Testing a Theoretical Model for Examining the Relationship Between Family Adjustment and Expatriates’ Work Adjustment

Paula M. Caligiuri, MaryAnne M. Hyland, and Aparna Joshi
Rutgers—The State University of New Jersey

Based on theoretical perspectives from the work/family literature, this study tested a model for examining expatriate families' adjustment while on global assignments as an antecedent to expatriates' adjustment to working in a host country. Data were collected from 110 families that had been relocated for global assignments. Longitudinal data, assessing family characteristics before the assignment and cross-cultural adjustment approximately 6 months into the assignment, were coded. This study found that family characteristics (family support, family communication, family adaptability) were related to expatriates' adjustment to working in the host country. As hypothesized, the families' cross-cultural adjustment mediated the effect of family characteristics on expatriates' host-country work adjustment.

Increased global competition has given rise to human resource systems that foster and successfully use individuals' global competence (Adler & Bartholomew, 1992). Having an employee development system in which high-level potential managers are required to accept a global assignment to gain global experience is one method for building global competence within organizations. Because global assignments are important for both individuals' career growth and organizations' global success, having a systematic means to predict who will be most likely to succeed in these critical assignments is also increasing in importance.

The need for multinational organizations to improve their ability to predict success on global assignments is compounded by the fact that many global assignments are not successful (Black, Gregersen, & Mendenhall, 1992; Tung, 1981). Given the strategic importance multinational companies (MNCs) place on global assignments (e.g., high-level negotiations, foreign subsidiary management, new market development), the harm an unsuccessful expatriate may cause in the host country can be detrimental to an MNC's future global business (Gregersen & Black, 1990; Zeira & Banai, 1985). As Zeira and Banai (1985, p. 34) suggested, the real cost of failure of international executives extends beyond the monetary expense of moving personnel: Failure "almost invariably has a negative impact on future interactions between the MNCs and the host countries." For this reason, international human resource practitioners and management researchers alike are particularly interested in understanding how best to predict individuals who can live and work well in cross-national settings. To this end, many have been examining the topic of cross-cultural adjustment (i.e., the extent to which expatriates feel comfortable and adapted to living in their host country). It is important to study cross-cultural adjustment because "poor cross-cultural adjustment" is a common reason expatriates give for prematurely terminating their global assignments (Tung, 1981). The premature termination of a global assignment is especially problematic given the high cost of relocating employees overseas.

For those expatriates who do return from their assignments prematurely, studies have found that spouses' inability and the expatriates' inability to adjust to living in the host country were the two most frequently cited reasons for the failure (Handler, 1995; Harvey, 1985; Tung, 1981). Therefore, an expatriate spouse's adjustment is one of the most critical determinants of whether an expatriate completes his or her assignment.
1991b; Tung, 1981) and how successful the expatriate’s performance will be while on the assignment (Black & Gregersen, 1991b; Black & Stephens, 1989). In a study of Japanese expatriates, Fukuda and Chu (1994) found that family-related problems were ranked first in explaining why expatriates terminated their assignments.

It is not surprising that the family has such a pronounced influence on the outcome of the assignment given that global assignments, by their very nature, affect the family as a whole and not just the employee on the assignment (Guzzo, Noonan, & Elron, 1994). Past research suggests that geographic relocations cause a tremendous disruption in the lives of all family members (Guzzo et al., 1994; Munton, 1990; Noe & Barbar, 1993). To date, the effect of family adjustment on the expatriates’ success has focused primarily on the expatriates’ cross-cultural adjustment and the spouses’ cross-cultural adjustment as predictors of premature return from assignment (Black & Gregersen, 1991a; Black & Stephens, 1989; Fukuda & Chu, 1994; Schneider & Asakawa, 1995). There is little existing research on the role of the family as a whole (including children) as a predictor of the outcome of expatriate assignments. In addition, little is known of the process by which a family affects an expatriate’s work in the global assignment. That is, what characteristics of the family will assist (or hinder) the expatriate’s ability to work in the host country? The purpose of this study was to (a) propose a conceptual model for assessing the influence of an expatriate’s family on the expatriate’s adjustment to working in the host country, (b) investigate the relationship between family characteristics and expatriates’ adjustment to working in the host country, and (c) test the mediating effect of the family’s cross-cultural adjustment on the relationship between family characteristics and expatriates’ work adjustment.

