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POST-ARRIVAL PERFORMANCE INTERVENTIONS THAT ASSIST EXPATRIATES'
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ABSTRACT

This research examined the relationship between post-arrival performance interventions and the adjustment and performance of North American expatriates working and living in Hong Kong. The focus was on an integrated view of multiple post-arrival performance interventions in order to examine their combined impact. This research provides information to organizations regarding strategies to improve the adjustment and performance of expatriates.

A multivariate design was used to describe the dynamics underlying the dimensions of adjustment and performance by indicating which interventions in combination might be more strongly associated with adjustment and performance. A questionnaire comprised of several existing constructs derived from the extant literature was developed and administered to those listed in the 2009/2010 American Chamber of Commerce Hong Kong membership directory. The interventions examined were integrated cross-cultural training, mentoring, role ambiguity, spouse and family support, and compensation.

Four different multiple regression models were developed. The final general adjustment regression model showed a relationship with spouse and family support and role ambiguity. The final interaction adjustment regression model showed a relationship with role ambiguity, spouse and family support, compensation, and the control variable language fluency. The final work adjustment regression model showed a relationship with integrated cross-cultural training, mentoring, role ambiguity, spouse and family support, and compensation. Lastly, the final

performance regression model showed a relationship with integrated cross-cultural training, mentoring, role ambiguity, spouse and family support, compensation, and language fluency.

The results suggest the importance of multi-national corporations to consider post-arrival performance interventions in addition to pre-departure interventions. Specifically, two primary areas emerged with high significance. First, reducing role ambiguity has a significant relationship with all three adjustment constructs and performance. Second, the findings lend support to the concept of organizations providing additional support to the spouse and family as a means of increasing adjustment and performance of expatriates.

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CHAPTER 1

INTRODUCTION

Technology management is playing an increasingly important role in the globalization of business (Khalil, 2000; Marquardt & Berger, 2003; Li-Hua, 2004; Khalil & Ezzat, 2005; Schilling, 2008). This is particularly clear in the role of human capital in international business, with expatriates representing one aspect of that. The concept of technology needs to be addressed prior to examining the role of technology management and human resource development in globalization. Technology can be defined as the application of human knowledge and understanding to make things that fulfill our needs and desires to perform certain functions (Khalil, 2000; Li-Hua, 2004; Khalil & Ezzat, 2005; Schilling, 2008). From that definition, technology can be thought of as four closely linked components: technique, knowledge, organization of production, and product (Khalil, 2000; Khalil & Ezzat, 2005; Li-Hua & Khalil, 2006). Thus, technology management encompasses the management and leadership in those four components.

With the critical focus on technique, knowledge, and organization, human resource development plays a key role in effective technology management (Khalil & Ezzat, 2005). Human resource development can be defined as “a process of developing and unleashing expertise for the purpose of improving individual, team, work processes, and organizational system performance” (Swanson & Holton III, 2009, p. 4). Technology must be applied and

maintained in an ever-changing, globally competitive environment, which implies a need for a relevant range of human resources and skills (Khalil, 2000; Li-Hua & Khalil, 2006; Friedman, 2007). Specifically, human resources technology can be applied. Human resources technology has been defined as “any technology that is used to attract, hire, retain, and maintain talent, support workforce administration, and optimize workforce management” (Shrivastava & Shaw, 2003, p. 202). Human resource development seems to play a critical role in addressing this need.

Transportation and digital communication have helped to make the world seem smaller, creating an environment for increased globalization (Khalil & Ezzat, 2005; Friedman, 2007). With the rise in globalization, a growing interest in the expatriates used in global operations continues (Takeuchi, Tesluk, Yun, & Lepak, 2005). The interest and attention in the literature has especially focused on the expatriate adjustment process (Bhaskar-Shrinivas, Harrison, Shafer, & Luk, 2005; Harrison, Shaffer, & Bhaskar, 2004; Shay & Baack, 2004) and the various costs resulting from unsuccessful assignments (Fink, Meierewert, & Rohr, 2005). The approaches to studying these processes and issues in the literature vary significantly, with literature in psychology (e.g. Takeuchi, Wang, & Marinova, 2005), management (e.g. Kraimer & Wayne, 2004), international business (e.g. Tan & Mahoney, 2003), cross-cultural studies (e.g. Pires, Stanton, & Ostefeld, 2006), human resource development (e.g. Littrell, Salas, Hess, Paley, & Riedel, 2006), and other disciplines. Within those disciplines, a myriad of studies have focused on factors such as personal characteristics (e.g. Holopainen & Bjorkman, 2005), spouse and family issues (e.g. Konopaske, Robie, & Ivancevich, 2005), cross-cultural training (e.g. Eschbach, Parker, & Stoeberl, 2001), and host-country culture (e.g. Wang & Kanungo, 2004). To further the work in this broad area of research, this study utilized the standards of human performance technology developed by the International Society for Performance Improvement

(ISPI). More specifically, this study examined the impact of a set of performance interventions on adjustment and performance.

Background

Globalization continues to result in a highly competitive environment for international organizations (Marquardt & Berger, 2003; Konopaske et al., 2005; Friedman, 2007). To manage global operations, organizations often use expatriates (Black & Gregersen, 1999; Marquardt & Berger, 2003), and despite alternative forms of international assignments, there is no evidence to suggest a decline in the use of these expatriates (Collings, Scullion, & Morley, 2007).

Additionally, there is increased demand for expatriates in a broader range of organizations beyond the traditional multinational corporation (MNC), due in part to the internationalization of small and medium sized organizations (Anderson & Boocock, 2002) and international joint ventures (Schuler, Jackson, & Luo, 2004). Organizational success is largely dependent upon these global managers (Gupta & Govindarajan, 2001; Monks, Scullion, & Creaner, 2001; Marquardt & Berger, 2003).

Even in the midst of recovering from a global recession, there is an expectation for continued use of expatriates, and potentially slight growth. A large-scale study that surveyed a large sample of firms that collectively manage a global workforce of 5.8 million employees showed an expectation for the number of expatriates to show slight growth in 2010, with 44% of responding firms projecting an increase in their expatriate population in 2010, 44% projecting no change, and 12% projecting a decline (Brookfield Global Relocation Services, 2010). These projections compare to historical averages that showed 60% of firms increasing the number of expatriates, 12% decreasing the number, and 27% not making any changes (Brookfield Global Relocation Services, 2009).

Expatriate Failure

Historically, expatriate failure has been a major issue in the literature, representing a significant issue for MNCs due to the high costs resulting from failure (Dowling & Welch, 2005). The same large-scale study that projected flat to moderate growth in expatriates, also reported that the turnover rate amongst participants was 25% while on assignment and 27% within one year of return, which is double the 13% turnover rate for all employees in the respondent firms (Brookfield Global Relocation Services, 2009). Direct costs include items such as salary, training costs, travel, and relocation expenses, and indirect costs include issues such as damaged relations in the host country, low productivity, and loss of market share. In regards to direct costs, average compensation can range between \$300,000 and \$1 million per year, with early termination of the assignment costing up to \$1 million (Wentland, 2003). The cost of a failed assignment can be five to 10 times the cost of a local hire (Carragher, 2005). Further, industry surveys indicate a low return on investment (ROI) for long-term international assignments, with 70% of organizations claiming an average, fair, or poor ROI associated with such assignments (McNulty & Tharenou, 2004).

The literature seems to suggest that the indirect costs associated with poor or failed assignments are the most significant costs incurred by MNCs. Expatriates who elect to 'stick it out' incur large direct and indirect costs that are often unknown and miscalculated by both the company and the expatriate (Selmer, 2002b). Failure is costly to organizations, including missed opportunities, poor productivity, and diminished relationships that can be more costly than financial expenditures (Storti, 2001). Worse, damage to the organization's reputation in foreign markets is detrimental to the organization's overall international success in particular regions (Schuler, Budhwar, & Florkowski, 2002).

The estimated failure rate in the literature ranges from 3% to 70% (Forster, 2000; Lorange, 2003). However, the failure rate of U.S. expatriates reported in the literature may be exaggerated (Harzing, 2002; Harzing, 1995). Harzing (2002; 1995) questions the reported high failure rates in the US literature, highlighting methodological issues that hinder the reliability of the empirical work in this area. Failure is often defined as premature return in the literature, but premature return may not be the most damaging scenario (Harzing, 1995).

Numerous factors have been attributed to the cause of failure. These factors include technical knowledge, personal adjustment to the foreign culture, family adjustment to the foreign culture, and environmental factors (Cascio, 2006; Oddou & Mendenhall, 2000). Other factors which emerged as significant include the peculiarities of the host environment and the level of support provided by the headquarters (Cascio, 2006; Oddou & Mendenhall, 2000).

Adjustment and Performance

In the literature, scholars have not been consistent in how effectiveness has been defined (Harrison et al., 2004; Ones & Viswesvaran, 1997). The literature has predominately been comprised of two main criteria for determining assignment success: adjustment and return decisions. The literature in the late 1980s and early 1990s tended to focus on expatriate adjustment (Black, 1988; Black & Gregersen, 1991; Black, Mendenhall, & Oddou, 1991). In the 1990s, scholars began to focus on one consequence of poor adjustment: the decision to return from assignment prematurely (Gregersen & Black, 1990; Birdseye & Hill, 1995; Naumann, 1993a). The assumption behind much of the adjustment and premature return literature is that an inability to adjust will result in psychological strain that will “spill over” to poor observable performance or premature return (Shaffer & Harrison, 1998). Conceptually, well-adjusted individuals should have greater resources (time, effort, and emotional investment) available to

support good performance (Shaffer, Harrison, Gilley, & Luk, 2001). The trend from the late 1990s into the 2000s is to look more closely at performance (Caligiuri, 1997; Kraimer et al., 2001; Takeuchi et al., 2005).

Expatriates face complex assignments, requiring them to be flexible and able to adapt their managerial practices to the environment (Jassawalla, Connolly, & Slojkowski, 2004; Feldman & Bolino, 1999; Tung, 1998). The cultural contexts of the international assignments dictate certain actions, since practices in one cultural context may not work well in another cultural context (Black & Porter, 1991; Ralston, Terpstra, Cunniff, & Gustafson, 1995).

Prior research has found that adjustment to the international assignment is tied to job performance (Harrison & Shaffer, 2005; Kraimer et al., 2001; Parker & McEvoy, 1993). Individuals who remain on their assignment, versus terminating their assignment early, may struggle adapting to the culture, resulting in decreased performance levels (Cavusgil, Yavas, & Bykowicz, 1992). Further, expatriates may actually face far more obstacles to good performance on assignment than domestic employees face (Feldman & Tompson, 1992). Adjustment to work has also been found to be a predictor of commitment to the organization (Gregersen & Black, 1990; Florkowski & Fogel, 1999; Lii & Wong, 2008). Similarly, adjustment has also been found to predict job satisfaction as well (Shaffer & Harrison, 1998).

Numerous studies conclude that difficulties adjusting and poor performance are costly, lead to low productivity, and may result in early termination of assignments (Storti, 2001; Kaye & Taylor, 1997; Black, 1988; Tung, 1987). In a longitudinal study, work adjustment was found to strongly correlate to performance (Takeuchi et al., 2005). This is consistent with the finding of a positive relationship between adjustment and performance (Kraimer et al., 2001; Kraimer & Wayne, 2004), showing that expatriates who are well adjusted and interact well with host

nationals receive high performance ratings from supervisors on task and contextual performance. Conversely, poor performance and failures result in significant costs for organizations (Yavas & Bodur, 1999). Further, as the literature on expatriates continues to grow, the literature seems to indicate that adjustment is a critical aspect of the expatriates' ability to meet their organizations' goals and objectives (Caligiuri, 2000; Kraimer et al., 2001; Nicholson & Imaizumi, 1993). The increasing use and need for expatriates in multinational organizations creates an apparent need for continued research on expatriates' performance (Thomas, 1998). However, an examination of the variables impacting the success of expatriates is logical (Brewster, 1997).

Expatriate Training

Three types of training have been defined in the literature: pre-departure, post-arrival, and repatriation (Tung, 1987). Several models of training have been proposed in the literature (Black & Mendenhall, 1989; Mendenhall & Oddou, 1986; Rahim, 1983; Tung, 1982). Numerous studies exist regarding the use of pre-departure training in particular as a means to improve adjustment and performance (Black & Mendenhall, 1990; Gregersen & Black, 1992; Oddou, 1992; Naumann, 1993b). However, fewer studies seem to exist that examine post-arrival and repatriation training. Yet, post-arrival training has been recommended by a few scholars (Eschbach et al., 2001; Grove & Torbiorn, 1985; Prazy & Zeira, 1985). A sequential cross-cultural training program that utilizes various training mechanisms in all three phases has also been proposed (Selmer, Torbiorn, & de Leon, 1998), which is similar to the recommended integrated cross-cultural training proposed by Eschbach et al. (2001).

Statement of the Problem

While the expatriate literature has continued to expand since the 1980s, issues such as retention, costs, failure, and performance, remain a critical concern (Collings & Scullion, 2006;

Collings et al., 2007). In addition to training, other variables impacting adjustment and performance exist, such as compensation and role clarity. However, the existing research studies have examined the variety of job factors impacting performance in isolation rather than as a set of interrelated variables (Feldman & Tompson, 1993). Over the past two decades, this deficiency in the literature has not yet been adequately addressed. A similar call to research conditions, such as support resources, that impact adaptation, effort, and the resulting performance continues to be made in the literature (e.g. Harrison & Shaffer, 2005). A combination of training and facilitation, such as relocation services and cultural integrators and assimilators, may assist adaptation to the new environment (Pires et al., 2006), yet the literature continues to examine each of these interventions in isolation, making assumptions that the combination of the interventions will add up to increased adjustment and performance. Research that investigates the impact of training and associated performance interventions, such as mentoring, compensation packages, and performance management systems is still needed (Littrell et al., 2006; Shay & Baack, 2006; Osman-Gani & Rockstuhl, 2008). Thus, the problem of this research was to examine the relationship between implemented performance interventions and the adjustment and perceived performance of North American expatriates.

Statement of the Purpose

The purpose of this research was to provide information to organizations regarding strategies to improve the adjustment and performance of their expatriates. Aligned with that purpose, the intent was for this research to assist human resource development practitioners in developing approaches to better assist those on international assignments. The research focuses on an integrated view of multiple post-arrival performance interventions to show the impact of using a combination of various performance interventions. A secondary purpose was to examine

the difference between the combinations of performance interventions that impact adjustment and perceived performance, which has received limited empirical attention (Harrison & Shaffer, 2005; Takeuchi et al., 2005; Kraimer et al., 2001). The results of the study have implications for MNCs and human resource development practitioners in considering how to support and enhance their expatriates' adjustment and performance post-arrival. Beyond direct praxis, the expectation is that the results of this study will contribute to and enhance the current literature through the design of the study, looking at multiple interventions simultaneously, and the focus of the study, both adjustment and performance.

Research Questions

The two specific research questions answered in this study include:

- (1) How do the examined performance interventions impact each of the three dimensions of expatriate adjustment?
- (2) How do the examined performance interventions impact expatriates' perceived performance?

Statement of the Methodology

A multivariate design was used to describe the dynamics underlying the dimensions of adjustment and performance by indicating which of the performance interventions in combination might be more strongly associated with adjustment and performance. To gather data, a questionnaire comprised of several existing constructs derived from the extant literature was developed. The questionnaire was administered via the internet using a web-based research survey tool.

The questionnaire was comprised of existing scales for a variety of performance interventions examined in the literature as independent variables. The independent variables are

integrated cross-cultural training (Eschbach et al., 2001), mentoring (Ragins, Cotton, & Miller, 2000), role ambiguity (Rizzo, House, & Lirtzman, 1970), spouse and family support (Black & Stephens, 1989), and compensation (Sims & Schraeder, 2005). The two dependent variables, which also use existing scales, are adjustment (Black & Stephens, 1989) and performance (Black & Porter, 1991). Adjustment is actually three separate dimensions, measured as three separate variables: general adjustment, interaction adjustment, and work adjustment (Black & Stephens, 1989).

The population from which the sample was drawn was all North American expatriates on assignment in Hong Kong. While a random sampling of all North American expatriates was beyond the researcher's resources, a non-probabilistic technique to identify a sampling frame was employed. While the use of a non-probabilistic technique necessarily limits the generalizability of the research results, access to an expatriate population was available using survey techniques consistent with prior research (McGinley, 2008). To obtain a large enough sample, the sample was drawn from the current membership directory of the American Chamber of Commerce (AMCHAM) in Hong Kong.

The data gathered on the instruments was analyzed with Windows[®] version 15 of SPSS. Statistical analysis to address the first research question included three separate multiple regressions with each of the performance interventions as independent variables in each analysis and the three dimensions of adjustment as the dependent variables, one in each of the regressions. A fourth multiple regression was conducted to address the second research question, with each of the performance interventions as independent variables and perceived performance as the dependent variable. The multiple regression method helped explain the dynamics underlying each of the dependent variables by indicating which of the performance intervention

variables in combination might be more strongly associated with it. Ultimately, the goal was to statistically account for the variance in each of the dependent variables using the examined set of performance interventions.

Significance of the Study

The results of this study are significant because they provide objective information for use in the design and implementation of a system of post-arrival performance interventions for expatriates working abroad. This study extends the current literature by examining multiple factors impacting expatriates' post-arrival adjustment and performance simultaneously.

Statement of Assumptions

Several assumptions exist in this study.

- (1) The study was focused on expatriates in for-profit organizations only, based on the assumption that the motives influencing the expatriate assignment are different in other areas such as missionaries and governmental workers.
- (2) The next assumption was that the study respondents are representative of the North American expatriates assigned to Hong Kong.
- (3) The assumption was made that all participants completing the survey were expatriates that meet the criteria of the study.
- (4) Finally, the constructs selected from the literature for use in the study were assumed to be valid for this population.

Statement of Limitations

This study is limited by a few factors.

- (1) The cross-sectional design of the study is a limitation. All of the measures were conducted on a single, combined instrument administered at a single point in time, which does not allow for causal inferences.
- (2) Another limitation of the study is the use of self-report data, which is a common limitation in the expatriate literature. The self-report questionnaire is the sole source of data, including performance data, which raises the possibility of common method bias and inflated correlations among study variables.
- (3) The focus on a single nationality assigned to a single host country limits the generalizability of the study to expatriates assigned to other countries and of other nationalities.
- (4) Finally, numerous factors contribute to adjustment and performance that are not considered in this study, such as personality type. While a number of control variables were used in the study, other variables not included may influence the results.

Statement of the Terminology

Adjustment

Adjustment is defined as the degree to which an individual has psychological comfort with the range of facets of a new setting (Black, 1988; Oberg, 1960). More recent literature uses the common conceptualization of adjustment as a multi-dimensional concept (Black et al., 1991) rather than a singular construct as previously understood (Gullahorn & Gullahorn, 1962; Oberg, 1960). Adjustment is seen as having three distinct dimensions: work adjustment, interaction adjustment with host nationals, and general adjustment to the non-work environment (Black et al., 1991).

