance, Corporate Strategy, Marketing Research & Analytical Marketing, etc. Five Ph.D. research scholars have been conferred Ph.D. Doctoral degree in under the guidance of Dr. Gupta and have guided one M.Phill dissertation. Currently, there are three research scholars are working under him as registered Ph.D. students.

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Anju Kamal is currently working as a full time faculty teaching Human Resource Management at Amrita Vishwa Vidyapeetham, India. She has also worked as a Human Resources Professional in IT Industry and has experience in various HR activities from Training and Development, Performance Management, Corporate Communication, Oracle HRMS ERP Implementation, Employee engagement initiatives and HR Audits. She holds a BTech in Electronics from Cochin University of Science and Technology, a Masters Degree in Business Administration and is pursuing her PhD at Amrita Vishwa Vidyapeetham. Her research interests include Organization Management Theory and Organizational Behavior and she is particularly interested in the effect of Platform Sourcing phenomenon on Organizational Communication and Metaphors.

Dmitrijs Kravcenko is Assistant Professor at Stockholm School of Economics in Riga, previously University of Sussex and Warwick Business School. His primary research interests revolve around understanding the sociomaterial effects of collective knowledge and memory on organizations, and on the process of organizing; considering questions such as 'who decides what qualifies as knowledge' and 'how is information and knowledge perpetuated through time'. His secondary research interests are in digitisation of work and organizations (i.e. what happens when people begin working for algorithms, etc.), understanding antecedents of shadow economy, and looking at how managerial practices affect labor productivity. Dmitrijs is an active promoter of podcasts as a tool for education and a medium for critical scholarship.

Vance Johnson Lewis is an assistant professor of management at the University of Central Arkansas, where he teaches "Managing People and Work," "Organizational Politics," and "International Business Communications." He earned his doctorate at Oklahoma State University and postdoctorate at the University of Florida and has research focuses in narcissism, abusive leadership, affect, and management education. He is an active member of the Academy of Management and the Southwest Academy of Management and serves as an Associate Editor for Organization Management Journal.

Dans Rozentāls is a graduate of the Stockholm School of Economics in Riga, class of 2020. He is currently working as a Project Manager at Luxafor where he helps people achieve their full productivity potential with the use of technology. Dans is passionate about photography and design and tries to look for beauty every day. When he is not working or taking photos, Dans is likely listening to music, going trout fishing, or running around the busy streets of Riga.

Rachelle K. Scott is a part-time professor at Albany State University (GA) in the School of Business, College of Business, Education and Professional Studies and has spent her 25-year career in the consumer goods industry. In addition to her affinity for optimizing processes and systems, Rachelle is passionate about growing the capability of people. Through private and non-profit sector engagement, she works collaboratively to identify and eliminate intractable issues to enable value creation. Rachelle holds degrees from Spelman College, Georgia Institute of Technology and Benedictine University.

Manisha Solanky currently pursuing a PH.D. in Dept of Business Administration. Mohan Lal Sukhadia University. The author is NET cleared twice in the commerce stream. The core subject of interest is organizational behavior, HRM, Entrepreneurship, and Marketing. the author has a teaching experience of 4 years as a visiting faculty in MLSU. The author has presented a few research papers in National seminars and contributed chapters for edited books.

Lauren A. Turner serves as the Senior Associate Vice Chancellor for Human Resources, Strategy & Effectiveness, and as an adjunct faculty member in the Manning School of Business, at the University of Massachusetts Lowell. She has served in senior human resources roles in higher education for over 30 years, responsible for overseeing functions including talent management, total compensation, payroll, HRIS, safety and health, labor and employee relations, and organizational development and strategy. She holds an M.A. in Psychology from Mount Holyoke College and a PhD in Leadership & Organizational Studies from the University of Massachusetts Lowell.

Geoffrey Wood is DanCap Chair of Innovation and Head of DAN Management at Western University in Canada, and Visiting Professor at Trinity College, Dublin. Previously, he served as Dean and Professor of International Business, at Essex Business School and before then as Professor of International Business at Warwick Business School, UK. He has authored/co-authored/edited eighteen books, and over one hundred and eighty articles in peer-reviewed journals. He has an h-index of 41, and an i10-index of 163. He holds honorary positions at Griffith and Monash University in Australia. Geoff's research interests centre on the relationship between institutional setting, corporate governance, firm finance, and firm level work and employment relations.

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