Work/Family Theories

Using theories developed in the work/family literature, this article proposes a model for examining the underlying relationship between the expatriates’ family adjustment and the way in which family adjustment would affect expatriates’ performance. Three theoretical perspectives developed from the work/family literature will be included in our model: (a) family systems theory (e.g., Hill, 1949; M. A. McCubbin, 1988; Minuchin, 1974); (b) double ABCX theory (Hill, 1949; H. L. McCubbin & Patterson, 1982, 1983); and (c) spillover theory (e.g., Aldous, 1969; Crouter, 1984; Piotrkowski, 1979). The first two, family systems theory and double ABCX theory, can be used to explain the process by which families become (or fail to become) cross-culturally adjusted while they are on their global assignments. The latter, spillover theory, can be used to explain how the family’s affects while living in the host country influences the expatriate’s ability to work in the host country. Spillover theory, family systems theory, and double ABCX theory, which are explained in greater detail in the next section, provide a theoretical perspective for studying cross-cultural adjustment of families on overseas assignments and how family adjustment may influence the expatriates’ performance.

Family Systems Theory

Family systems theory (Minuchin, 1974) proposes that families are cultural systems that go through developmental stages, trying to maintain a sense of continuity and equilibrium and enhance each member’s growth. According to Minuchin (1974),

A schema based on viewing the family as a system, operating within specific social contexts, has three components. First, the structure of the family is that of an open sociocultural system in transformation. Second, the family undergoes development, moving through a number of stages that require restructuring. Third, the family adapts to changed circumstances so as to maintain continuity and enhance the psychosocial growth of each member. (p. 51)

From this open-system approach, the demands of the foreign environment are part of the extrafamilial demands to which the family must transform or adapt. Healthy adaptation to the foreign environment would reestablish family functioning overseas in a way that would facilitate psychosocial growth for each family member. Because of the way the family members are interrelated through alliances and coalitions, according to this theory, any one individual family member on a global assignment could potentially affect the psychological state of any other family member, disrupting the balance between family members’ relationships. The actions of an individual within the family affect and are affected by the actions of the other primary members of the family system.

A family system suggests that there is an equilibrium between the family members and that each individual family member can affect the psychological state of other family members (Brett & Stroh, 1995). Family systems theory and the related concept of family equilibrium suggest that pressures both outside the family and within the family can disturb the equilibrium of the family (Brett & Stroh, 1995). In the context of global assignments, pressures within the family, such as a child’s maladjustment to his new school, or outside the family, such as unsatisfactory living conditions or difficulty in getting certain foods, can affect individual family members and thus the equilibrium of the family. Individual family members’ cross-cultural adjustment, therefore, will directly affect the family’s adjustment as a whole. Thus family systems theory allows us to consider the family as a unit, with
family-unit-level skills, abilities, and characteristics. The proposed model will focus on the family-level system as an antecedent to the expatriate's ability to work in the host country.

**Double ABCX Theory**

In the context of the family system, a theory that examines family dynamics as they relate to family adaptation to stressors such as a global relocation is the double ABCX model (Hill, 1949; H. L. McCubbin & Patterson, 1982, 1983). This model suggests that three factors (A, B, and C, respectively) interact to produce a family's adaptation or adjustment: (A) the stressor, (B) the family's resources or characteristics to cope with the stressor, and (C) the family's perceptions of the stressor. In the case of global assignments, the stressor is the international relocation (see Figure 1). Wiggins-Frame and Shehan (1994) suggested that the negative effects of the stressor can be exacerbated by “pile-up demands.” These pile-up demands are the life stressors and strains that affect the family “prior to and following a crisis-producing event” (Wiggins-Frame & Shehan, 1994, p. 196). Stressors may include setting up a new home, making new friends, succeeding at the new job, and so forth (Wiggins-Frame & Shehan, 1994).

According to the double ABCX model, it is not the stressor itself but rather the other two factors that will influence the family's adjustment or adaptation. The two other factors are the resources available to cope with the stress of the relocation and the perceptions of the relocation (i.e., the stressor). These two factors will vary depending on the characteristics of the family as a whole unit (e.g., their communication skills, support of each other, ability to adapt to stressful situations; Felstehausen, 1990; Wiggins-Frame & Shehan, 1994).