Culture Shock

The concept of culture shock stems from Oberg's (1960) early work and later by Gullahorn and Gullahorn (1962). Basically, they suggest that when people enter a new country and culture they discover that acceptable behaviors in their home country are not acceptable in the foreign country and culture, resulting in stress (Oberg, 1960; Gullahorn & Gullahorn, 1962). "Culture shock is a stress reaction where salient psychological and physical rewards are generally uncertain" (Weisman & Furnham, 1987, p. 30).

Expatriate

For this study, an expatriate was defined as an individual sent to a foreign country by his or her organization for a period of time, such that the person relocates to the foreign country to complete the work assignment. Further, the work assignment in the foreign country is most likely for a temporary period of time, typically two to five years, meaning that the individual and the sending organization have an agreement upfront about the tenure of the assignment.

Home Country

The country from which the expatriate has current citizenship is the "home country." For example, if a current U.S. citizen is assigned to Hong Kong, the U.S. is the home country.

Host Country

The country to which the expatriate is assigned is the "host country." For example, if a current U.S. citizen is assigned to Hong Kong, China is the host country.

Integrated Cross-Cultural Training

Integrated cross-cultural training is cross-cultural training that begins pre-departure and continues periodically throughout the foreign assignment until most cross-cultural adjustments have been made (Eschbach et al., 2001).

Performance

The appropriate definition of expatriate performance has long been discussed (Gregersen, Hite, & Black, 1996; Caligiuri, 1997; Kraimer et al., 2001), with the argument that effective performance encompasses more than task performance. Thus, expatriate performance is defined as both task and contextual performance (Caligiuri, 1997). Contextual performance relates to the expatriates' level of effectiveness in performing international aspects of the job beyond task-specific duties (Borman & Motowidlo, 1993), such as developing and maintaining good working relationships with host nationals.

Performance Intervention

The term performance intervention can mean many things to many different people. This research utilized the standards of human performance technology developed by the International Society for Performance Improvement (ISPI) in determining what processes or activities are considered a performance intervention. The standards developed by ISPI require a systems view, seeing organizations as complex sets of interrelated components (International Society for Performance Improvement, 2009). With a systems view, performance interventions consider all facets of the work, work environment, and other impacts on the work. Examples of potential performance solutions include training, performance support tools, process design, workspace design, and changes in compensation or benefits (International Society for Performance Improvement, 2009). Thus, the definition of performance intervention is fairly broad in its application of available solutions to potential performance issues, meaning the five performance interventions under investigation in this study fit the definition of a performance intervention.

CHAPTER 2

LITERATURE REVIEW

The focus of this study was on performance interventions designed to improve adjustment and performance while on assignment. More specifically, this study focused on North American expatriates in Hong Kong. The rationale for limiting the study to North Americans was that many of the theoretical frameworks and measurement instruments are culturally bound (Boyacigiller & Adler, 1991). Utilizing studies that only sample North Americans helped to reduce the problem of culturally bound instruments.

Hofstede (1983) argued that nationality is important in management. He also argued that management is not the same around the world, and he highlighted several examples of how the United States is different from the rest of the world. Based on Hofstede's (2009) work, North American countries, meaning Canada and the United States, are similar to each other but different from European countries. These differences have been found to be exhibited in the adjustment displayed between North American expatriates in China and Western European expatriates in China, with North Americans actually showing greater adjustment (Selmer, 2000; 2001; 2004). Further, studies that combine the results of multiple nationalities may produce findings that are not beneficial. For instance, perceived ethnocentrism of host country nationals has shown a significant negative correlation with host commitment (Florkowski & Fogel, 1999). However, when the analysis was repeated separately for Europeans and Americans, Europeans'

host commitment was found to be significantly affected by perceived host country ethnocentrism, and Americans' host commitment was not significantly affected (Florkowski & Fogel, 1999). In a survey of 2,800 managers in 11 different countries, where significant differences existed, managers clustered together within cultural groups, with each culture behaving differently (Haire, Ghiselli, & Porter, 1963). Similarly, culture and level of industrialization have been found to be important to the values of managers (Whitely & England, 1977). To help control for issues related to culture and nationality, this study focused on North Americans working in one cultural context, Hong Kong.

Expatriate Adjustment

Adjustment is a multi-dimensional concept (Black et al., 1991) rather than a singular incident as previously understood (Gullahorn & Gullahorn, 1962; Oberg, 1960). Adjustment has three distinct dimensions: work adjustment, interaction adjustment with host nationals, and general adjustment to the non-work environment (Black et al., 1991). Support for the three distinct dimensions of adjustment is found in several studies (Black, 1988; Black & Gregersen, 1991; Shaffer, Harrison, & Gilley, 1999). Morley and Flynn (2003) empirically found that the concept of adjustment is multi-dimensional, and they suggest there is value in "unpacking the concept of adjustment and presenting it as a multi-dimensional concept" (p. 53). More recently, Bhaskar-Shrinivas et al. (2005) conducted a meta-analysis, with data from 8,474 expatriates across 66 studies, finding support for Black et al.'s (1991) multi-dimensional model.

A large body of literature focuses on general factors related to the three dimensions of adjustment. These studies do not tend to address specific interventions that organizations can utilize to improve adjustment though. Consistent with the multi-dimensional framework of adjustment, many of these studies primarily addressed the three facets of adjustment: work

adjustment, interaction adjustment, and general adjustment. Some studies did look at other factors such as turnover (Birdseye & Hill, 1995), on-the-job challenges (Jassawalla, Truglia, & Garvey, 2004), and career outlook (Stroh, Dennis, & Cramer, 1994).

Work Adjustment

Role ambiguity, role discretion, role conflict, and interaction with host nationals have shown a strong relationship to work adjustment (Black & Gregersen, 1991). While many studies did not examine all of those factors, these findings are consistently supported throughout the literature. Role ambiguity and role discretion seem to have a significant negative relationship with work adjustment (Black, 1988). Morley and Flynn's (2003) study on North American expatriates in Ireland supports these findings as well. They found that role ambiguity and role conflict had a significant negative relationship with work adjustment, with role ambiguity displaying the most significant relationship with work adjustment (Morley & Flynn, 2003). In the same study, the North Americans in Ireland indicated very low levels of role ambiguity and role conflict, while expressing high levels of work adjustment (Morley & Flynn, 2003). Contrary to expectations, role novelty demonstrated a significant positive relationship with work adjustment (Morley & Flynn, 2003).

Interaction Adjustment

Interaction with host nationals and spousal interaction adjustment are strongly related to interaction adjustment (Black & Gregersen, 1991). Surprisingly, a study that examined the adjustment of Western European versus North American expatriates in China found that the North Americans scored higher on interaction adjustment than the Western Europeans (Selmer, 2001). In a separate study, U.S. expatriates in China were found to have higher adjustment levels than French expatriates in China (Selmer, 2000). This is contrary to the popular belief that the

North Americans, sometimes referred to as “ugly Americans,” are less well adjusted than Western Europeans (Selmer, 2001). As with work adjustment, role novelty demonstrated a significant positive relationship with interaction adjustment (Morley & Flynn, 2003). More surprising, role novelty was found to be the most significant work-role characteristic impacting interaction adjustment in one study (Morley & Flynn, 2003). While not specifically related to interaction adjustment, interaction with host country nationals positively related to intent to stay (Gregersen & Black, 1990).

General Adjustment

Interaction with host nationals and spousal interaction adjustment are strongly related to general adjustment (Black & Gregersen, 1991). This finding is consistent with Black’s (1988) prior work that found time spent with host nationals, both inside and outside of work, and the families’ general adjustment impacted the expatriates’ general adjustment. Adjustment to the general culture positively relates to intent to stay (Gregersen & Black, 1990). This may be because general adjustment has been found to be significantly related to work adjustment (Florkowski & Fogel, 1999). As with work and interaction adjustment, role novelty demonstrated a significant positive relationship with general adjustment (Morley & Flynn, 2003). As with interaction adjustment, role novelty has been found to be the most significant work-role characteristic impacting general adjustment (Morley & Flynn, 2003).

Critique of Expatriate Adjustment

The original multi-dimensional model of adjustment (Black et al., 1991) provided the first theoretical foundation for understanding adjustment. Even more, the original model prompted a rapid increase in theoretically-based empirical research on expatriates, which has largely lent support to the model developed.

The primary weakness of the model is that adjustment is really a moderating variable not a dependent variable (Caligiuri, 1995). Ultimately, adjustment is not the goal of the international assignment, rather a measure of performance is more appropriate. Adjustment is only the start of understanding work performance (Ashford & Taylor, 1990). The use of adjustment as a sole criterion is a limitation of much of the current literature (Sinangil & Ones, 2001). Thus, it seems that Black et al.'s (1991) model needs to be extended to incorporate relevant performance outcomes.

Expatriate Performance

In the literature, scholars have not been consistent in how effectiveness has been defined (Harrison et al., 2004; Ones & Viswesvaran, 1997). The literature is predominately comprised of two main criteria for determining assignment success: adjustment and return decisions. The literature in the late 1980s and early 1990s tended to focus on adjustment (e.g. Black, 1988; Black & Gregersen, 1991; Black et al., 1991). In the 1990s, scholars began to focus on one consequence of poor adjustment: the decision to return from an international assignment prematurely (e.g. Gregersen & Black, 1990; Naumann, 1993a; Birdseye & Hill, 1995). The assumption behind much of the adjustment and premature return literature is that an inability to adjust will result in psychological strain that will “spill over” to poor observable performance or premature return (Shaffer & Harrison, 1998). Conceptually, well-adjusted expatriates should have greater resources (time, effort, and emotional investment) available to support good performance (Shaffer et al., 2001). The trend from the late 1990s into the 2000s is to look more closely at performance (Takeuchi et al., 2005; Kraimer et al., 2001; Caligiuri, 1997).

Two broad dimensions for job performance, task and contextual, have been proposed in the literature (Borman & Motowidlo, 1993; Caligiuri, 1997). Task performance relates to the

specific job duties of the assignment. Contextual performance relates to the level of effectiveness in performing international aspects of the job beyond task-specific duties (Borman & Motowidlo, 1993), such as developing and maintaining good working relationships with host nationals. Consideration of context-related criteria helps avoid opportunity bias that may occur when varying levels of performance result from factors beyond the expatriates' control (Peters, O'Connor, & Eulberg, 1985).

There has been limited prior research that examines the relationship between adjustment to the international assignment and job performance (Kraimer & Wayne, 2004; Kraimer et al., 2001; Parker & McEvoy, 1993). Only one study was identified that examined the relationship between adjustment and performance longitudinally (Takeuchi et al., 2005). In that study, work adjustment at time one exhibited a significant positive relationship with job performance at time two, which was one year later. Interestingly though, general adjustment at time one did not show a significant relationship to job performance at time two (Takeuchi et al., 2005). The findings did support prior findings that work adjustment is related to performance (Kraimer et al., 2001). Additionally, Kraimer et al. (2001) found a significant relationship between interaction adjustment and contextual performance. However, recent literature proposes that operational capability may have the dominant role in performance, suggesting that adjustment has little effect (Holopainen & Bjorkman, 2005).

Critique of Expatriate Performance

The literature regarding performance has not produced a consistent definition of success or appropriate performance. Much of the literature focuses on antecedents of performance, which seems to be needed. However, the difficulty is that without a clear definition of performance outcomes accurately determining antecedents of performance is elusive. Further, the literature

has primarily focused on personal factors or organizational factors, but little attention has been paid to the connection between performance interventions undertaken by organizations and actual job performance.

Self versus Other Performance Ratings

An issue not frequently addressed in the literature is the use of self-ratings versus other ratings, such as co-workers or supervisors. The literature that has directly examined expatriate job performance is limited. The literature that does exist has measured job performance on a variety of differing scales using different types of raters. About one-third of the literature uses self-ratings, one-third uses supervisor ratings, and one-third uses a mix of self, supervisor, and others, such as co-workers. Table 1 provides a short outline of the literature examining expatriate job performance.

None of the articles identified provided a clear rationale for using the chosen rater. Those that used ratings other than self-ratings simply said the decision to use a different rater was to prevent issues related to common method bias. None of the studies using self-ratings addressed the rationale either. The assumption is that the use of self-ratings is for convenience.

In a recent meta-analysis, the convergence of self-ratings with supervisory ratings of job performance was examined (Heidemeier & Moser, 2009). The meta-analysis found a correlation between self- and supervisory ratings of .22 ($r = .34$ when corrected for measurement error), which is consistent with prior meta-analyses (Conway & Huffcutt, 1997; Harris & Schaubroeck, 1988). The results indicate differences in self-ratings to be at a significantly lower level than the previous meta-analytical findings provided (Harris & Schaubroeck, 1988). Yet, the findings still do show that self-ratings tend to overrate supervisory ratings by one third of a standard deviation.

Table 1

Expatriate Performance Literature

Article	Rater Used			Measure Used
	Self	Supervisor	Others	
Black & Porter, 1991	X			Created measure for study
Harrison & Shaffer, 2005	X	X	X	(Caligiuri, 1997)
Kraimer et al., 2001		X		Created measure for study based on Caligiuri (1997), Feldman & Thomas (1992), and Gregersen et al. (1996)
Lee & Sukoco, 2008	X			Used both Black & Porter (1991) and Caligiuri (1997)
Shaffer, Harrison, Gregersen, Black, & Ferzandi, 2006	X		X	Caligiuri, 1997
Shay & Baack, 2004	X		X	Used both Black & Porter (1991) and Caligiuri (1997)
Takeuchi et al., 2005		X		Used existing company performance appraisal form
Takeuchi, Wang, Marinova, & Yao, 2009		X		Podsakoff & MacKenzie, 1989; Janssen & Van Yperen, 2004

In a separate meta-analysis, results of the study provided empirical support for previous findings that the use of self-report data in assessing the relationship between stressors and performance (Gilboa, Shirom, Fried, & Cooper, 2008; Bommer, Johnson, Rich, Podaskoff, & Mackenzie, 1995). These findings, based on a systematic comparison of a variety of stressors across multiple performance dimensions, provide support contrary to common concerns that self-rated performance may contribute to invalid conclusions. The two common arguments against the use of self-rated performance are (1) self-report measures of both the independent and dependent variables may inflate the correlation between the two because of common method variance (Gilboa et al., 2008) and (2) self-rated performance leads to overrated performance and lower variability in performance scores (Dunning, Heath, & Suls, 2004). However, the results of

the meta-analysis between the various role stressors and self-rated performance were in the same direction as the results based on supervisory ratings or objective performance data (Gilboa et al., 2008). This seems to suggest that self-report performance data may provide useful information to researchers and practitioners, considering that these are not absolute measures of performance.

Interestingly, Heidemeier and Moser (2009) did examine the impact of scale on interrater correlations, finding that scale properties have systematic effects on mean-level discrepancies between self- and other ratings. The over ratings exhibited in self-ratings were moderated by scale format (social comparison scales) as well as by scale content (overall vs. dimensional ratings; task vs. contextual performance vs. traits). Heidemeier and Moser (2009) suggest that biased self-ratings are more pronounced for less well-defined (“global”) performance dimensions. This may be part of the reason why they found that employees tended to overrate contextual performance more than task performance, since contextual performance is less well defined (Heidemeier & Moser, 2009).

Theoretical Framework

A limitation of much of the expatriate literature is the lack of a theoretical underpinning. The trend over the past decade has been changing this, due in large part to the seminal work of Black et al. (1991) in the adjustment domain. However, outside of the work directly related to adjustment, there is not a consistent theoretical basis in the literature. The following is a brief review of some promising theories that provide guidance and connection for this study. Figure 1 provides a pictorial view of how the theories interact in relationship to adjustment and job performance.

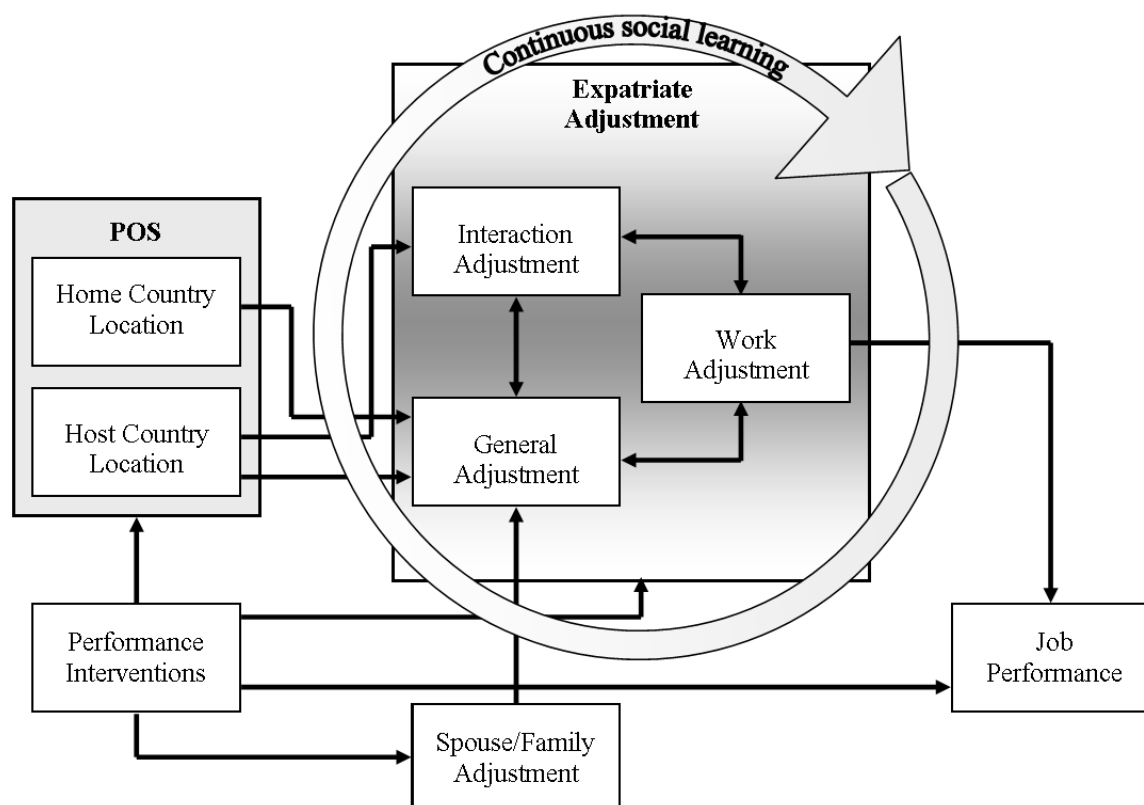


Figure 1. Diagram of Theoretical Framework.

Spillover Theory

Spillover theory suggests that stress and problems in non-work domains of life impact individuals' adjustment to the work environment (Bhagat, 1983). Based on spillover theory, stress and issues related to adjusting to life in the new foreign culture may "spill over" into the actual work assignment, impacting work adjustment and performance (Takeuchi, Yun, & Tesluk, 2002). Thus, experiences at work can "spill over" to home, and experiences at home can "spill over" to work (Caligiuri, Hyland, Joshi, & Bross, 1998). One meta-analysis showed a clear link between three work-related stressors, role clarity, role discretion, and coworker support, and both general and interaction adjustment (Bhaskar-Shrinivas et al., 2005). In an empirical study, significant spillover effects were identified between the work and non-work domains, with expatriates' degree of cross-cultural adjustment to living conditions in the foreign country

showing a positive relationship with general adjustment and job satisfaction, both of which had a negative relationship to premature return intentions (Takeuchi et al., 2002).

Transaction Cost Theory

Transaction cost theory examines the impact of a system of activities taking place during all stages of a contract (Williamson & Masten, 1999). McNulty and Tharenou (2004) suggest that the international assignment may be considered a contract between the organization and the expatriate. In transaction cost theory, each contractual activity by either party has the potential to increase or decrease the costs and benefits to the firm over the life of the contract (Tan & Mahoney, 2003). For example, activities such as cross-cultural training that help to increase adjustment may in turn lead to increased performance and reduced intentions to return prematurely (Bhaskar-Shrinivas et al., 2005; Harrison et al., 2004).

Contact Theory

Contact theory suggests that increasing the frequency and number of interpersonal relationships across cultural groups will reduce intergroup conflict (Kraimer et al., 2001). Homans suggested that the interaction between cultural groups leads to positive feelings toward the other group (as cited in Kraimer et al., 2001, p. 78). A second possible explanation provided by Ashmore is that intergroup contacts provide a valuable source of information that helps to challenge biases and reduce intergroup conflict (as cited in Kraimer et al., 2001, p. 78). The significant relationship found between interaction adjustment and general adjustment lends support for contact theory (Kraimer et al., 2001). This suggests that more frequent and higher levels of interaction with host nationals will help expatriates gain needed information to facilitate their adjustment.

Social Learning Theory

Social learning theory suggests that individuals learn based on the consequences of their actions, observations of other people's behavior and associated consequences, and imitation of modeled behavior (Bandura, 1977). Bandura (1977) described four elements of social learning theory: attention, retention, reproduction, and incentives. The concept of attention is that before an individual can model a behavior, the individual must notice the behavior. Retention is the process by which the observer encodes the modeled behavior in memory. The third major element of the modeling process is reproduction, which translates the symbolic representations of the modeled stimuli into overt actions. The final element, incentives, influences the behaviors executed by the observer. Expatriates adjusting to a new culture are involved in a learning process, which means social learning theory provides a theoretical framework from which cross-cultural adjustment can be examined (Black & Mendenhall, 1991).

Organizational Support Theory

Organizational support theory suggests that the benefits or consequences of perceived organizational support result from the employees' perceptions of the organization's fair and beneficial treatment and from the normal reciprocity that exists within a typical social exchange framework (Rhoades & Eisenberger, 2002). The early work with expatriates in this area examined the antecedents, such as human resources practices, and the organizational commitment resulting from perceived organizational support during the international assignment (Guzzo, Noonan, & Elron, 1994). In more recent work, perceived organizational support and affective commitment were shown to relate to intentions to return prematurely (Shaffer et al., 2001). Kraimer et al. (2001) examined differences in perceived organizational support from the home country organization and the foreign facility. Interestingly, their findings showed

perceived organizational support from the home country positively related to general adjustment, while perceived organizational support from the foreign facility positively related to both general and interaction adjustment, but neither showed any relationship to work adjustment. Much of the work on perceived organizational support has promise, but greater work and consistency of findings related to outcomes such as job performance is needed (Harrison et al., 2004).

Resource Allocation Theory

Resource allocation theory suggests that individuals make conscious choices as to how to allocate their cognitive, emotional, and physical resources to attend to job related tasks and goals (Kanfer & Ackerman, 1989). This theory helps in understanding how individuals divide abilities and resources between various tasks (Kanfer, 1990). Resource allocation theory may have implications with expatriates as they tend to have individual resource demands for relocation related activities, adjustment to the new culture, and adjustment to the new work assignment.

Resource allocation theory also distinguishes between resource-sensitive and resource-insensitive tasks (Kanfer & Ackerman, 1989). Changes in the level of attentiveness to resource-sensitive tasks can lead to changes in performance, where changes in resource-insensitive tasks do not always result in noticeable changes in performance. The proposition is that when expatriates are given time to attend to resource-sensitive tasks during transitional times of international relocation they should be better able to perform than those who are not given the same time (Saathoff-Wells, 2000).

Performance Interventions in North American Literature

The literature has long suggested that it is important for organizations to facilitate adjustment (Gregersen & Black, 1990) by managing the factors the organization can control (Stroh et al., 1994). This is of particular interest since job, task, and organizational characteristics

may play a greater role in satisfaction and commitment than worker characteristics (Naumann, 1993a; Naumann, 1993b). This seemingly indicates that organizations can impact job satisfaction and commitment by the policies and programs employed. The findings in the literature outline key areas for interventions as well as some specific performance interventions that seem to positively impact adjustment and performance.

The extant literature examined was separated into five broad subjects of post-arrival, on-assignment performance interventions. The subjects represent broad coverage of performance interventions, but the literature does not exhibit a depth of research in most subject areas. With the rapid growth in the number of North American expatriates and the reports of performance difficulties, it is surprising that more studies examining on-assignment interventions were not identified. In addition to the scarcity of the literature, many of the existing studies are exploratory in nature. The literature lacks density in empirical studies that examine critical practices for practitioners working with individuals on foreign assignments.

Integrated Cross-Cultural Training

Prior to conducting the literature review, it was assumed that several articles related to on-site, post-arrival training would be identified. Unexpectedly, only three empirical studies related to on-site training. Part of this expectation was based on an earlier finding that only 30% of U.S. expatriates receive some form of pre-departure cross-cultural training (Goldstein & Smith, 1999), while 66.7% of respondents in a different study selected “disagreement” or “moderate value” regarding the helpfulness of pre-departure cross-cultural training in adapting to the host country (Shim & Paprock, 2002). These types of findings may be due to organizations not understanding or utilizing the contingency framework for training originally recommended by Tung (1982). The contingency framework allows for the systematic analysis of specific

environmental and task factors prior to the development of a training program, indicating that no one program fits for each situation (Tung, 1982).

In a study of integrated cross-cultural training, combining pre-departure and post-arrival training, researchers found that integrated cross-cultural training reduces the time necessary to perform effectively (Eschbach et al., 2001). At two months on assignment, those receiving integrated cross-cultural training were shown to have significantly increased job satisfaction, increased adjustment to interacting with host nationals, increased general adjustment, and increased productivity and effectiveness (Eschbach et al., 2001). Additionally, those receiving integrated cross-cultural training were shown to have significantly increased general adjustment and interaction adjustment at nine months on assignment as well (Eschbach et al., 2001). The increased adjustment may tie to the finding that reflective learning while in the host country helps with adjustment because participants examine “their behaviors and assumptions that they gained from their home country or their experience” (Shim & Paprock, 2002, p. 20). Other means of host country learning utilized include: passive observation, media programs about the host country that were produced in the home country, and language acquisition (Shim & Paprock, 2002). With the potential value of integrated cross-cultural training, greater attention and research in this area is needed (Eschbach et al., 2001).

Mentoring

Despite the frequent recommendations to further study the effect of mentoring on effectiveness, relatively little research has been completed, with the limited research primarily focused on home-country mentors (Mezias & Scandura, 2005). Yet, on-site mentoring has been shown to help with socialization (Feldman & Bolino, 1999). In a study that compared stories from interviews with hero tales and paradoxes, one significant outcome was the importance

participants placed on having cultural mentors (Osland, 2000). The provision of a cultural mentor may enhance employees' adjustment and help them perform better (Shim & Paprock, 2002). Cultural mentors seemed to translate the culture and warn of potential pitfalls, which seemed to help participants adjust better and receive higher performance ratings (Osland, 2000).

Organizations should not underestimate the value of host country mentors (Florkowski & Fogel, 1999). Yet, there is a scarcity of literature related to expatriate mentoring (Jassawalla, Asgary, & Sashittal, 2006). There seems to be a lack of research and practice related to expatriate mentoring. In their study that interviewed 27 expatriates after repatriation, only six of the participants reported having formal mentors, while eleven others individually sought out informal mentors (Jassawalla et al., 2006). Though not all of the participants had mentors, all of them viewed the concept of mentoring favorably (Jassawalla et al., 2006). Those interviewed also recommended mentors that had both home and host country knowledge and experience (Jassawalla et al., 2006).

One reason home country mentors may be valuable is to help overcome the demoralizing impact of feeling disconnected from the home office (Jassawalla et al., 2006). In a separate set of interviews, participants recommended the use of a domestic mentor to act as a liaison to the home office (Jassawalla, Truglia et al., 2004). This is similar to prior suggestions of providing formal sponsors as a means to maintain corporate commitment (Gregersen & Black, 1990). Home-country mentors provide a connection to the happenings of the home office, the ability to participate in corporate decisions, a sounding board, advice in handling new scenarios, and access to the corporate network (Mendenhall & Oddou, 1985; Mayrhofer & Scullion, 2002). However, some studies have actually found that domestic mentors detract from work adjustment (Black, 1992; Florkowski & Fogel, 1999). One thought might be that the lack of a home country

mentor may force individuals to figure out how to fit into the host country unit (Florkowski & Fogel, 1999). Further research in the use of mentors is needed to draw any definitive conclusions. Also, further research is needed to determine the role of mentors, as great variation in the role of mentors seems to exist, with those who did have mentors desiring more from their mentors (Jassawalla et al., 2006).

Role Ambiguity

The four most frequently cited instances of role ambiguity include: (1) uncertainty about how work is evaluated; (2) uncertainty about advancement opportunities; (3) uncertainty about scope of responsibilities; and (4) uncertainty about others' performance expectations (Handy, 1985). It is expected that a major work role transition such as an international assignment would have some role ambiguity associated with it (Black, 1988). The basic understanding is that the greater the role ambiguity, the less able the individual is to predict the outcomes of certain behaviors (Black, 1988).

Role ambiguity is one work characteristic, along with role discretion and role conflict, that has a strong relationship to work adjustment (Black & Gregersen, 1991a). These findings seem to be consistently supported throughout the literature. For instance, Black (1988) found a significant negative relationship between role ambiguity and work adjustment. Morley and Flynn's (2003) study on North Americans in Ireland supports these findings as well. Of the work characteristics examined, they found that role ambiguity had the most significant relationship with work adjustment (Morley & Flynn, 2003). Consistent with the findings related to role ambiguity, a series of interviews indicated a need for organizations to provide clear expectations (Jassawalla, Truglia et al., 2004).

In one study, role ambiguity was one of the variables associated with job satisfaction, with others including task identity, participation in decision-making, tenure, perceived value of assignment on career, and task significance (Naumann, 1993a). This is important, as the same study found a strong correlation between both satisfaction and commitment and intention to quit (Naumann, 1993a). The variables associated with commitment also included role ambiguity, along with participation in decision-making, perceived value of assignment on career, role conflict, task significance, and autonomy (Naumann, 1993a). Role ambiguity was one of the best predictors of satisfaction and commitment (Naumann, 1993a). The primary implication is that clear work expectations should reduce role ambiguity and positively impact satisfaction (Naumann, 1993a; Naumann, 1993b). This area of literature needs extended to determine the impact of reduced role ambiguity on actual performance.

Spouse and Family Support

In one study, 97.3% of respondents agreed that the satisfaction of spouses or significant others was a critical factor for assignment success (Handler & Lane, 1997). This is consistent with the existing research that the spouses' adjustment has a significant impact on adjustment (Black & Stephens, 1989; Stroh et al., 1994; Mohr & Klein, 2004). Further, the spouses' general and interaction adjustment relate positively to the expatriates' intent to stay (Black & Stephens, 1989). Similarly, a strong negative relationship between spouse satisfaction and turnover has been found (Birdseye & Hill, 1995). The impact spouses' adjustment seems to have on expatriates' adjustment indicates a need for organizations to be concerned with the spouses' adjustment, as spouses are generally more directly involved with the local environment on a daily basis (Shaffer & Harrison, 2001). The whole family's ability to adapt has also been identified as an important factor in performance and turnover (Tung, 1981). Tung (1981)

originally cited the spouses' inability to adjust as the number one reason for failure, with more recent studies seeming to confirm that finding (Dowling & Welch, 2005).

Beyond the impact on the expatriates' adjustment, the spouses' general adjustment on an assignment was shown to explain a unique variance in the spouses' willingness to relocate internationally in the future (Larson, 2006). This suggests that companies risk future assignments being turned down by employees if the spouses' general adjustment is ignored (Larson, 2006). Similar to expatriates, three dimensions of spouses' adjustment emerged: general, interaction, and role adjustment (Mohr & Klein, 2004). Interestingly, a significant difference in the level of adjustment in the three dimensions between spouses with children and spouses without children was not found (Mohr & Klein, 2004). However, only 6 of the 43 spouses in their study had children (Mohr & Klein, 2004).

Many factors seem to impact spouse adjustment. Black and Gregersen (1991b) found that the level of spouse interaction and general adjustment varies by the country of assignment. This may be related to findings that cultural novelty relates to the spouses' general adjustment (Black & Gregersen, 1991; Black & Stephens, 1989) and interaction adjustment (Black & Gregersen, 1991b). Additionally, Mohr and Klein (2004) found a significant negative relationship between perceived cultural distance and general adjustment. Another related factor may be the level of language knowledge, which was found to relate positively to general and interaction adjustment (Mohr & Klein, 2004).

In an older exploratory study, several issues that spouses seemed to consider important were identified: medical care, housing, and home leave (Baker, 1976). Home leave was stressed by the spouses in the study as extremely necessary (Baker, 1976). This study seemed to show medical coverage to be addressed by organizations, though no participants in the study had medical

problems while on assignment (Baker, 1976). While housing was seen as important, organizations' realty services seemed non-existent (Baker, 1976). Baker's (1976) study did not demonstrate any needs of the spouses though; the study only reported issues that were seen as important by the spouses.

Further, total time on assignment and favorable living conditions were shown to significantly relate to the spouses general and interaction adjustment (Black & Gregersen, 1991b). Lastly, family support was found to be related to spouse interaction adjustment as well (Black & Gregersen, 1991b). Black and Gregersen (1991b) also indicated that greater family support and host country national's (HCNs) support equated to greater spouse interaction adjustment.

These factors align with findings that MNCs need to support spouses during the assignment (Harvey, 1998). Expatriates' focus of support needs was found to be more on assistance for the trailing spouses than on assistance with their own adjustment to the foreign assignment (Harvey, 1998). Spouse adjustment was perceived to be hindered by the lack of support, training, and proper compensation package while on assignment (Harvey, 1998). Despite the seeming importance, the literature has primarily focused on the spouses' adjustment and its relation to the expatriates' adjustment, but studies examining the relationship between support for spouses and expatriate performance were not identified.

Compensation

Compensation of North American expatriates is not well examined in the literature. Most of the work simply focuses on how MNCs structure compensation packages, but the literature is limited in relation to compensation's impact on adjustment or performance. Only one article relating directly to the impact of compensation on adjustment or performance emerged from the

literature, and this study indicated a lack of literature on international compensation (Harvey, 1993). The literature related to compensation is either descriptive of the different types of compensation strategies or is focused on taxation issues. The one study identified is exploratory in nature, providing only descriptive data, so its findings cannot be generalized (Harvey, 1993).

Harvey (1993) sampled human resource managers at various levels, finding four recurring problems impacting expatriates while on assignment. Discrepancies amongst compensation for expatriates, local nationals, and third party nationals is the most common problem, with 80% of the respondents reporting the discrepancies as either a significant or very significant problem (Harvey, 1993). The most difficult aspect for human resource managers was discerning allowances and hardship pay in underdeveloped countries (Harvey, 1993). Another common problem for human resource managers was the impact of the individuals' family life cycle, with 77% of the respondents reporting the problem as important (Harvey, 1993). This may be important considering trailing spouses were more concerned with the family life cycle, which seemed to have a significant impact on adjustment (Harvey, 1998). The human resource managers expressed a need to evolve compensation packages as the family life cycle evolves (Harvey, 1993). One other common difficulty with compensation is that compensation can become a source of injustice and frustration for HCN employees (Toh & DeNisi, 2003).

Several elements of compensation exist, typically including: base salary, benefits, "special" benefits (e.g. extra vacation time, home visits), relocation expenses, housing allowances, education allowances, hardship allowances, and taxes (Hodgetts & Luthans, 1993). Significant problems related to compensation packages can be seen in the high levels of reported dissatisfaction, with 77% reporting dissatisfaction with their compensation packages (Black, 1991). Issues related to both the standard of living and the costs of living arose in Birdseye and

Hill (1995), finding that standard of living and costs of living impacts turnover. As a result of their study, Birdseye and Hill (1995) indicated that emphasizing material benefits in benefit packages is a key factor in reducing the potential for turnover. While specific factors related to compensation were not identified, it seems important that organizations carefully consider how compensation impacts adjustment and performance.

The literature identified a few common approaches to compensation. While the specific aspects of compensation packages may differ, the approaches can generally be grouped into three categories: balance sheet approach, destination-based approach, and international headquarters approach (Sims & Schraeder, 2005). All approaches attempt to keep the expatriate “whole.” The idea of maintaining wholeness for the expatriate is ensuring that the expatriate does not have an overt gain or loss as a result of the total compensation package (Wentland, 2003). However, the approach to maintaining wholeness differs depending on the execution of the compensation package by organizations.

The balance sheet approach is the most common approach to compensating those on international assignments, with more than 85 percent of US organizations employing this approach (Wentland, 2003). The general goal of the balance sheet approach is to help employees maintain their home lifestyle through the provision of equivalent purchasing power abroad. The focus is on maintaining equity between expatriates and their peers back home (Reynolds, 2000).

The destination-based approach to compensation considers how expatriates’ compensation compares with HCN employees and what competitors are paying (Wentland, 2003; Chen, Choi, & Chi, 2002). Specifically, common allowances, such as housing, children’s education, and other hardship allowances, are drastically truncated. This approach has gained popularity with many MNCs as a means of cutting costs (Sims & Schraeder, 2005).

The international headquarters approach, or regional approach, compensates expatriates using an identical balance sheet method within the same defined geographic region regardless of where the expatriate originated from (Chen et al., 2002). The concept is designed to help ensure that those working in a given geographic region are not working under different compensation packages, with the goal of promoting perceptions of equity (Chen et al., 2002).

The large majority of the literature related to compensation is descriptive in nature. The few exploratory studies either attempted to explain how MNCs compensate expatriates, problems faced by MNCs with compensating expatriates, or expatriates' satisfaction with their compensation. No work related to how the approach to compensation relates to adjustment or job performance seems to exist.

Hong Kong

The Hong Kong Special Administrative Region (SAR) was established in 1997 as a part of China after 155 years of British colonial rule (CIA, 2009). Hong Kong is located south of the Chinese mainland and comprises a modern, mostly urban society. Hong Kong's population is 7 million (CIA, 2009). Hong Kong is predominantly Chinese, with an overwhelming majority belonging to the Cantonese dialect group (CIA, 2009).

Hong Kong is a major economic participant worldwide. While Hong Kong is not a country, major economic forums, such as the World Bank, treat Hong Kong economically as an independent country. In the World Bank (2009) Ease of Doing Business Rankings, Hong Kong ranked fourth of 181 ranked countries. The Global Enabling Trade Report, published annually by the World Economic Forum (2009), ranked Hong Kong first out of 118 countries rated, acknowledging Hong Kong's positive factors, policies, and services that facilitate the free flow of goods across borders. The Globalization Index is a ranking that depicts which countries are

the most globalized by assessing key factors of global integration. The Globalization Index ranked Hong Kong second out 198 ranked countries (A. T. Kearney, Inc., 2007). Overall, Hong Kong is a major economic participant, which is why it was selected as the destination for the study.