Olson, Russell, and Sprenkle (1984) conducted an extensive review of concepts defining family functioning. Through a process of “conceptual clustering of over fifty concepts developed to describe marital and family dynamics” they identified three predominant family characteristics as indicators of family functioning (Olson, Russell, & Sprenkle, 1984, p. 60). These three family characteristics are family support (or cohesion), family adaptability, and family communication. In Figure 1, these three are represented on the left hand side of the model under the heading Family Characteristics.

**Family support.** According to Olson et al. (1984), family support refers to the cohesion or closeness that family members feel toward one another. The behavioral result of this family cohesion is the amount of emotional

![Figure 1. Theoretical model of family adjustment and employment adjustment.](image-url)
support family members give to one another. Several variables indicate the level of supportive, emotional connectedness that family members feel toward one another (e.g., the time spent with family members, shared hobbies, and recreational activities). With a healthy level of family support, the family members have the ability to form healthy autonomous bonds with others outside of the family system while still feeling as though they are an integrated part of the family system (Minuchin, 1974). Either too much or too little support is unhealthy for family functioning. When the family is not supportive, they tend to ignore each other's needs. This can be dysfunctional, especially during stressful periods. When the family is "too" supportive, it is supportive to the point of being stifling, and the family members tend to be overly influenced by each member's problems and concerns. This too can cause greater stress and reduced autonomy of the family members.

Family adaptability. According to Olson et al. (1984), the adaptability of the family will be indicated by the effectiveness of change in its rules of functioning as a result of the external stressor. Families need to adapt to the developmental changes of the family members (e.g., a child starting school) and the extrafamilial pressures that influence the family (e.g., a parent needing to work overtime). A family that is functioning well is able to accommodate the changes while maintaining the family system continuity (Minuchin, 1974). A family that is not functioning well will rigidly try to maintain the status quo despite the fact that its environment is demanding change.

Family communication. According to Olson et al. (1984), "communication" is the third factor that emerges as a predominant theme in the literature on family systems. Effective communication is the characteristic that enables the evolution of the other two attributes of family functioning (support and adaptability). Family communication refers to the ability to exchange opinions, respect differing opinions, establish decision-making rules, resolve conflicts, and so on. A healthy level of family communication will result in both effective support as well as adaptability.

Perceptions of the stressor. Although 75% of relocated employees rated the relocation as stressful (Munton, 1990), the family's perceptions of the relocation can greatly influence how stressful (in terms of physical and psychological impact) the actual relocation becomes. In other words, the global relocation can be viewed either positively or negatively. Positive attitudes toward the global assignment can help the families spend less energy on their anxieties and more energy on positive coping behaviors that would lead to better adjustment (Feldman & Tompson, 1993; Wiggins-Frame & Shehan, 1994). For example, a family with positive family characteristics may eventually become maladjusted to living overseas because its members were unhappy about being relocated in the first place. On the other hand, a family with average family characteristics may "rise to the challenge" of living overseas if its members were positively motivated for the global relocation.

From the family systems' perspective, perceptions of the move is an aggregated family phenomenon. Although aggregated at the family level, individual family members influence the impressions of the family as a whole, that is, negative individuals influence the family negatively, whereas positive individuals influence the family more positively. An early study found that parents' negative attitudes about relocation in military families had a negative effect on their children. That is, children of negative parents tended to demonstrate more psychosocial disturbances than children from positive parents (Pedersen & Sullivan, 1964). At the family-level, Figure 1 shows how family perceptions will moderate the relationship between the family's characteristics and the family's level of adjustment.

The perceptions of the move, in the case of a global assignment, may be especially important in the light of some current research. In a study of urban-rural relocations, individuals were more willing to relocate to areas similar to those in which they were currently residing (Noe & Barba, 1993). In addition, the distance moved has been found to be positively related to overall stress (Munton, 1990). Given these two findings, the perceptions of moving to a foreign country are likely to be more negative because of the greater distance and dissimilarity from home.