CHAPTER 3

METHODOLOGY

The purpose of this research was to provide information to organizations regarding strategies to improve the adjustment and performance of their expatriates. Aligned with that purpose, the intent was for this research to assist human resource development practitioners in developing approaches to better assisting those on international assignments. The research focused on an integrated view of multiple post-arrival performance interventions to show the correlation of the various performance interventions with adjustment and performance. A secondary purpose was to examine the difference between the combinations of performance interventions that impact adjustment and perceived performance, which has received limited empirical attention (Harrison & Shaffer, 2005; Takeuchi et al., 2005; Kraimer et al., 2001). The results of the study have implications for MNCs and human resource development practitioners in considering how to support and enhance their expatriates' adjustment and performance post-arrival. Beyond direct praxis, the expectation was that this study will contribute to and enhance the current literature through the design of the study, looking at multiple interventions simultaneously, and the focus of the study being on both adjustment and performance.

The research used a multiple regression design utilizing a cross-sectional survey methodology, with multiple constructs derived from the extant literature, administered via web-based survey technology. The purpose of the design was to reveal the total amount of variance in

the scores for the three adjustment dimensions and the scores for perceived performance as accounted for by the combination of the performance intervention constructs. Additionally, this research design allowed for the determination of which performance intervention accounted for the largest unique variance in each of the three dimensions of adjustment and in perceived performance.

Restatement of Research Questions

This research had two guiding research questions. The specific research questions answered in this study include:

- (1) How do the examined performance interventions impact each of the three dimensions of expatriate adjustment?
- (2) How do the examined performance interventions impact expatriates' perceived performance?

Hypotheses

Based on the literature review, four hypothesized regression models were developed to help answer the research questions. Each of the hypothesized regression models hypothesized which of the performance intervention independent variables would account for a statistically significant amount of variance in the dependent variable. Hypotheses one through three attempted to provide answers to the first research question. Figure 2 depicts the hypothesized regression model for general adjustment, representing hypothesis one. Figure 3 depicts the hypothesized regression model for interaction adjustment, representing hypothesis two. Figure 4 depicts the hypothesized regression model for work adjustment, representing hypothesis three. Hypothesis four attempted to provide an answer to the second research question. Figure 5 depicts the hypothesized regression model for perceived performance, representing hypothesis four.

H1: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with general adjustment.

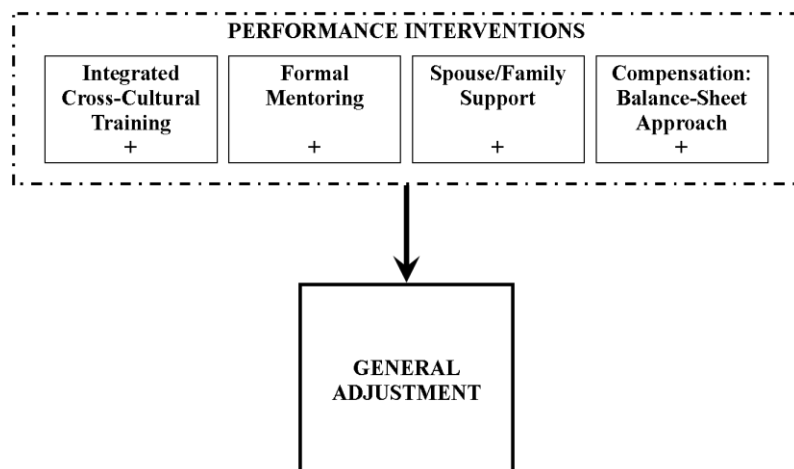


Figure 2. Hypothesized Regression Model for General Adjustment

H2: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with interaction adjustment.

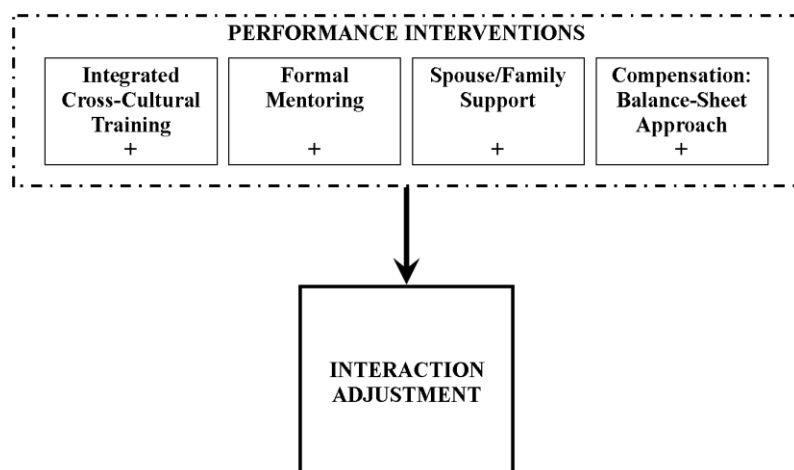


Figure 3. Hypothesized Regression Model for Interaction Adjustment

H3: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with work adjustment, while role ambiguity exhibits a negative relationship with work adjustment.

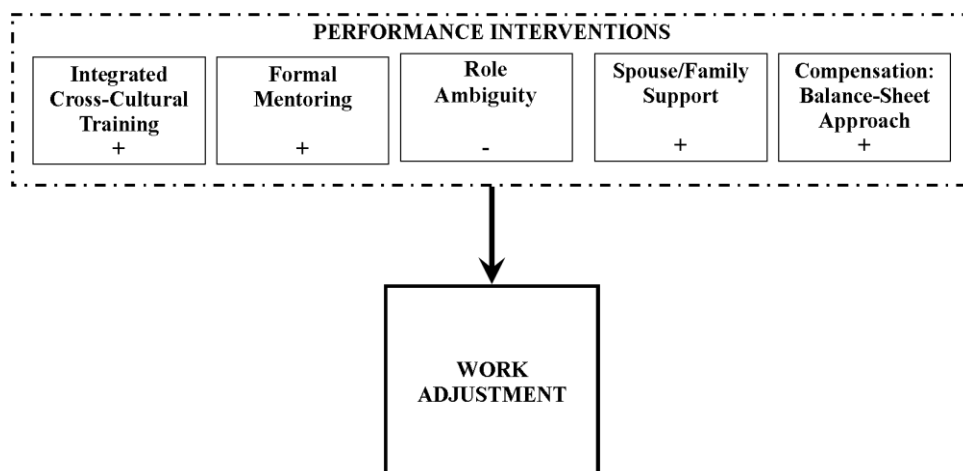


Figure 4. Hypothesized Regression Model for Work Adjustment

H4: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with perceived performance, while role ambiguity exhibits a negative relationship with perceived performance.

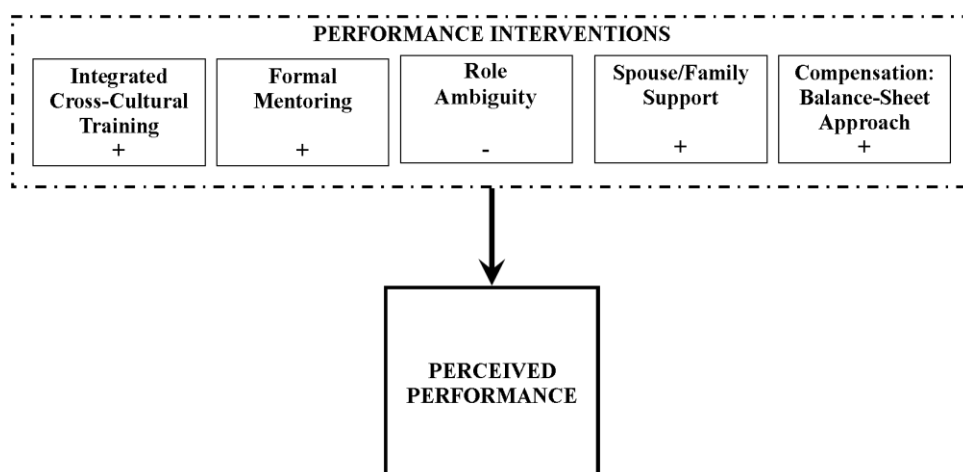


Figure 5. Hypothesized Regression Model for Perceived Performance

Rationale for Hypotheses

Integrated cross-cultural training. Based on the literature review and transaction cost theory, it was expected that integrated cross-cultural training would enable expatriates to adjust better on all three adjustment dimensions (general, interaction, and work). Thus, integrated cross-cultural was expected to positively account for a statistically significant amount of variance in general adjustment, interaction adjustment, and work adjustment, as depicted in figures 2, 3, and

4. Additionally, it was expected that integrated cross-cultural training would positively impact perceived performance, as depicted in figure 5.

Mentoring. The literature indicated a significant gap in the current knowledge about the role of mentoring. This study only examined the relationship between perceived mentoring effectiveness and the adjustment dimensions and perceived performance. Based on the literature review, spillover theory, and organizational support theory, it was expected that the presence of a formal mentoring program, perceived to be effective, would positively account for a statistically significant amount of variance in general adjustment, interaction adjustment, work adjustment, and performance as depicted in figures 2, 3, 4, and 5.

Role ambiguity. The literature has long indicated that role ambiguity has a negative relationship with work adjustment. However, the literature did not reveal findings related to role ambiguity and job performance. This study sought to confirm that role ambiguity has a negative impact on work adjustment, while extending the literature to show that role ambiguity has a negative impact on perceived job performance as well. Based on the literature review and allocation theory, it was expected that role ambiguity would negatively account for a statistically significant amount of variance in work adjustment and performance, as depicted in figures 4 and 5.

Spouse and family support. The literature indicates that spouse and family adjustment is an important determinant of the expatriate's adjustment. However, the literature did not indicate to what extent the organization's support of spousal adjustment relates to the expatriate's adjustment. Nor does the current literature examine the relationship between the organization's support of spousal adjustment and the expatriate's job performance. Based on the literature review, spillover theory, transaction cost theory, and organizational support theory, it was

expected that organizational support for spousal adjustment would positively account for a statistically significant amount of variance in general adjustment, interaction adjustment, work adjustment, and performance as depicted in figures 2, 3, 4, and 5.

Compensation. There is currently no research to suggest that different methods of compensation impacts either adjustment or performance. However, given spillover theory, transaction cost theory, and organizational support theory, it was expected that the method of compensation relates to both adjustment and performance. The balance sheet method of compensation is the method that attempts to keep expatriates “whole.” Based on that, it was expected that the balance sheet method would positively account for a statistically significant amount of variance in general adjustment, interaction adjustment, work adjustment, and performance as depicted in figures 2, 3, 4, and 5.

Population and Sample

This research sampled North American expatriates on-assignment in Hong Kong. While a pure random sampling of all North Americans working and living in Hong Kong was beyond the researcher’s resources, a non-probabilistic technique to identify a sampling frame was employed. The use of a non-probabilistic technique did necessarily limit the generalizability of the research results. However, access to the expatriate population using survey techniques consistent with prior research was available (McGinley, 2008). Further, “multiple regression is robust to the violation of random sampling, especially if the cases are independent” (Hayden, n.d., p. 11). The sample was randomly selected from the 2009/2010 membership directory of the American Chamber of Commerce (AMCHAM) Hong Kong. The explanation of this source and the means of contacting the participants are detailed in the Sampling Procedures section.

The primary reason for using a broad membership directory was the need to sample expatriates across several MNCs. Multiple MNCs were necessary since the variables examined involved performance interventions for those employed by organizations and the differences in adjustment and performance of those employees. Therefore, in order to obtain variance across these variables, it was necessary to identify a variety of organizations utilizing different performance interventions.

Sample Size

Multiple regression does not have specific sample size requirements. However, a larger sample size, properly sampled, usually helps to meet most assumptions (Hayden, n.d.). One sample size estimation technique suggests the ideal number of cases sampled should be at least 10 to 20 times the number of independent variables (Harrell, 2001). With five independent variables, the intent was to have 50 to 100 completed, useable surveys. A second rule of thumb for determining the sample size suggests $N \geq 50 + 8m$ (where m is the number of independent variables) for testing multiple correlation (Tabachnick & Fidell, 2007). Using that method results in an estimated 90 subjects, which is within the range of 50 to 100. Historically, expatriate survey research has attained a 20% to 30% response rate (Black & Stephens, 1989; Guzzo et al., 1994). Thus, the intent was to sample at least 250 North American expatriates working in Hong Kong, and if feasible, up to 500 North American expatriates working in Hong Kong. While the intent was to have 50 to 100 completed, useable surveys, the homogeneity of the subjects may have reduced the need for a full sample. If at least 50 valid subjects were not obtained, the statistical analysis would still have been performed, with the recognition that the regression models built would be limited by having too few cases.

Sampling Procedures

The sample size requirements and the potential difficulty in reaching the population seemed to indicate that it was best to sample expatriates that are a member of an international association, such as AMCHAM Hong Kong. A second reason for working with this type of organization to reach the sample was that the nature of the performance interventions studied involved testing for differences in organizational practices and contexts. Therefore, in order to obtain variances across these variables, it was ideal to sample expatriates from a wide range of organizations competing in different industries and utilizing different human resource development practices.

The sample was randomly drawn from the 2009/2010 AMCHAM Hong Kong membership directory. AMCHAM Hong Kong has over 1,900 members, representing over 900 different companies. North Americans represent 41% of the AMCHAM Hong Kong membership, with 35% coming from the U.S. and 6% coming from Canada (The American Chamber of Commerce in Hong Kong, 2009). Correspondingly, 38% of the companies represented by members are based in North America, with 37% of the companies coming from the U.S. and 1% coming from Canada (The American Chamber of Commerce in Hong Kong, 2009). By sampling half of the members (950), it could be expected that 389, or 41%, would be North American and qualify to participate in the study. Based on the estimated 20% to 30% response rate, that should have provided 78 to 117 subjects, which fit the desired sample size range.

Variables

The research utilized a multivariate correlational design. The five performance interventions under investigation represented the independent variables. Adjustment and

performance represented the two dependent variables, with adjustment actually serving as three separate dependent variables based on the three dimensions of adjustment (general, interaction, and work). Additionally, three control variables that potentially mediate either adjustment or performance were included as well. Table 2 summarizes the variables used and the source of the measure used to capture data for the variable. The specific instrumentation is addressed in the Instrumentation section below.

Table 2

Summary of Variables

Type	Variable	Scale	Source	Cronbach Alpha (α)
Independent	Integrated Cross-Cultural Training	Ordinal	Eschbach et al., 2001	Single-item
	Mentoring	Ordinal	Ragins et al., 2000	.79
	Role ambiguity	Ordinal	Rizzo et al., 1970	.78; .81
	Spouse and family support	Ordinal	Black & Stephens, 1989	.95
	Compensation	Nominal	New scale	Single-item
Dependent	Adjustment	Ordinal	Black & Stephens, 1989	General .82
		Interaction		.89
		Work		.91
	Performance	Scale	Black & Porter, 1991	.89
Control	Language fluency	Ordinal	Kraimer et al., 2001	Single-item
	Prior international experience	Ratio	Selmer, 2004	Single-item
	Time on assignment	Ratio	Selmer, 2004	Single-item

Independent Variables

Integrated cross-cultural training. This is an ordinal variable that depicts the level of integration and rigor in the cross-cultural training provided. The item to measure integrated cross-cultural training was derived from Eschbach et al. (2001). Respondents were asked to

identify which approach to cross-cultural training best represents the approach to training provided by their organization. The items derived from the table provided in their original study (Eschbach et al., 2001, p. 275). Table 3 details the three approaches to cross-cultural training, along with an option to select no training or only self-directed training.

Table 3

Approaches to Cross-Cultural Training

Time and Duration	Cross-Cultural Training Method/Approach	Rigor and Degree of Integration
Pre-departure Less than a week	Factual/knowledge-based: Briefing on area and cultural: climate, housing, schools type information Polite language phrases taught	Low rigor Not integrated (i.e. each subject delivered independent of each other)
Pre-departure Week to 4 weeks	Emotional/analytical: Home and host cultural awareness; critical incidents, cultural assimilators, stress reduction Language training	Moderate rigor Partially integrated (i.e. starts with factual and moves to emotional)
Pre-departure and on-site Month or more	Experiential/behavioral: Role-playing, simulations, field experiences, sensitivity training Extensive language training	High rigor Integrated (i.e. starts with factual and progresses through experiential)
None	No training or only self-directed training	N/A

Adapted from Eschbach et al. (2001, p. 275).

Mentoring. This is an ordinal variable that measures the perceived effectiveness of mentoring. Items were derived from Ragins et al.'s (2000) perceived mentoring program effectiveness scale. Respondents were asked to respond to six questions related to the effectiveness of their mentoring program using a seven-point Likert scale (1 = strongly disagree; 7 = strongly agree). An example item is "The formal mentoring program allows me access to

mentors who otherwise would have been unattainable.” The original six-item scale exhibited Cronbach’s alpha of .79 (Ragins et al., 2000).

Role ambiguity. This is an ordinal variable to measure role ambiguity. Items were derived from Rizzo et al.’s (1970) role ambiguity scale. Respondents were asked to respond to six questions that measure (1) predictability of outcomes of or responses to respondents’ behavior and (2) clarity of behavioral requirements. The questions asked respondents to respond on a seven-point scale (1 = very false; 7 = very true) to what extent the condition exists for them. An example item is “I feel certain about how much authority I have.” While the scale is called the role ambiguity scale, it actually measures role clarity, with lower scores representing role ambiguity and higher scores representing role clarity. In the development of the scale, Rizzo et al. (1970) tested two populations, reporting Cronbach’s alpha of .78 and .81 respectively for the two populations.

Spouse and family support. This is an ordinal variable to measure the organization’s support of spouse and family. Items were derived from Black and Stephens’ (1989) spousal adjustment scale. Respondents were asked to respond to nine questions that measure the extent to which they feel their organization has supported their spouses’ adjustment. The questions asked respondents to respond on a seven-point scale (1 = greatly insufficient; 7 = more than sufficient) to what extent they feel their organization directly supported their spouses’/partners’ adjustment. An example item focused on support for “socializing with host nationals.” This scale was originally employed to measure spousal adjustment. In this implementation of the scale, the focus was on the organization’s support of the spouse/partner in these areas of adjustment. The larger scale can be used as a singular adjustment scale or as two independent factors of general adjustment and interaction adjustment. The original scale reported Cronbach’s alphas at the

factor level, with a Cronbach's alpha of .86 for spousal general adjustment and .95 for spousal interaction adjustment.

Compensation. This is a nominal variable that categorizes the approach the respondents believe their organization takes to compensating them. There is currently not a reliable scale to measure compensation packages or approaches to compensating expatriates. The item to measure the approach to compensation was derived from the descriptions of the three common approaches to compensation in Sims and Schraeder (2005). Respondents were asked to identify which approach to compensation best represents the approach to their compensation taken by their organization. Table 4 details the descriptions of three approaches to compensation taken from Sims and Schraeder (2005).

Table 4

Approaches to Expatriate Compensation

Approach	Description
Balance sheet approach	My organization uses a "no gain-no loss" method of compensating me for working overseas. The idea is that I can sustain my standard of living throughout the assignment for me and/or my family, meaning we did not come out ahead or behind (financially) from the assignment. In general, the goal is to provide equivalent purchasing power abroad to help maintain my home lifestyle.
Destination-based approach	My organization uses a "when in Rome do as the Romans do" method that takes into account what competitors are paying and/or how expatriate compensation compares with the compensation levels of local employees in comparable jobs. Allowances (e.g. housing, children's education, and incentive premiums in particular) are sharply curtailed.
International headquarters approach	My organization uses an "international headquarters" approach that compensates all expatriates in equivalent positions as if we all originated from the same geographic headquarters and are being compensated on essentially the same program.

Dependent Variables

Adjustment. The first dependent variable was adjustment. However, as outlined previously, adjustment is best considered as three dimensions: general adjustment, interaction adjustment, and work adjustment. These were ordinal variables to measure adjustment. Items to measure adjustment were derived from Black and Stephens' (1989) 14-item scale to assess adjustment to the general environment, interaction with host-country citizens, and work. Respondents were asked to indicate how well adjusted they are on a seven-point scale (1 =very unadjusted; 7 = very adjusted). Several studies have confirmed the use of the three factors in this scale (e.g. Black & Gregersen, 1991; Shaffer et al., 1999). Additionally, several more recent studies continue to use this construct with acceptable reliabilities (e.g. Takeuchi et al., 2005; Kraimer & Wayne, 2004; Kraimer et al., 2001). An example item related to general adjustment focused on "housing conditions." An example item related to interaction adjustment focused on "interacting with host nationals outside of work." An example item related to work adjustment focused on "specific job responsibilities." The Cronbach's alpha in the original study for general adjustment was .82, for interaction adjustment was .89, and for work adjustment was .91.

Performance. The second dependent variable was an ordinal variable to measure perceived job performance. Items were derived from Black and Porter's (1991) self-rated performance scale. Respondents were asked to recall their most recent actual performance evaluation in their current assignment and to indicate where they believe that rating would place them relative to their peers along five dimensions: (1) overall performance, (2) ability to get along with others, (3) completing tasks on time, (4) quality (as opposed to quantity), and (5) achievement of work goals. The measure asked respondents to indicate the percentage of their work peers that would be below them (e.g. a 75% on overall performance would indicate that a

respondent believes that 75% of the respondent's peers are below his or her rating and 25% of peers are above his or her rating). The Cronbach's alpha for Black and Porter's (1991) original sample of American expatriates in Hong Kong was .89.

Control Variables

Three control variables, commonly used in expatriate adjustment and performance research, were utilized. Language fluency was measured by asking respondents to indicate on a five-point scale (1 = not at all; 5 = fluently) how well they speak the host-country language (Kraimer et al., 2001). Prior international experience may also have an impact on adjustment, as prior experience may have some impact on adjustment to participants' current assignment (Shaffer & Harrison, 1998). To measure prior international experience, respondents were asked to indicate if they have had any prior foreign assignments, and if so, how many years have they been assigned abroad (Selmer, 2004). Finally, total time on current assignment was a relevant control variable, since adjustment is a process over time (Black & Mendenhall, 1991). Respondents were asked how long, in years and months, they have been on their current assignment in Hong Kong, with the final variable being converted into years.

Instrumentation

The instrument utilized in this study was a web-based survey, with invitations sent to prospective participants via e-mail. The construction of the questionnaire was a combination of multiple scales from other research in the literature, as described in the Variables section above. The final questionnaire was comprised of 47 self-report questions, originally anticipated to take 20-minutes to complete. Appendix A provides a copy of the full questionnaire.

The first page of the web-based survey contained the informed consent. Appendix B contains a copy of the informed consent provided to the sample receiving the web-based survey.

The risk was minimal and confidentiality was assured, but ethical guidelines dictate that participants be given the choice of opting in or out of the survey.

Finally, participants were offered an incentive to participate. The incentive was the opportunity to enter a drawing for an evening for two at Isola. Isola is a highly-rated, trendy restaurant in Central Hong Kong. Participation in the survey was voluntary, and participation in the drawing was voluntary as well. To participate in the drawing, participants were asked to provide their e-mail address.

Pilot Study

Prior to conducting the full study, a small pilot study was conducted. The researcher has a close contact with an expatriate manager in Hong Kong. The plan was for this individual and two to four expatriate friends in Hong Kong to review the survey instrument. Their review of the instrument included the readability of the instrument to help ensure that the instrument was understandable to participants. Secondly, those in the pilot study were asked to consider the face validity of the instrument. Lastly, those in the pilot study were asked to provide an estimated amount of time to complete the survey. The results of the pilot study determined whether the instrument underwent minor modifications or not. While the pilot study was based on a small convenience sample, it was designed to help ensure that the survey instrument yielded valid results.

Procedures

A direct-contact method, via e-mail, was used to contact the sample with an invitation to participate. To administer the web-based survey instrument via e-mail invitation, the following procedures dictated below were followed:

1. The survey was loaded into the Qualtrics web-based survey platform.

2. The e-mail addresses of all members of the sample were loaded into the Qualtrics survey platform.
3. Prior to sending the invitation and link to the web-based survey, the sample received a pre-contact letter (see Appendix C) informing them of the forthcoming web-based survey.
4. One week later, the sample was e-mailed a link to the web-based survey with a cover letter (see Appendix D) explaining the purpose and procedures for the web-based survey.
5. One week later, a follow-up e-mail with a link to the web-based survey and a follow-up cover letter (see Appendix E) was sent to all non-respondents.
6. The following week, a final follow-up e-mail with a link to the web-based survey and another copy of the same follow-up cover letter (see Appendix E) was sent to all remaining non-respondents.
7. Two weeks after the final follow-up e-mail, the link to the web-based survey was closed, accepting no further survey completions.
8. Once all data was collected, the e-mail addresses of participants voluntarily providing their e-mail address for the incentive drawing were collected.
9. Once the e-mail addresses were collected from completed surveys, the e-mail addresses were completely disconnected from the data file to help further ensure confidentiality of results.
10. All participating e-mail addresses were numbered, and the winning e-mail address was randomly selected by using a random number generator.
11. The winner, whose e-mail address was selected, was contacted to arrange for sending the gift certificate to Isola.

Data Analysis

Once all the data was collected from the respondents, the data analysis occurred. First, the data was reviewed to ensure that it was complete and accurate. For instance, if a non North American completed the survey, their response was removed from the sample. Next, descriptive statistics were run to describe the sample, including response rate, prior international experience, and the amount of time on-assignment in Hong Kong.

The next step of the analysis was to run a Cronbach's alpha on each of the scales. This was to confirm that the scales still exhibited the same expected internal reliability as from previous studies. From there, individual scale scores were generated. Table 5 outlines how the scale scores were calculated for each variable.

Due to the compensation variable being a nominal variable, the next step was to code and block the compensation variable for use in multiple regression. The compensation variable had three possible values. However, none of the values had much meaning in a multiple regression equation. In order to use a nominal variable in regression, it must be contrast coded in a meaningful way (Tabachnick & Fidell, 2007). Table 6 depicts how this variable was coded. The three compensation variables were then treated as a block because they were really one variable that had been partitioned into the contrast values.

Once the data was calculated, coded, and ready for analysis, the independent and dependent variables were tested for normality. The independent variables and dependent variables were also placed on a scatter plot to see that they had a linear relationship. Tests to detect any existence of heteroscedasticity were also conducted. If the homoscedasticity assumption was violated, it could be remedied by means of data transformations (Tabachnick & Fidell, 2007).

Table 5

Scale Score Calculations

Variable		Score Calculation
Integrated Cross-Cultural Training		N/A – single-item
Mentoring		1. Reverse scored item 6 on this scale 2. Averaged responses to the 6 items
Role ambiguity		Averaged responses to the 6 items
Spouse and family support		Averaged responses to the 9 items
Compensation		N/A – single-item
Adjustment	General	Averaged responses to items 1 through 7
	Interaction	Averaged responses to items 8 through 11
	Work	Averaged responses to items 12 through 14
Performance		Averaged responses to the 5 items
Language fluency		N/A – single-item
Prior international experience		N/A – captured in years
Time on assignment		Converted years to months and summed total number of months

Table 6

Meaningful Contrast Coding of Compensation Variable

Nominal Independent Variable, Compensation, Entered as a Block			
	Balance-sheet Approach	Destination-based Approach	International Headquarters Approach
Balance-sheet Approach	1	0	0
Destination-based Approach	0	1	0

Once the assumptions of multiple regression were satisfied, the multiple regression equations were run. The four hypotheses made predictions about the regression models to emerge for each of the four different dependent variables. Four different multiple regressions were run using the standard regression method. Using this method provided the unique contribution of each independent variable when combined with all the other independent variables (Tabachnick & Fidell, 2007). While not all four hypotheses expected each of the independent variables to be included in the final regression model, all of the independent variables were entered into the equation, expecting that those independent variables not hypothesized to impact the dependent variable would not show a statistically significant contribution to the variance in the dependent variable. Additionally, the control variables were also entered into the equation as well. These variables are not under investigation in this study, but the literature suggested that they may explain some of the variation in the dependent variables. To ensure that the unique contributions of the independent variables under investigation were optimally explained, it seemed prudent to include the control variables in the standard regression equation. Doing so helped the models to be more completely specified and have greater external validity (Tabachnick & Fidell, 2007).

The error rate, or alpha, used in this investigation was .05. The risk of a Type II error was low from a practical standpoint, primarily because it does not change any current human resource development practices. There is greater risk of a Type I error because that may result in inappropriate and potentially costly changes to current organizational practices. Due to the lower risk associated with making a Type I error, the .05 level was appropriate. Additionally, an alpha level of .05 was most common in the studies contained in the literature review related to the expatriate population.

Limitations

Using the multiple regression method had a few expected limitations. Any resulting regression model can only say that the given set of independent variables explains the variance in the dependent variable, as the inclusion or exclusion of other independent variables could change the regression model. Second, the results of multiple regression are limited to correlation only, as correlation does not assume causation. Another limitation was that the results are limited by the sample selected, and while care was taken to capture a sample that is representative of the total population, caution is necessary, as results are not necessarily generalizable to the full population.

CHAPTER 4

FINDINGS AND DATA ANALYSIS

This chapter details the findings and data analysis performed on the data collected from the survey instrument administered to those listed in the 2009/2010 membership directory of AMCHAM Hong Kong. A standard multiple regression was performed for each of the four hypothesized regression models, with the dependent variables as general adjustment, interaction adjustment, work adjustment, and perceived performance respectively. Analysis was performed using SPSS regression and SPSS explore for evaluation of assumptions.

Results of Pilot Study

Prior to conducting the full study, a small pilot study was conducted with three participants. The researcher used an expatriate manager contact in Hong Kong who recruited one other expatriate in Hong Kong to review the survey instrument. The researcher also had a colleague with experience in cross-cultural development who agreed to review the survey as well. Their review of the instrument focused on the readability of the instrument, face validity of the instrument, and estimated time to complete the instrument. Based on the results of the pilot study, the instrument underwent minor modifications.

The pilot study required an average of five minutes to complete, with nine minutes being the longest time required. All three of the participants indicated that the instrument had face validity. Four key points regarding readability were made by the participants. First, the

participants stated that the instrument “seemed easy to complete,” requiring no response or adjustment of the instrument. Second, the participants stated the instrument “was short and simple.” With these statements and the average being five minutes and the longest being nine minutes, the estimated time to complete listed on the invitations to participate and informed consent was reduced from the original 20 minutes to read “approximately 10 minutes.” Third, the participants stated that the mentoring program section was awkward, and they suggested changing the word “formal” to “official” as well as provide the opportunity to skip the section if the company did not have a mentoring program. As a result of this feedback, skip logic for participants whose organization did not provide a mentoring program was added, and the mentoring section was moved to near the end of the instrument to help avoid dropouts if confusion occurred. Finally, the participants thought item six on the role ambiguity scale seemed duplicative. No changes were made to the instrument though as role ambiguity is a reliable and valid scale used in several studies, and the participants suggested that this was a minor concern.

Sample

A direct-contact method, via e-mail, was used to contact the sample with an invitation to participate and complete the survey instrument. While a pure random sampling of all North Americans working and living in Hong Kong was beyond the researcher’s resources, a non-probabilistic technique to identify a sampling frame was employed. The use of a non-probabilistic technique did necessarily limit the generalizability of the research results, but access to an expatriate population was available using survey techniques consistent with prior research (McGinley, 2008). Further, “multiple regression is robust to the violation of random sampling, especially if the cases are independent” (Hayden, n.d., p. 11).

The sample was drawn from the 2009/2010 AMCHAM Hong Kong membership directory. Of the AMCHAM Hong Kong members listed in the directory, 912 had valid e-mail addresses listed. As a result, all 912 were included in the sample. North Americans represent 41% of the AMCHAM Hong Kong membership (The American Chamber of Commerce in Hong Kong, 2009). With 912 members having valid e-mails listed, 374, or 41%, were North American and qualified to participate in the study. Ninety-six North Americans started the survey, with 88 valid, useable surveys being completed for a response rate of 23.5%, which is within the typical 20% to 30% average response rate for expatriate survey research (Black & Stephens, 1989; Guzzo et al., 1994).

Multiple regression does not have specific sample size requirements. One sample size estimation technique was that the ideal number of cases sampled should be at least 10 to 20 times the number of independent variables (Harrell, 2001). With five independent variables, 88 completed, useable surveys met the requirement of 50 to 100 surveys derived from that estimation technique.

The participants in the sample represented a breadth of experience. Sixty percent of the participants had prior international experience. The average number of years working abroad prior to the current assignment in Hong Kong was 15.24 years, with a range from 2 years to 34 years. The average tenure on the current assignment in Hong Kong was 8.39 years, with a range of less than one year in Hong Kong to 40 years on assignment in Hong Kong. Lastly of note, 61 individuals provided e-mail addresses to participate in the random drawing. One winner was selected, and Isola in downtown Hong Kong delivered the gift certificate to that individual.

Variables

This research examined five independent variables, three control variables, and four different dependent variables (one for each of the four hypothesized regression models). Table 7 presents the summary of valid cases by variable, including the number of cases with missing data for each variable. Of particular note in this table is the Mentoring scale with only 15 valid cases. The reason for this is that only 15 participants indicated that their organization had an official mentoring program, resulting in only those individuals completing the mentoring scale section of the survey instrument.

Table 7

Valid Cases by Variable

	Valid		Cases Missing		Total	
	N	Percent	N	Percent	N	Percent
Integrated Cross-Cultural Training	88	100.0%	0	.0%	88	100.0%
Role ambiguity	84	95.5%	4	4.5%	88	100.0%
Spouse and family support	84	95.5%	4	4.5%	88	100.0%
Mentor program Y/N	88	100.0%	0	.0%	88	100.0%
Mentoring	15	17.0%	73	83.0%	88	100.0%
Compensation	87	98.9%	1	1.1%	88	100.0%
General adjustment	84	95.5%	4	4.5%	88	100.0%
Interaction adjustment	84	95.5%	4	4.5%	88	100.0%
Work adjustment	84	95.5%	4	4.5%	88	100.0%
Performance	83	94.3%	5	5.7%	88	100.0%
Language fluency	88	100.0%	0	.0%	88	100.0%
Prior international experience	88	100.0%	0	.0%	88	100.0%
Time on assignment	86	97.7%	2	2.3%	88	100.0%

Independent Variables

Table 8 provides the descriptive statistics for four of the independent variables. Integrated cross-cultural training indicates the mean level of rigor and integration in the cross-cultural training provided to the expatriate, with one representing no training and four representing highly rigorous and integrated training. The role ambiguity, spouse and family support, and mentoring means are the means of the composite scales for those items. All the scales range from a low of one to a high of seven. Of importance is that the role ambiguity scales is reversed, with scores closer to one representing role ambiguity and scores closer to seven representing role clarity. Compensation was a nominal variable, so means are not reported.

Table 8

Descriptives for Independent Variables

	Mean	Standard Deviation	N
Integrated Cross-Cultural Training	1.38	.81	88
Role Ambiguity	5.71	.98	84
Spouse and family support	4.33	1.60	84
Mentoring	4.23	.50	15

Table 9 presents the frequency of the three compensation approaches. Due to only 15 individuals indicating that their organization had an official mentoring program, the mentoring scale was not used in the data analysis. Rather, a dichotomous variable was used that indicated whether the participant had an official mentoring program or not. As noted, 73 participants' organizations did not have a mentoring program, and 15 participants' organizations did have a mentoring program.

Table 9

Frequencies for Compensation Variable

Compensation Approach	Frequency	Percent
Balance sheet approach	39	44.8%
Destination-based approach	35	40.2%
International headquarters approach	13	15.0%

n=87

Three of the independent variables came from existing scales derived from the literature. Table 10 presents the Cronbach's alpha conducted to test the reliability for each independent variable scale. Due to the low numbers of individuals completing the mentoring scale, a Cronbach's alpha was not conducted, and the scale was not used in the analysis. As can be seen, the role ambiguity and spouse and family support scales exhibited high internal reliability with $\alpha = .95$ and $\alpha = .96$ respectively. These findings confirm and enhance the results of the prior studies that developed the scales.

Table 10

Cronbach Alpha (α) for Independent Variables

	Source	Cronbach Alpha (α) Source Study	Cronbach Alpha (α) This Study
Mentoring	Ragins et al., 2000	.79	N/A
Role ambiguity	Rizzo et al., 1970	Sample 1: .78 Sample 2: .81	.93
Spouse and family support	Black & Stephens, 1989	.95	.96

Dependent Variables

Table 11 provides the descriptive statistics for the dependent variables. General adjustment represents the self-reported level of adjustment to the non-work environment. Interaction adjustment represents the self-reported level of adjustment to interaction with host nationals. Work adjustment represents the self-reported adjustment to the actual work assignment. Performance represents the self-reported performance level in comparison to others in the organization. The means for all four dependent variables are the means of the composite scales for those items.

Table 11

Descriptives for Dependent Variables

	Mean	Standard Deviation	N
General Adjustment	5.91	.96	84
Interaction Adjustment	5.52	1.46	84
Work Adjustment	5.89	1.12	84
Performance	80.82	11.94	83

The dependent variables came from existing scales derived from the literature. Table 12 presents the Cronbach's alpha conducted to test the reliability for each dependent variable scale. As can be seen, all four scales exhibited high internal reliability, with $\alpha > .90$ for each scale. These findings confirm and enhance the results of the prior studies that developed the scales.

Table 12

Cronbach Alpha (α) for Independent Variables

	Source	Cronbach Alpha (α) Source Study	Cronbach Alpha (α) This Study
General Adjustment		.82	.93
Interaction Adjustment	Black & Stephens, 1989	.89	.96
Work Adjustment		.91	.95
Performance	Black & Porter, 1991	.89	.90

Data Preparation

Data were first analyzed for missing data. Very little data were missing, but there were cases with missing data elements. There was no observable pattern of missing data, meaning data was missing at random. The strategy developed for missing data was based on the type of variable, using methods from Tabachnick and Fidell (2007). First, cases with no data for dependent variables were removed. For single-item independent variables, missing data was left missing. For independent variables derived from scales, the average for the scale was developed based on the non-missing data in the scale. Dependent variables with missing data within the scales followed the same average calculation. If at least one dependent variable had useable data, the case was kept, but if no data for dependent variables was useable, the whole case was deleted. The only control variable with missing data was tenure on the current assignment. A 0 was inserted for the cases with missing data for this variable. Finally, in processing the statistical analysis, pairwise exclusion of cases was employed.

Once missing data were addressed, variables were then calculated or coded from the data for analysis. The integrated cross-cultural training variable was re-coded with item 4 being made

a 1, as it related to no training being provided by the organization. Scores of 1 were recoded as 2, 2 recoded as 3, and 3 recoded as 4. This created an ordinal variable moving from no training to fully integrated and rigorous cross-cultural training.

The mentoring scale was calculated, but due to the low number of participants indicating their organization had an official mentoring program, a dichotomous variable to capture whether the organization had an official mentoring program or not was created for use in analysis. Yes responses to having a mentoring program were coded as 0, and no responses were coded as 1.

The role ambiguity scale was calculated as an average of the responses to the six items on the scale. The spouse and family support scale was also an average, averaging the nine responses on the scale. The compensation variable was a three item nominal variable, requiring it to be contrast coded into two new blocks of variables. Table 6 in the Methodology section depicts the coding of the new compensation variables.

The adjustment and performance variables were calculated as averages of the items in the scale. General adjustment was an average of the first seven items in the adjustment scale. Interaction adjustment was an average of items eight to 11. Work adjustment was an average of items 12 to 14. Performance was an average of the five items in the performance scale.

Language fluency required no calculation or coding, as it was a single-item. While prior international experience was captured in years, a dichotomous yes or no variable was created to indicate whether the participant had prior experience. Yes responses to having prior international experience were coded as 0, and no responses were coded as 1. Finally, time on assignment was captured in years and months, and it was converted into years.

Analytical Diagnostics

The data was first for outliers. Univariate outliers were examined using both boxplots and an analysis of *Z* scores. Items beyond the whiskers of the boxplots for each variable and items with a *Z* score greater than 2.5 (Hair, Anderson, Tatham, & Black, 1998) were compared for similarities. There were a few univariate outliers identified. Rather than eliminating the whole case, these variables were treated as missing.

Multivariate analysis of outliers was then conducted. Mahalanobis Distances were calculated for each variable and compared to the critical value. The critical value, 20.515, was determined with a chi-square criterion, with degrees of freedom equal to the number of independent variables (5) at $\alpha p < .001$ (Meyers, Gamst, & Guarino, 2006). One case had the dependent variables exceeding the critical value. That case was eliminated from the analysis.

With outliers addressed, variables were examined for normality, examining skewness and kurtosis, stem-and-leaf plots, and histograms. One independent variable, role ambiguity, all four dependent variables, and two control variables, language fluency and time on assignment in Hong Kong, did not exhibit normality. Tabachnick and Fidell (1996) provide suggested transformations based on the distribution of scores (p. 79). Table 13 outlines the variables and the transformations conducted to help the data exhibit normality.

Table 13

Data Transformations for Non-Normal Data

Variable	Data Transformation
Role Ambiguity	Reflect and square root $\frac{X - K}{K + 1}$, where K = largest possible value + 1
General Adjustment Interaction Adjustment Work Adjustment	Reflect and logarithm $\frac{X - K}{K + 1}$, where K = largest possible value + 1
Language Fluency	Square root
Time on Assignment	Logarithm

Spearman's correlation coefficients were also examined between all pairs of the variables to measure association. Spearman's was appropriate due to the ordinal variables (Norusis, 2006). None of the pairs of variables exhibited high correlation. Lastly, tests of multicollinearity were conducted. Both tolerance and the variance inflation factor (VIF) were examined. Tolerance values of .01 or less and VIF values greater than 10 are indicative of multicollinearity (Meyers et al., 2006). Tolerance and VIF were well within normal bounds, suggesting multicollinearity was not present among the independent variables.

Hypotheses Testing

Four different regression models were hypothesized with four different dependent variables. The purpose of each of the hypotheses was to provide insight into the two guiding research questions. The specific research questions to be answered in this study included:

- (1) How do the examined performance interventions impact each of the three dimensions of expatriate adjustment?

(2) How do the examined performance interventions impact expatriates' perceived performance?

Hypotheses one, two, and three related to the first question. Hypothesis four related to the second question.

Hypothesis One Regression Model

H1: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with general adjustment.

Table 14

Summary of Regression Models to Test Hypothesis One

Model	R	R ²	Standard Error of the Estimate	F	Sig.	Durbin- Watson
1	.337 ^(a)	.114	.18722	1.872	.110	
2	.386 ^(b)	.149	.18468	2.107	.063	
3	.413 ^(c)	.170	.18632	1.574	.141	
4	.370 ^(d)	.137	.18104	6.039	.004	2.063

a Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support

b Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity

c Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity, Prior international experience, Language fluency, Time on assignment

d Predictors: (Constant), Spouse/family support, Role ambiguity

To test hypothesis one, multiple regressions were run. Table 14 provides a summary of the regressions run to test the hypothesis. The multiple regression was first run with just the four hypothesized variables. This model did not exhibit significance with $p > .05$. Thus, the hypothesized regression model was not accepted. The second model added the remaining independent variable, role ambiguity. The addition of this variable improved R² to .149 and significance to $p = .063$, but the model still failed to exhibit significance at the $p > .05$ level. The

third model added the three control variables. With the addition of these three variables, R^2 increased to .170, but the significance level was impacted, changing to $p = .141$.

Based on the significance of the individual variables in the previous model runs, the final regression model with only the spouse and family support and role ambiguity variables was developed. This model had $R^2 = .137$ and $p = .004$, showing the regression was significantly different from zero, $p < .01$. The R^2 of .137 indicates that 13.7% of the variability in general adjustment was related to spouse and family support and role ambiguity.

Table 15 displays the correlations between the variables, the unstandardized regression coefficients (B), the standardized regression coefficients (β), R^2 , and adjusted R^2 . Spouse and family support exhibited the strongest relationship with general adjustment with $\beta = -.270$ at $p < .05$. The negative β actually shows a positive relationship as general adjustment was transformed by reflecting the variable and taking the logarithm, where spouse and family support was not transformed. Although the bivariate correlation between general adjustment and role ambiguity was statistically different from zero using a post hoc correction, $r = .259$, $F(2, 78) = 2.732$, $p < .01$, role ambiguity did not contribute significantly to the regression model. Apparently, the relationship between general adjustment and role ambiguity was mediated by the relationships between spouse and family support and general adjustment.

Table 15

Multiple Regression Model for General Adjustment

Variables	General Adjustment ^(a) (DV)	Spouse / family support	Role ambiguity ^(a)	B	β
Spouse / family support	-.310			-.032	-.270*
Role ambiguity ^(a)	.259	-.193		.125	.206
Means	.274	4.313	1.479		
Standard deviations	.192	1.605	.318		
				R ²	.137
				Adjusted R ²	.114
				R	.370**

a. transformed variables

* $p < .05$

** $p < .01$

Hypothesis Two Regression Model

H2: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with interaction adjustment.

Table 16

Summary of Regression Models to Test Hypothesis Two

Model	R	R ²	Standard Error of the Estimate	F	Sig.	Durbin- Watson
1	.418 ^(a)	.175	.22740	3.089	.014	
2	.489 ^(b)	.239	.21985	3.771	.003	
3	.576 ^(c)	.331	.21051	3.801	.001	
4	.560 ^(d)	.313	.20743	6.658	.000	1.812

a Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support

b Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity

c Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity, Prior international experience, Language fluency, Time on assignment

d Predictors: (Constant), Compensation block, Spouse/family support, Role ambiguity, Language fluency

To test this hypothesis, multiple regressions were run. Table 16 provides a summary of the regressions run to test the hypothesis. The regression was first run with just the four hypothesized variables. This model did exhibit significance with $p < .05$. Thus, the hypothesized regression model was accepted. To determine the impact of the remaining independent variable, role ambiguity was added in the second model. The addition of this variable improved R² to .239 and increased the significance level to $p = .003$, exhibiting significance at the $p > .01$ level. The third model added the three control variables. With the addition of these three variables, R² increased to .331 and further increased the significance level to $p = .001$.

Finally, based on the significance of the individual variables in the previous model runs, the final regression model was developed to be lean with fewer variables in the model. This

model, including compensation, spouse and family support, role ambiguity, and language fluency, had R^2 .313 and $p = .000$, showing the regression was significantly different from zero, $p < .001$. The R^2 of .331 indicates that nearly one-third of the variability in interaction adjustment was related to compensation, spouse and family support, role ambiguity, and language fluency.

Table 17 displays the correlations between the variables, the unstandardized regression coefficients (B), the standardized regression coefficients (β), R^2 , and adjusted R^2 . Spouse and family support, $\beta = -.330$ at $p < .01$, role ambiguity, $\beta = .291$ at $p < .01$, and language fluency, $\beta = -.297$ at $p < .01$, exhibited the strongest relationships with interaction adjustment. The negative β for spouse and family support actually shows a positive relationship as interaction adjustment was transformed by reflecting the variable and taking the logarithm, where spouse and family support was not transformed. The role ambiguity variable actually measures the direct opposite, role clarity, so the positive β for role ambiguity suggests a negative relationship between role ambiguity and interaction adjustment. Finally, the negative β for language fluency actually shows a positive relationship as interaction adjustment was transformed by reflecting the variable and taking the logarithm, where language fluency was not transformed. Compensation approach did not contribute significantly to the regression model. Apparently, the relationship between interaction adjustment and compensation approach was mediated by the relationships between the other variables in the final model and interaction adjustment.

Table 17

Multiple Regression Model for Interaction Adjustment

Variables	Interaction adjustment ^(a) (DV)	Compensation block 1	Compensation block 2	Spouse / family support	Role ambiguity ^(a)	Language fluency	B	β
Compensation block 1	.183						.134	.276
Compensation block 2	-.016	-.737					.078	.160
Spouse / family support	-.335	.047	-.152				-.050	-.330*
Role ambiguity ^(a)	.308	-.042	.027	-.193			.221	.291*
Language fluency	-.220	-.177	.104	-.213	.132		-.162	-.297*
Means	.3257	-	-	4.313	1.479	1.455		
Standard deviations	.242	-	-	1.605	.318	.443		
							R ²	.313
							Adjusted R ²	.266
							R	.560**

a. transformed variables

* $p < .01$

** $p < .001$

Hypothesis Three Regression Model

H3: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with work adjustment, while role ambiguity exhibits a negative relationship with work adjustment.

As noted previously, the role ambiguity variable actually measures the direct opposite, role clarity, so the positive statistical relationship between role ambiguity and interaction adjustment would support this hypothesis.

Table 18

Summary of Regression Models to Test Hypothesis Three

Model	R	R ²	Standard Error of the Estimate	F	Sig.	Durbin- Watson
1	.731 ^(a)	.534	.15814	13.765	.000	1.592

a Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity

To test this hypothesis, multiple regressions were run. Table 18 provides a summary of the regressions run to test the hypothesis. The regression was first run with just the five hypothesized variables. This model did exhibit significance with $p < .001$. Thus, the hypothesized regression model was accepted with an R^2 of .534. To determine the impact of the control variables, they were added in the second model. The addition of the control variables only improved R^2 to .544, but the significance level did not change, as it was already $p < .001$. Thus, the first regression model without the control variables included was accepted.

This model had R^2 .534 and $p = .000$, showing the regression was significantly different from zero, $p < .001$. The R^2 of .534 indicates that over half of the variability in work adjustment is related to compensation, spouse and family support, role ambiguity, integrated cross-cultural training, and mentoring. Table 19 displays the correlations between the variables, the

unstandardized regression coefficients (B), the standardized regression coefficients (β), R^2 , and adjusted R^2 . Compensation approach, $\beta = .206$ at $p < .10$, spouse and family support, $\beta = -.208$ at $p < .05$, and role ambiguity, $\beta = .620$ at $p < .001$, exhibited the strongest relationships with interaction adjustment. As mentioned in hypothesis two, the negative β for spouse and family support actually shows a positive relationship as interaction adjustment was transformed by reflecting the variable and taking the logarithm, where spouse and family support was not transformed. Although the bivariate correlation between work adjustment and integrated cross-cultural training was statistically different from zero using a post hoc correction, $r = -.230$, $F(4, 78) = 1.033$, $p < .01$, integrated cross-cultural training did not contribute significantly to the regression model. Similarly, the bivariate correlation between work adjustment and mentoring was also statistically different from zero using a post hoc correction, $r = .254$, $F(4, 78) = 1.276$, $p < .01$, mentoring did not contribute significantly to the regression model. Apparently, the relationship between work adjustment and both integrated cross-cultural training and mentoring was mediated by the relationships between compensation approach, spouse and family support, and role ambiguity.

Table 19

Multiple Regression Model for Work Adjustment

Variables	Work adjustment ^(a) (DV)	Compensation block 1	Compensation block 2	Spouse/ family support	Role ambiguity ^(a)	Integrated CCT	Mentoring	B	β
Compensation block 1	.017							.092	.206*
Compensation block 2	.107	-.737						.093	.206*
Spouse / family support	-.368	.047	-.152					-.029	-.208**
Role ambiguity ^(a)	.671	-.042	.027	-.193				.434	.620***
Integrated CCT	-.230	.068	-.108	.216	-.218			-.012	-.042
Mentoring	.254	-.177	.104	-.213	.214	.000		.016	.027
Means	.266	-	-	4.313	1.479	1.360	-		
Standard deviations	.242	-	-	1.605	.318	.792	-		
								R ²	.534
								Adjusted R ²	.495
								R	.731***

a. transformed variables

* $p < .10$

** $p < .05$

*** $p < .01$

Hypothesis Four Regression Model

H4: Integrated cross-cultural training, formal mentoring, spouse/family support, and the balance-sheet approach to compensation all exhibit a positive relationship with perceived performance, while role ambiguity exhibits a negative relationship with perceived performance.

As noted previously, the role ambiguity variable actually measures the direct opposite, role clarity, so the positive statistical relationship between role ambiguity and interaction adjustment would support this hypothesis.

Table 20

Summary of Regression Models to Test Hypothesis Four

Model	R	R ²	Standard Error of the Estimate	F	Sig.	Durbin- Watson
1	.472 ^(a)	.223	1.27571	3.394	.005	
2	.511 ^(b)	.262	1.27075	2.676	.010	
3	.509 ^(c)	.259	1.25471	3.493	.003	1.811

a Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity

b Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity, Prior international experience, Language fluency, Time on assignment

c Predictors: (Constant), Compensation block, Mentoring, Integrated CCT, Spouse/family support, Role ambiguity, Language fluency

To test this hypothesis, multiple regressions were run. Table 20 provides a summary of the regressions run to test the hypothesis. The regression was first run with just the five hypothesized variables. This model did exhibit significance with $p < .01$. Thus, the hypothesized regression model was accepted with an R² of .223. To determine the impact of the control variables, they were added in the second model. The addition of the control variables improved R² to .262, but the significance level did increase from $p = .005$ to $p = .01$.

Based on the significance of the individual variables in the previous model runs, the final regression model, eliminating two of the control variables, prior international assignments and

time on assignment, was developed. This model had R^2 .259 and $p = .003$, showing the regression was significantly different from zero, $p < .01$. This model was accepted due to the improved R^2 and the lower p value. The R^2 of .259 indicates that 25.9% of the variability in performance was related to integrated cross-cultural training, spouse and family support, mentoring, compensation approach, role ambiguity, and language fluency.

Table 21 displays the correlations between the variables, the unstandardized regression coefficients (B), the standardized regression coefficients (β), R^2 , and adjusted R^2 . Role ambiguity, $\beta = .446$ at $p < .01$ and language fluency, $\beta = -.199$ at $p < .10$, exhibited the strongest relationships with performance. The negative β for language fluency actually shows a positive relationship as performance was transformed by reflecting the variable and taking the logarithm, where the language fluency variable was not reflected in its transformation. The other variables in the model did not exhibit a significant relationship with performance. However, the relationship between performance and the other three variables in the regression model seems to have been mediated by the relationships between role ambiguity and language fluency.

Table 21

Multiple Regression Model for Perceived Performance

Variables	Perceived Performance ^(a) (DV)	Compensation block 1	Compensation block 2	Spouse/ family support	Role ambiguity ^(a)	Integrated CCT	Mentoring	Language Fluency	B	β
Compensation block 1	.009								.159	.064
Compensation block 2	.045	-.737							.184	.066
Spouse / family support	-.180	.047	-.152						-.120	-.139
Role ambiguity ^(a)	.448	-.042	.027	-.193					1.946	.446**
Integrated CCT	-.192	.068	-.108	.216	-.218				-.131	-.075
Mentoring	.084	.075	-.019	-.399	.214	.000			-.245	-.065
Language fluency ^(a)	-.110	-.177	.104	-.213	.132	-.068	.023		-.624	-.199*
Means	4.164	-	-	4.313	1.479	1.360	-			
Standard deviations	1.390	-	-	1.605	.318	.792	-			
									R ²	.259
									Adjusted R ²	.185
									R	.509***

a. transformed variables

* $p < .10$

** $p < .01$

*** $p < .001$

Summary of Results

Four different regression models were hypothesized with four different dependent variables. Hypothesis one examined the relationship between independent variables and general adjustment. Hypothesis one was not accepted as originally stated. However, a regression model with only the spouse and family support and role ambiguity variables was developed. This model had $R^2 = .137$ and $p = .004$, showing the regression was significantly different from zero, $p < .01$.

Hypothesis two examined the relationship between independent variables and interaction adjustment. Hypothesis two was accepted as originally stated with $p < .05$. However, a leaner regression model with fewer variables in the model was developed. This model, including compensation, spouse and family support, role ambiguity, and language fluency, had had $R^2 .313$ and $p = .000$, showing the regression was significantly different from zero, $p < .001$.

Hypothesis three examined the relationship between independent variables and work adjustment. Hypothesis three was accepted as originally stated with $p < .001$ and R^2 of .534. This model included integrated cross-cultural training, mentoring, spouse and family support, role ambiguity, and compensation approach as independent variables.

Hypothesis four examined the relationship between independent variables and performance. Hypothesis four was accepted as originally stated with $p < .01$. However, a regression model including language fluency as a control variable had $R^2 .259$ and $p = .003$, showing the regression was significantly different from zero, $p < .01$. Along with language fluency, this model included integrated cross-cultural training, mentoring, spouse and family support, role ambiguity, and compensation approach as independent variables.

CHAPTER 5

DISCUSSION, CONCLUSIONS, AND RECOMMENDATIONS

This research examined the relationship between post-arrival performance interventions and the adjustment and perceived performance of North American expatriates working and living in Hong Kong. The research focused on an integrated view of multiple post-arrival performance interventions to examine their combined impact. This research provides information to organizations regarding strategies to improve the adjustment and performance of their expatriates.

A multivariate design was used to describe the dynamics underlying the dimensions of adjustment and performance by indicating which of the performance interventions in combination were more strongly associated with adjustment and performance. To gather data, a questionnaire comprised of several existing constructs derived from the extant literature was developed and administered to those listed in the 2009/2010 American Chamber of Commerce Hong Kong membership directory. Specifically, the research examined the relationship with integrated cross-cultural training, mentoring, role ambiguity, spouse and family support, and compensation.

Four different multiple regression models were developed. The final general adjustment regression model showed a relationship with spouse and family support and role ambiguity. The final interaction adjustment regression model showed a relationship with role ambiguity, spouse

and family support, compensation, and the control variable language fluency. The final work adjustment regression model showed a relationship with integrated cross-cultural training, mentoring, role ambiguity, spouse and family support, and compensation. Lastly, the final perceived performance regression model showed a relationship with integrated cross-cultural training, mentoring, role ambiguity, spouse and family support, compensation, and language fluency.

The results suggest that it is important for multi-national corporations to consider post-arrival performance interventions in addition to pre-departure interventions. Specifically, two primary areas emerged with high significance. First, reducing role ambiguity has a significant relationship with all three adjustment constructs and perceived performance. Second, the findings lend support to the concept of organizations providing additional support to the spouse and family as a means of increasing adjustment and performance of expatriates.

Adjustment

Adjustment is a multi-dimensional concept (Black et al., 1991). Adjustment has been shown to have three distinct dimensions: work adjustment, interaction adjustment with host nationals, and general adjustment to the non-work environment (Black et al., 1991), with support for the three distinct dimensions of adjustment found in several studies (Black, 1988; Black & Gregersen, 1991; Shaffer et al., 1999). While the intent of this study was not to examine the three dimensions, the results of the adjustment scales used in this study concur with prior findings of the three dimensions.

General Adjustment

The scale used to measure adjustment derived from Black and Stephens' (1989) original adjustment scale. That scale subsequently has three unique sub-scales. General adjustment is one

of the sub-scales that have shown to be reliable in numerous prior studies in the literature. This study also showed the general adjustment sub-scale to exhibit high internal reliability. Actually, this study exhibited a much higher level of reliability than Black and Stephens' (1989) original study, further validating the general adjustment sub-scale.

The final multiple regression model for general adjustment only had two variables included. Spouse and family support was the only variable that exhibited statistical significance though. While role ambiguity did not exhibit a statistical relationship, the relationship between general adjustment and role ambiguity is mediated by the relationship between spouse and family support and general adjustment. This was not the hypothesized model though, which expected the regression model to show integrated cross-cultural training, formal mentoring, spouse and family support, and the balance-sheet compensation approach to all exhibit a positive relationship with general adjustment.

The relationship between spouse and family support and general adjustment makes sense for a few reasons. First, this is consistent with the existing research that the spouses' adjustment has a significant impact on adjustment (Black & Stephens, 1989; Stroh et al., 1994; Mohr & Klein, 2004). Second, the relationship seems logical based on the assumption that if the organization is providing support to the spouse or partner for those items, such as adjustment to living conditions, that the expatriate would also be receiving support in those areas as well. Lastly, total time on assignment and favorable living conditions have been shown to significantly relate to the spouses' general adjustment (Black & Gregersen, 1991). This study seemed to have a high average tenure on assignment, which could explain some of the relationship between the two scales.

The impact support for the spouses' adjustment seems to have on expatriates' general adjustment indicates a need for organizations to be concerned with the spouses' adjustment, as spouses are generally more directly involved with the local environment on a daily basis (Shaffer & Harrison, 2001).

Interaction Adjustment

Interaction adjustment is also one of the adjustment sub-scales of adjustment that has shown to be reliable in numerous prior studies in the literature. This study also showed the interaction adjustment sub-scale to exhibit high internal reliability. Actually, this study exhibited a much higher level of reliability than Black and Stephens' (1989) original study, further validating the interaction adjustment sub-scale.

The final multiple regression model for interaction adjustment included four variables, spouse and family support, role ambiguity, language fluency, and compensation approach. Compensation approach however did not contribute significantly to the regression. Apparently, the relationship between interaction adjustment and compensation approach is mediated by the relationships between the other variables in the final model and interaction adjustment. This was not the hypothesized model though, which expected the regression model to show integrated cross-cultural training, mentoring, spouse and family support, and the balance-sheet approach to compensation to all exhibit a positive relationship with interaction adjustment.

Language fluency was a control variable in this study rather than an independent variable. However, language fluency's significance as part of the interaction adjustment regression model is not surprising. Improved ability to communicate with host nationals would logically seem to lead to increased interaction adjustment. As part of pre-departure and post-arrival training, MNCs should consider providing language training to expatriates.

Work Adjustment

Work adjustment is the third of the three sub-scales of adjustment that has shown to be reliable in numerous prior studies in the literature. This study also showed the interaction adjustment sub-scale to exhibit high internal reliability. Actually, this study exhibited a much higher level of reliability than Black and Stephens (1989) original study, further validating the interaction adjustment sub-scale.

The final multiple regression model for work adjustment included all independent variables, spouse and family support, role ambiguity, integrated cross-cultural training, mentoring, and compensation approach. Integrated cross-cultural training and mentoring did not contribute significantly to the final regression model. Apparently, the relationship between work adjustment and both integrated cross-cultural training and mentoring is mediated by the relationships between compensation approach, spouse and family support, and role ambiguity and work adjustment. Compensation approach was not significant at the *a priori* alpha level either, but it did appear to be in the right direction with a $p < .10$. This may not indicate significance at the *a priori* level, but compensation was at least associated with the model in the positive direction. The final regression model was basically the hypothesized model, and it explained over half of the variability in work adjustment as related to the variables in the regression model.

With the variables included in the work adjustment regression model explaining over half the variability in work adjustment, this seems to indicate a “system” of interventions that are beneficial for MNCs to consider. Role ambiguity explained the greatest amount of variability in the model. Spouse and family support and compensation approach also explained a large portion of the variability in the model.

Perceived Performance

The literature has primarily focused on personal factors or organizational factors, but little attention has been paid to the connection between performance interventions undertaken by organizations and actual job performance. Rather than just examining adjustment, this study also examined the impact of various performance interventions on perceived performance as well.

The scale used to measure perceived performance derived from Black and Porter's (1991) original performance scale. Black and Porter's (1991) original work showed this scale to exhibit high internal reliability. This study also showed performance to exhibit high internal reliability, further validating the performance scale.

The final multiple regression model for performance included all independent variables, spouse and family support, role ambiguity, integrated cross-cultural training, mentoring, and compensation approach. The final model also included language fluency. Role ambiguity and language fluency exhibited the strongest relationship with performance. Apparently, the relationship between performance and the other variables was mediated by the relationships with role ambiguity and language fluency. Other than the inclusion of the control variable language fluency, this was the hypothesized model, and it explains nearly 26% of the variability in performance as related to the variables in the regression model.

Performance Interventions

The literature has long suggested that it is important for organizations to facilitate adjustment (Gregersen & Black, 1990) by managing the factors the organization can control (Stroh et al., 1994). This is of particular interest since job, task, and organizational characteristics may play a greater role in satisfaction and commitment than worker characteristics (Naumann, 1993a; Naumann, 1993b). This seemingly indicates that organizations can impact job satisfaction

and commitment by the policies and programs employed. The findings in this research also seem to indicate that the performance interventions employed by the expatriates' organizations seem to positively impact adjustment and performance as well.

Integrated Cross-Cultural Training

Eschbach et al. (2001) developed a concept of integrated cross-cultural training, combining pre-departure and post-arrival training, finding that integrated cross-cultural training reduces the time necessary to perform effectively. Additionally, those receiving integrated cross-cultural training were shown to have significantly increased general adjustment and interaction adjustment as well (Eschbach et al., 2001). This study attempted to take Eschbach et al.'s (2001) concept and examine the level of rigor and integration in relation to adjustment and performance.

The variable for integrated cross-cultural training did not exhibit the hypothesized relationships with the adjustment variables or the performance variable. Integrated cross-cultural training was not part of the regression model for general adjustment or interaction adjustment. While it was a part of the regression models for work adjustment and performance, it did not contribute significantly. It was mediated by the other performance interventions in those regression models. However, language fluency did contribute significantly to both interaction adjustment and performance. This may have some relationship with the training provided, but this requires further investigation.

Another potential explanation for the lack of significance exhibited by integrated cross-cultural training is the long average tenure on assignment in Hong Kong by the participants. Eschbach et al.'s (2001) study examined the role of integrated cross-cultural training within the first year on assignment, capturing adjustment and performance at two months and nine months on assignment. The population in this study had a mean time on assignment in Hong Kong over

eight years. Given the high average tenure on assignment, the effects of any cross-cultural training may be mediated by personal development and experience over time. It is also possible given the high average tenure that many expatriates who were unable to adjust and perform in the first few years of their assignment were not included in the sample.

Integrated cross-cultural training still seems important though. While this study did not show the statistical relationships expected, the concept and practice of integrated cross-cultural training seems to warrant further consideration. Integrated cross-cultural training was part of the final regression models for work adjustment and performance. Even though it did not exhibit a significant contribution to those models, it still interacted with the other variables as part of those regression models. Eschbach et al.'s (2001) study showed integrated cross-cultural training to reduce the time on assignment necessary to adjust and perform, which would seemingly reduce costs and enhance organizational effectiveness. As mentioned, this study did not show that same finding, but the high average tenure of the study participants may explain why.

Mentoring

The findings in the literature review suggest that the provision of a cultural mentor may enhance employees' adjustment and help them perform better (Shim & Paprock, 2002). Yet, there is a scarcity of literature related to expatriate mentoring (Jassawalla et al., 2006). This study attempted to examine mentoring further. However, only 15 of the 88 participants had access to formal mentoring. Due to the low numbers, this variable was converted to a dichotomous yes or no variable. This reduced the depth of understanding possible. Also, the question as stated on the instrument only focused on "official" or "formal" mentoring. Participants may have had other outlets for mentoring that were not provided by the organization.

The variable for mentoring did not exhibit the hypothesized relationships with the adjustment variables or performance variable. Mentoring was not part of the regression model for general adjustment or interaction adjustment. While it was a part of the regression models for work adjustment and performance, mentoring did not contribute significantly. It was however mediated by the other performance interventions in those regression models.

The fact that only 15 of 88 participants worked in organizations that provided formal mentoring is not unique. Jassawalla et al.'s (2006) study only had six of 27 participants having formal mentors. However, 11 others in their study individually sought out informal mentors (Jassawalla et al., 2006). This may have been similar in this study's sample, but the instrument only focused on the provision of "official" mentoring.

Mentoring still seems important though. While this study did not show the statistical relationships expected, the concept and practice of mentoring seems to warrant further consideration. Mentoring was part of the final regression models for work adjustment and performance. Even though it did not exhibit a significant contribution to those models, it still interacted with the other variables as part of those regression models. Though not all of the participants in Jassawalla et al.'s (2006) study had mentors, all of them viewed the concept of mentoring favorably. This seems to indicate an opportunity for further study.

Role Ambiguity

The role ambiguity scale was shown to be reliable in prior studies in the literature. This study also showed the role ambiguity scale to exhibit high internal reliability. Actually, this study exhibited a much higher level of reliability than Rizzo et al.'s (1970) original study, further validating the role ambiguity scale.

Role ambiguity was a part of each of the four regression models. The scale used in the study actually measured role clarity, or the lack of ambiguity. As hypothesized, role ambiguity was a significant part of both the work adjustment and perceived performance regression models. Further, role ambiguity had the greatest impact in both models as well. In regards to work adjustment, this finding further supports the existing literature that shows lesser role ambiguity to relate strongly with work adjustment (Black, 1988; Morley & Flynn, 2003). The strong relationship with work performance, although expected, is a new finding in the literature. Consistent with the findings related to role ambiguity, a strong need seems to exist for organizations to provide clear expectations (Jassawalla et al., 2004).

Role ambiguity was also a significant part of the interaction adjustment regression model as well. This relationship was not hypothesized though. Likewise, role ambiguity was also part of the general adjustment regression model, but it was not a significant predictor. In light of organizational support theory and resource allocation theory, these relationships may make sense. Reduced role ambiguity may enhance the expatriates' view of the level of organizational support needed or received. Prior research has shown that organization support relates positively to both general adjustment and interaction adjustment (Kraimer et al., 2001). Additionally, resource allocation theory suggests that individuals divide their abilities and resources between various tasks (Kanfer, 1990). With reduced role ambiguity, expatriates' mental and emotional resources are freer to focus on factors associated with both general and interaction adjustment.

Reducing role ambiguity seems to be an important aspect of enhancing expatriate adjustment and performance. It is expected that a major work role transition such as an international assignment would have some role ambiguity associated with it (Black, 1988). The basic understanding is that the greater the role ambiguity, the less able the individual is to predict

the outcomes of certain behaviors (Black, 1988), resulting in decreased adjustment and performance. Handy (1985) suggests four frequent instances of role ambiguity: (1) uncertainty about how work is evaluated; (2) uncertainty about advancement opportunities; (3) uncertainty about scope of responsibilities; and (4) uncertainty about others' performance expectations. In addition to Handy's (1985) list, the additional factor resulting from the scale used in this study would be clarity around how much authority the expatriate has.

Spouse and Family Support

The spouse and family support scale was shown to be reliable in prior studies in the literature. This study also showed the spouse and family support scale to exhibit high internal reliability. This study exhibited a high level of reliability, as it did in Black and Stephens' (1989) original study, further validating the spouse and family support scale.

Support for spouses and families seems to be an important intervention for organizations to consider. Spouse and family support was a part of each of the four regression models. Consistent with the hypotheses, it exhibited a significant relationship as part of the general adjustment, interaction adjustment, and work adjustment regression models. This is consistent with the existing research that the spouses' adjustment has a significant impact on adjustment (Black & Stephens, 1989; Stroh et al., 1994; Mohr & Klein, 2004). Further, the spouses' general and interaction adjustment relate positively to the expatriates' intent to stay (Black & Stephens, 1989). The strong relationship between support for spouses' and family's adjustment seems to indicate a need for organizations to directly support them. This is consistent with Harvey's (1998) findings that MNCs need to support spouses during the assignment (Harvey, 1998). Prior research has found expatriates' focus of support needs to be more on assistance for the trailing spouses than on assistance with their own adjustment to the foreign assignment (Harvey, 1998).

Despite the seeming importance, the literature has primarily focused on the spouses' adjustment and its relation to the expatriates' adjustment, but studies examining the relationship between support for spouses and expatriate performance were not identified. This study attempted to more directly examine the relationship between supporting spouses and families and the expatriates' performance. While spouse and family support was part of the perceived performance regression model, it did not have a significant relationship, but its relationship was mediated by the other variables in the performance regression model.

Compensation

Compensation of North American expatriates is not well examined in the literature. Most of the work simply focuses on how MNCs structure compensation packages, but the literature is limited in relation to compensation's impact on adjustment or performance. Only one article relating directly to the impact of compensation on adjustment or performance emerged from the literature, and this study indicated a lack of literature on international compensation (Harvey, 1993).

This study attempted to address the lack of research related to the relationship between expatriate compensation and adjustment and performance. The compensation variable used in this study was a nominal variable that provided descriptions of three general approaches to compensation packages. The structure of the variable on the instrument may account for some of the weakness in the findings. Compensation was not a part of the general adjustment regression model. Compensation was a part of both the interaction adjustment and performance regression models though, but it was not a significant contributor to either of those models. Compensation was mediated by the other variables in the models. Compensation was also a part of the work

adjustment model. However, it was only significant at a higher alpha level, bringing into question its true significance.

The results related to compensation do not provide any greater clarity regarding the relationship between compensation approach and adjustment and performance. The variable used in the study was a nominal variable though. The use of a more detailed scale in future research might yield different findings. Another factor may be the high average tenure of the participants. It is possible that compensation may not be a significant factor related to adjustment or performance after the first few years on assignment. It is also possible that the effects of compensation are seen in other significant variables such as spouse and family support. The findings related to compensation in this study are inconclusive. The examination of the relationship between expatriate compensation and adjustment and performance requires further inquiry.

Theoretical Implications

A limitation of much of the expatriate literature is the lack of a theoretical underpinning. The trend over the past decade has been changing this, due in large part to the seminal work of Black et al. (1991) in the adjustment domain. However, outside of the work directly related to adjustment, there is not a consistent theoretical basis in the literature. The results of this study provide support for the theoretical framework presented in the literature review. Figure 2 in the literature review provides a pictorial view of how the theories practically interact in relationship to adjustment and job performance.

Spillover Theory

Spillover theory suggests that stress and problems in non-work domains of life impact individuals' adjustment to the work environment (Bhagat, 1983). Based on spillover theory,

stress and issues related to adjusting to life in the new foreign culture may “spill over” into the actual work assignment, impacting work adjustment and performance (Takeuchi et al., 2002). Thus, experiences at work can “spill over” to home, and experiences at home can “spill over” to work (Caligiuri et al., 1998).

This study lends further support to spillover theory. Spouse and family support was a significant part of all three adjustment regression models, and it was a part of the performance regression model, even though it was not a significant contributor. This was expected due to prior studies that suggest spousal adjustment to be a major contributor to expatriate work adjustment, by showing that support for spouse and family adjustment leads to greater work adjustment. This supports spillover theory. The suggestion for organizations is that intentional, organizational support for the spouse and family will positively “spillover” into the work environment for the expatriate.

Further, role ambiguity was a part of the general adjustment regression model, and it was a significant contributor in the interaction adjustment regression model. Neither of these findings was hypothesized. However, given spillover theory, these findings seem consistent. If expatriates have greater role clarity at work, the reduction in stress associated with that would “spillover” into the non-work domains of life, allowing for greater adjustment. A prior meta-analysis showed a clear link between three work-related stressors, role clarity, role discretion, and coworker support, and both general and interaction adjustment (Bhaskar-Shrinivas et al., 2005). This study supports the findings of that meta-analysis.

Transaction Cost Theory

Transaction cost theory examines the impact of a system of activities taking place during all stages of a contract (Williamson & Masten, 1999). McNulty and Tharenou (2004) suggest

that the international assignment may be considered a contract between the organization and the expatriate. In transaction cost theory, each contractual activity by either party has the potential to increase or decrease the costs and benefits to the firm over the life of the contract (Tan & Mahoney, 2003). The performance regression model provides limited support for transaction cost theory. All five of the performance intervention variables were part of the final regression model along with language fluency, which may be due to either organizational support or personal learning. However, only role ambiguity and language fluency were significant contributors.

Performance is the direct benefit examined. Yet, for example, activities such as cross-cultural training that help to increase adjustment may in turn lead to increased performance and reduced intentions to return prematurely (Bhaskar-Shrinivas et al., 2005; Harrison et al., 2004). The system of performance interventions exhibited relationships in some capacity in each of the adjustment regression models as well. These efforts to enhance adjustment may result in other benefits beyond performance, such as reduced intentions to return prematurely, which lend support to the transaction cost theory as it relates to expatriates.

Organizational Support Theory

Organizational support theory suggests that the benefits or consequences of perceived organizational support result from the employees' perceptions of the organization's fair and beneficial treatment and from the normal reciprocity that exists within a typical social exchange framework (Rhoades & Eisenberger, 2002) Much of the work on perceived organizational support has promise, but greater work and consistency of findings related to outcomes such as job performance is needed (Harrison et al., 2004).

While this study did not examine perceived organizational support directly, the belief is that the performance interventions provided by the organization are forms of support that lead to greater adjustment and performance. This would make sense in relation to organizational support theory. The findings in this study suggest that greater more accepted performance interventions would positively impact adjustment and performance.

Resource Allocation Theory

Resource allocation theory suggests that individuals make conscious choices as to how to allocate their cognitive, emotional, and physical resources to attend to job related tasks and goals (Kanfer & Ackerman, 1989). This theory helps in understanding how individuals divide abilities and resources between various tasks (Kanfer, 1990). Resource allocation theory may have implications with expatriates as they tend to have individual resource demands for relocation related activities, adjustment to the new culture, and adjustment to the new work assignment. The proposition is that when expatriates are given time to attend to resource-sensitive tasks during transitional times of international relocation they should be better able to perform than those who are not given the same time (Saathoff-Wells, 2000).

The relationship between spouse and family support and work adjustment, as well as spouse and family support being a part of the performance regression model seems to lend support to resource allocation theory. By the organizations directly supporting the spouse and family, the expatriate has greater personal resources available to devote to work related tasks and goals.

Conclusions and Implications

The results of this study have implications for MNCs and human resource development practitioners in considering how to support and enhance their expatriates' adjustment and

performance post-arrival. Two primary areas emerged from the study that seem important for MNCs to consider. The first is the reduction of role ambiguity. There is a high correlation between the clarity of an assignment and the adjustment and performance of expatriates. Key areas for organizations to consider include: (1) clear purpose and goals of the assignment; (2) clear expectations and responsibilities; and (3) clear levels of authority and decision-making capabilities.

The second key area is the importance of supporting the spouse and family. There is a high correlation between the level of support the organization provides to the spouse and the expatriate's adjustment and performance. Areas of support for organizations to consider include: (1) housing and general living conditions; (2) comfortability with the area, including food, shopping, health care, and entertainment; and (3) interaction and socialization with host nationals. Support for spouses and families in these areas seem to free up expatriates' mental and emotional resources to focus on the assignment and performance.

A final implication for MNCs and human resource development practitioners is that post-arrival, on-assignment performance interventions matter. The development plan for expatriates should not just include the pre-departure phase. MNCs should consider a "system" of interventions that span pre-departure and post-arrival. Further, this "system" of interventions should include multiple elements like mentoring and compensation approach as well. While these items may not have had the hypothesized statistical relationships, they were a part of the final regression models, indicating that they did have a mediating affect. A combination of training and facilitation, such as relocation services and cultural integrators and assimilators, may assist adaptation to the new environment (Pires et al., 2006). Beyond adjustment though, this

study indicates that training and facilitation activities by MNCs may also assist performance as well.

Beyond direct praxis, this study contributes to and enhances the current literature through the design of the study, looking at multiple interventions simultaneously. This study also examines both adjustment and performance simultaneously, which seems important if adjustment is an antecedent to performance and not the end goal.

Recommendations for Future Research

The study of expatriate adjustment and performance continues to be important, with a wide range of valuable research opportunities available for examination. Some research continues to examine personality and behavioral characteristics of expatriates. This study examined performance interventions that organizations can influence in practice to assist adjustment and performance. Specifically, this study examined post-arrival, on-assignment performance interventions. While there are numerous other interventions not addressed in this study, the recommendations for future research are focused on the interventions examined in this study as well as on expatriate performance.

Integrated cross-cultural training still seems valuable to consider in future research studies. Eschbach et al. (2001) developed a concept of integrated cross-cultural training, combining pre-departure and post-arrival training, finding that integrated cross-cultural training reduces the time necessary to perform effectively. This study attempted to take Eschbach et al.'s (2001) concept and examine the level of rigor and integration in relation to adjustment and performance. While this study did not show the statistical relationships expected, the concept and practice of integrated cross-cultural training seems to warrant further consideration. Integrated cross-cultural training was part of the final regression models for work adjustment and

performance. This relationship seems to warrant further investigation. A stronger instrument to measure levels of integration and rigor would be helpful in future research.

Like integrated cross-cultural training, mentoring did not show the hypothesized relationships in this study either. However, the instrument utilized in this study focused on formal mentoring provided by the organization. Participants may well have had access to other mentors through informal channels. The expatriate mentoring literature is still under developed, and further research that investigates the different types of mentoring relationships and their impact on adjustment and performance seems warranted.

Spouse and family support was shown to have a strong correlation with adjustment and performance. Future research should build on this. Specifically, future research should consider the impact and benefits of various types of spouse and family support. Areas to investigate might include spouse or partner job placement, educational assistance and placement for children, language training, and interactions with host nationals.

Compensation also warrants further research. Compensation of North American expatriates is not well examined in the literature. Most of the work simply focuses on how MNCs structure compensation packages, but the literature is limited in relation to compensation's impact on adjustment or performance. This study provided an initial attempt at examining the relationship between approach to compensation packages and adjustment and performance. Future research should examine the relationship between adjustment and performance with compensation package elements at a more granular level.

Performance

Much of the current literature focuses on antecedents of performance, which seems to be needed. This study focused on the connection between performance interventions undertaken by

organizations and actual job performance as well. While this study was limited to five specific interventions, future research should examine others, such as socialization tactics and role in decision making.

Only 17% of the respondents in this study had access to formal mentoring programs. This is somewhat surprising given the attention given to mentoring over the past two decades. The research that does exist has focused on the relationship between mentoring and adjustment. Future research should examine the relationship between formal mentoring provided by organizations and performance.

This study examined self-reported or perceived performance. Similar studies with peer and supervisor rated performance would enhance this area of research. Further, longitudinal research related to performance would also be beneficial. This study examined performance at a point in time. Research that examines the impact of performance interventions over time can provide greater precision.

Finally, continued research that examines the relationship between adjustment and performance is needed. There has been limited prior research that examines the relationship between adjustment to the international assignment and job performance (Kraimer & Wayne, 2004; Kraimer et al., 2001; Parker & McEvoy, 1993). Only one study was identified that examined the relationship between adjustment and performance longitudinally (Takeuchi et al., 2005). Recent literature proposes that operational capability may have the dominant role in performance, suggesting that adjustment has little effect (Holopainen & Bjorkman, 2005). This requires further examination, as performance is ultimately the key driver behind much of the literature.

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APPENDIX A: QUESTIONNAIRE

Welcome and Introduction.

Thank you for choosing to participate in this short survey.

Participation in this survey is voluntary. You may exit at any time.

You can obtain further information by contacting the primary researcher, Evan Wood, at ewood3@indstate.edu.

Please answer every question.

This survey consists of 8 short sections. The first section asks basic demographic questions, and each other section asks questions related to your CURRENT job in Hong Kong.

Section1. General questions about you.

1. Geographic location of country of citizenship: Africa, Australia, Caribbean, Central America, East Asia, Eastern Europe, Middle East, North America, South America, South Asia, Western Europe
2. How well do you speak the host-country language? (1=not at all; 5=fluently)
3. Prior to this assignment in Hong Kong, have you had any other expatriate assignment(s)? (Yes or No)
If so, for how many years have you been assigned abroad in total? _____ Years
4. How long have you been assigned to Hong Kong? _____ Years _____ Months

Section 2. From the options below, please indicate which item BEST describes the cross-cultural training provided to you by your organization.

	Time and Duration	Cross-Cultural Training Method/Approach	Rigor and Degree of Integration
a.	Pre-departure Less than a week	Factual/knowledge-based: Briefing on area and cultural: climate, housing, schools type information Polite language phrases taught	Low rigor Not integrated (i.e. each subject delivered independent of each other)
b.	Pre-departure Week to 4 weeks	Emotional/analytical: Home and host cultural awareness; critical incidents, cultural assimilators, stress reduction Language training	Moderate rigor Partially integrated (i.e. starts with factual and moves to emotional)
c.	Pre-departure and on-site Month or more	Experiential/behavioral: Role-playing, simulations, field experiences, sensitivity training Extensive language training	High rigor Integrated (i.e. starts with factual and progresses through experiential)
d.	None	No training or only self-directed training	N/A

Section 3. Use the scale below to indicate how much you believe that each statement accurately describes your current job.

Very False Slightly False Neutral Slightly True True Very True
 1-----2-----3-----4-----5-----6-----7

1. I feel certain about how much authority I have.
2. Clear, planned goals and objectives for my job.
3. I know that I have divided my time properly.
4. I know what my responsibilities are.
5. I know exactly what is expected of me.
6. Explanation is clear of what has to be done.

Section 4. Use the scale below to indicate to what extent your organization directly supported your spouse/partner in adjusting to the items listed for this current assignment.

Very Insufficient	Slightly Insufficient	Slightly Neutral	Slightly Sufficient	More than Sufficient
1-----	2-----	3-----	4-----	5-----
	6-----			7

1. Living conditions in general
2. Housing conditions
3. Food
4. Shopping
5. Cost of living
6. Entertainment/recreation facilities and opportunities
7. Health care facilities
8. Socializing with host nationals
9. Interacting with host nationals on a day-to-day basis

Section 5.

Does your organization provide a mentoring program? (Yes/No)

Use the scale below to indicate how much you agree that each statement describes mentoring available to you by your organization.

Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree
1-----	2-----	3-----	4-----	5-----	6-----	7

1. The formal mentoring program in my organization is effective.
2. The formal mentoring program allows me access to mentors who otherwise would have been unattainable.
3. I am satisfied with the formal mentoring program.
4. The formal mentoring program smoothed the way for me to get a mentor.
5. I would be unable to get a mentor if not for the formal mentoring program.
6. The formal mentoring program is a waste of time. (R)

Note (not on actual survey): (R) indicates reverse scored items

Section 6. From the options below, please indicate which item BEST describes the approach taken by your organization in developing your compensation package.

- a. My organization uses a “no gain-no loss” method of compensating me for working overseas. The idea is that I can sustain my standard of living throughout the assignment for me and/or my family, meaning we did not come out ahead or behind (financially) from the assignment. In general, the goal is to provide equivalent purchasing power abroad to help maintain my home lifestyle.
- b. My organization uses a “when in Rome do as the Romans do” method that takes into account what competitors are paying and/or how expatriate compensation compares with the compensation levels of local employees in comparable jobs. Allowances (e.g. housing, children’s education, and incentive premiums in particular) are sharply curtailed.
- c. My organization uses an “international headquarters” approach that compensates all expatriates in equivalent positions as if we all originated from the same geographic headquarters and are being compensated on essentially the same program.

Section 7. Using the scale below, please indicate how unadjusted or adjusted you are to the following items. Adjustment refers to how comfortable you feel in the sense that you feel you know what needs to be done in order to successfully carry-out each of the following items.

Not Adjusted	Fairly	Slightly	Neutral	Slightly	Very Well
At All	Unadjusted	Unadjusted	Neutral	Adjusted	Adjusted
1-----	2-----	3-----	4-----	5-----	6-----7

1. Living conditions in general
2. Housing conditions
3. Food
4. Shopping
5. Cost of living
6. Entertainment/recreation facilities and opportunities
7. Health care facilities
8. Socializing with host nationals
9. Interacting with host nationals on a day-to-day basis
10. Interacting with host nationals outside of work
11. Speaking with host nationals
12. Specific job responsibilities
13. Performance standards and expectations
14. Supervisory responsibilities

Section 8. Recall your most recent actual performance evaluation in your current assignment and indicate where that rating would place you relative to your peers on a percentage basis along the following five dimensions: (e.g. an 80% would indicate that 80% of peers perform below you and 20% perform above you). If you have not had a performance evaluation in your current assignment, estimate where your rating will place you relative to your peers.

1. Overall performance _____%
2. Ability to get along with others _____%
3. Completing tasks on time _____%
4. Quality (as opposed to quantity of performance) _____%
5. Achievement of work goals _____%

Debrief.

You participated in a study that was designed to investigate the relationship between various post-arrival performance interventions for expatriates and expatriates' adjustment and performance. The results from this study will produce information that may be used to design and implement more successful expatriate support systems.

As researchers, we cannot do our work without your help, so please know that your participation is valued and greatly appreciated! If you would like to discuss your experience as an expatriate, or if you would like to learn more about the study's purpose and findings, please contact Evan Wood at ewood3@indstate.edu.

APPENDIX B: INFORMED CONSENT STATEMENT

You have been asked to participate in a research study conducted by Evan Wood, a doctoral student in the School of Technology at Indiana State University. This study is supervised by Dr. Bassou El Mansour. This research involves the study of performance interventions employed by organizations to assist North American expatriates working and living in Hong Kong, and it is part of Evan Wood's doctoral dissertation. You are being asked to participate in this study because of your relationship with {organization's name}.

The study involves the completion of a web-based survey to be taken at your convenience. This survey will take approximately 10 minutes.

The information you provide will be kept strictly confidential. The informed consent forms and other identifying information will be kept separate from the data. All materials will be stored on a password protected drive owned by Evan Wood. Any records that would identify you as a participant in this study, such as informed consent forms, will be destroyed by Evan Wood immediately after the survey is closed and the remaining data is secured.

The results of this research will be published in Evan Wood's dissertation and possibly in subsequent journals or books.

You may develop greater personal awareness of your adjustment to your current assignment and your job performance as a result of your participation in this research. The risks to you are considered minimal; there is no likelihood that you may experience some emotional discomfort during or after your participation.

You may withdraw from this study at any time, either during or after your participation, without negative consequences. Should you withdraw, your data will be eliminated from the study and will be destroyed.

No compensation will be provided for participation. However, if you wish to participate, those completing the survey and voluntarily providing their e-mail address will be entered into a drawing to win an evening for two at Isola in Central Hong Kong. Immediately upon completing the drawing, all participating e-mail addresses will also be destroyed by Evan Wood.

You may request a copy of the summary of the final results by e-mailing your request to Evan Wood at ewood3@indstate.edu.

If you have any questions about any aspect of this study or your involvement, please contact Evan Wood at ewood3@indstate.edu prior to providing your consent. You may also contact the

supervising faculty if you have questions or concerns about your participation in this study. The supervising faculty has provided contact information at the bottom of this form.

If you consent to participate, please click Next to continue to the survey, signifying your consent and agreement to participate.

If you wish to opt out of receiving further communication regarding this particular survey, please e-mail Evan Wood at ewood3@indstate.edu and you will be removed from the e-mail list.

Researcher Contact: Evan Wood; 7904 Pebble Creek Pl, Fort Wayne, IN 46835;
ewood3@indstate.edu

Faculty Contact: Dr. Bassou El Mansour; Indiana State University, College of Technology, 101 North St., Terre Haute, IN 47809; bassou.elmansour@indstate.edu

APPENDIX C: E-MAIL PRE-CONTACT LETTER

Subject: Expatriate Research Survey from Indiana State University

[First Name] [Last Name],

In one week, you will be receiving an invitation to participate in a survey of North Americans who live and work in Hong Kong.

This survey is being conducted as part of Evan Wood's doctoral dissertation research through Indiana State University. The purpose of this study is to better determine how various post-arrival performance interventions employed by organizations can assist expatriates in their adjustment to the assignment and their on-the-job performance.

This is a brief web-based survey that should take no more than 10 minutes.

As an incentive to participate, one respondent will be randomly selected to receive a \$1,000HK gift certificate to Isola in Central Hong Kong.

Participation in this brief, yet important, survey is strictly voluntary. Please consider participating when you receive the invitation.

Best Regards,

Evan Wood
Doctoral Candidate
Indiana State University (USA)
ewood3@indstate.edu

APPENDIX D: INITIAL SURVEY E-MAIL COVER LETTER

Subject: Expatriate Research Survey from Indiana State University

[First Name] [Last Name],

You are invited to participate in a survey of North Americans who live and work in Hong Kong.

This survey is being conducted as part of Evan Wood's doctoral dissertation research through Indiana State University. The purpose of this study is to better determine how various post-arrival performance interventions employed by organizations can assist expatriates in their adjustment to the assignment and their on-the-job performance.

This is a brief web-based survey that should take no more than 10 minutes. Follow this link to the survey: [Survey link].

As an incentive to participate, one respondent will be randomly selected to receive a \$1,000HK gift certificate to Isola in Central Hong Kong.

This survey is a simple questionnaire. There are no known risks for participation. There is no cost to you other than time, and there is no compensation, other than the random drawing that will be conducted. The benefit is that the findings of this study will be published in Evan Wood's dissertation and potentially in other journals or books. These findings will hopefully provide insight to organizations on how to better support their expatriates abroad.

To ensure your privacy and to assist you in making honest and accurate responses, this survey may be completed without providing any identifying information. The only identifying information will be your e-mail address if you wish to participate in the drawing, but that data will be captured in a manner that keeps it unassociated with your answers and will be immediately destroyed after completion of the drawing. Your e-mail address will not be retained long-term or shared with anyone. No other identifying information will be requested.

Participation in this brief, yet important, survey is strictly voluntary.

Follow this link to the survey:
[Survey link]

Or copy and paste the URL below into your browser:
[Survey URL]

Best Regards,

Evan Wood
Doctoral Candidate
Indiana State University (USA)
ewood3@indstate.edu

Please note: If you do not wish to receive further e-mails, please click the link below, and you will be automatically removed from this mailing list.

[Remove link]

APPENDIX E: SURVEY FOLLOW-UP E-MAIL LETTER

Subject: Follow-Up: Expatriate Research Survey from Indiana State University

[First Name] [Last Name],

Last week, you were invited to participate in a survey of North Americans who live and work in Hong Kong. You still have an opportunity to participate if you are willing.

This survey is being conducted as part of Evan Wood's doctoral dissertation research through Indiana State University. The purpose of this study is to better determine how various post-arrival performance interventions employed by organizations can assist expatriates in their adjustment to the assignment and their on-the-job performance.

This is a brief web-based survey that should take no more than 10 minutes.

If for some reason, you have already participated in this survey and you are still getting this e-mail, thank you again for participating in the survey!

As an incentive to participate, one respondent will be randomly selected to receive a \$1,000HK gift certificate to Isola in Central Hong Kong.

This survey is a simple questionnaire. There are no known risks for participation. There is no cost to you other than time, and there is no compensation, other than the random drawing that will be conducted. The benefit is that the findings of this study will be published in Evan Wood's dissertation and potentially in other journals or books. These findings will hopefully provide insight to organizations on how to better support their expatriates abroad.

To ensure your privacy and to assist you in making honest and accurate responses, this survey may be completed without providing any identifying information. The only identifying information will be your e-mail address if you wish to participate in the drawing, but that data will be captured in a manner that keeps it unassociated with your answers and will be immediately destroyed after completion of the drawing. Your e-mail address will not be retained long-term or shared with anyone. No other identifying information will be requested.

Participation in this brief, yet important, survey is strictly voluntary.

Follow this link to the survey:
[Survey link]

Or copy and paste the URL below into your browser:
[Survey URL]

Best Regards,

Evan Wood
Doctoral Candidate
Indiana State University (USA)
ewood3@indstate.edu

Please note: If you do not wish to receive further e-mails, please click the link below, and you will be automatically removed from this mailing list.

[Remove link]