**Spillover Theory**

Spillover theory suggests that a working spouse's experiences will carry over into the home; likewise, home experiences can influence a person's work life (Aldous, 1969; Crouter, 1984; Piotrkowski, 1979). It states that the relationship between affective responses in one's work life and family life is reciprocal (i.e., affective responses carry over from one domain, e.g., home life, to the other, e.g., work life; Aldous, 1969; Barnett & Marshall, 1992; Crouter, 1984; Leiter & Durup, 1996; Piotrkowski, 1979). Spillover occurs when workers carry their positive or negative emotions and attitudes from their work life into their home life (Kelly & Voydanoff, 1985; Piotrkowski, 1979) and when they carry over emotions and attitudes from their home back to the work environment (Belsky, Perry-Jenkins, & Crouter, 1985; Crouter, 1984). Studies examining the influence of work on family assume the centrality of work in setting the conditions of family life (Kanter, 1977); however, spillover theory suggests that family also can have an effect on a worker's performance while on the job (see the right side of Figure 1). In the context of
According to ABCX theory, the effects of spillover from home to work can enhance or negatively influence an expatriate's performance because the originating emotions can be positive or negative (Barnett, Marshall, & Sayer, 1992; Lambert, 1990).

A global assignment, unlike a domestic position, blurs the lines between the home and work because of the involvement of the entire family (Harvey, 1985). All family members are displaced as a result of the global work assignment. The spouse's career may be disrupted (Black & Stephens, 1989); and her or his sense of self-worth and identity may suffer (Harvey, 1985). The children's education also may be interrupted (Fukuda & Chu, 1994), and children may lose friends and ties to the community, which may adversely affect their feelings of security and well-being (Harvey, 1985). In the context of global assignments, family life becomes more important because the whole family is uprooted for the sake of one parent's job. New family stresses arise because of the assignment, and the family may encounter a culture very different from their own. It is actually the nonworking family members who have more cross-cultural adjustment than the expatriate employee him- or herself. Home life, in other words, is severely influenced by being on the global assignment. Unlike home, the work environment in the global assignment is often quite similar to the work environment in the domestic position. The expatriate has the comfort of the familiarity of his or her company's culture, whereas the other family members experience completely new surroundings in their day-to-day life. Expatriates also have a social network with host country nationals, whereas spouses are more isolated and may experience more difficulty establishing a social network (Harvey, 1985; Pellico & Stroh, 1997). For these reasons we believe the study of home to work in a global context is justified. As Figure 1 suggests, our model is proposing that family adjustment is a mediator of the relationship between family characteristics and expatriates' adjustment to working in the host country.

The Proposed Model to be Tested

As illustrated in Figure 1, using family systems theory, we propose that the family characteristics (e.g., support, communication, and adaptability) will influence the family's cross-cultural adjustment. That is, families possess certain characteristics that make them more or less likely to adjust while overseas. Thus we propose our first hypothesis:

**Hypothesis 1:** Family characteristics, (support, adaptability, and communication) are positively related to family adjustment to the overseas assignment.

According to ABCX theory, these family characteristics will be moderated by the family's perception of the global relocation. Families who possess a positive perception of moving internationally should adjust better to living internationally, compared with those families with a negative perception of the move, and vice versa. Given that this model is based on a family's adaptation to the perceived stressor, the perception of the move will interact with the family's characteristics. That is, families who perceive the move as positive require fewer family coping characteristics, when compared with those who view the move as negative, in order to adjust to living in the host country. This section of the model on moderated family characteristics (Figure 1) is the antecedent (or predictor) of the dependent variable, the expatriates' adjustment to working in the host country, which suggests our second hypothesis:

**Hypothesis 2:** The relationship between family characteristics and family adjustment will be moderated by the family's perceptions regarding the global assignment.

Once overseas, the family's adjustment will alter the home environment for the expatriate, either positively or negatively. That is, a well-adjusted family will produce a happier, more supportive home environment, and a maladjusted family will produce a negative, anxiety-producing home environment. The right side of Figure 1 suggests that there will be spillover between the home environment and the work environment for expatriates, and that spillover will ultimately affect how well they adjust to working in the host country. A well-adjusted family may lead to positive spillover for the expatriate from home to work, which would, in turn, enhance adjustment to working in the host country. The subsequent family adjustment is the mediator variable in this model.

**Hypothesis 3:** Overall family adjustment will mediate the relationship between family characteristics and employment adjustment.

Based on the theories previously discussed, Figure 1 illustrates a single mediated model linking family characteristics to the dependent variable, expatriates' adjustment to working in the host country.

**Method**

This study tested this model with archival data. The database, data coding procedures, and tools for data coding are described in the following sections.

**Archival Database**

Archival data from a human service consulting firm specializing in global relocation were collected for this study. The client base for this organization is multinational companies. The unit of analysis is employees who work for these multinational organizations.
**Predeparture Data**

One service offered to these clients is a predeparture assessment (PDA) of their expatriate candidates and families, which is conducted with expatriates and their families prior to the decision to participate in a global assignment. It consists of a clinical interview conducted by a trained professional counselor who assesses the expatriate candidate, spouse, and children. Specifically, the clinician will first meet with the family as a whole unit and then with each “family subsystem” (e.g., the couple alone, children alone). This method of clinical assessment is consistent with the family systems’ theoretical perspective.

The counselor’s role in the PDA is to assess the family’s ability and readiness to go on the assignment (i.e., the family’s characteristics and the family’s perceptions of the move). Counselors maintain detailed handwritten notes of the PDA interview in a booklet containing the structured assessment (described later) of specific topics. The topics to be included in the PDA were chosen for their importance regarding the assessment of a family prior to a global assignment and are consistent with the family systems’ theoretical perspective. There are seven topics covered in the PDA. The three topics from the family system’s theoretical perspective are family communication, family adaptability, and family support. The three characteristics chosen for their importance in global assignments are family functioning, conflict resolution, and family perceptions of the move. An overall assessment of the strengths and concerns of the family was also included on the PDA.

For each of the topics covered in the PDA, the counselors have both specific questions to ask the family and a specific methodology for recording notes. In fact, all counselors working for this organization are trained in the same highly specialized format for PDA assessment and note recording. All counselors use a standard booklet provided by the organization, for keeping their PDA assessment notes. As a part of their training, reliability across counselors is enhanced by practice, rehearsal, and evaluation of their performance against a standard protocol. Counselors are allowed to conduct PDA assessments only after they have successfully completed the training. On an ongoing basis, this process is reviewed for consistency in methodology across counselors. The utmost importance for this organization is ensuring reliability across counselors. The handwritten notes taken by the counselors during the PDA process were coded for the purpose of this study.

The PDA process lasts between 3.5 and 10.0 hr. This range, although large, is a function of two factors. One is the size of the family and the number of subsystems within it. For example, a couple without children would take substantially less time in the PDA assessment than a family of five with three adolescent children. The second factor is the amount of time the family gives to discussing this assignment before the PDA assessment. A family whose members have identified and discussed their concerns regarding a global assignment before their PDA assessment will take much less time than a family that uses the PDA assessment as its first opportunity to articulate and discuss its members’ concerns.

The purpose of the PDA assessment is to identify strengths and concerns for the family regarding a global assignment. This is not a therapeutic session. Before the PDA session begins, all employees are told of the specific purposes of the PDA. First, the PDA is for the family, to assist them in self-selecting around whether to accept a global assignment and to review their family situation and the associated risks for them in a global assignment. Second, the PDA is for client organizations. The client organizations are provided with very general recommendations regarding a family’s suitability for a global assignment. In the case of these data, very few (about 1%) of the cases were given a “not recommended” evaluation. Therefore, almost all families were given evaluations of either “recommended” or “recommended with accommodations.”

To ensure another layer of confidentiality, the counseling firm works directly with a corporate contact (usually in Human Resources) who will guard the confidentiality of the limited information they receive on the families who have been through the PDA process. In addition to a recommendation, the corporate contact will receive any “recommended accommodations” the family may need, as judged by the counselor. Additional information is not given that would be deemed private and “unnecessary for providing an accommodation” by the counselor and the family. For instance, an assessor may recommend that a spouse be given a trip home once per month for medical treatment. The medical treatment may be related to a sports injury or a mental disorder; in either case, the recommendation would be the same, and the company does not need to know the purpose.

We recognize that this is not a foolproof system and that an employee (who wants to go on a global assignment) could admonish his or her family members to withhold their concerns during the PDA assessment. However, the counselors are professional clinicians who are familiar with “stowelling” techniques. The counselors’ expertise in family counseling enables them to instill the appropriate confidence in their clients for the PDA process and draw out from them the relevant issues. Therefore, we have confidence that the assessors’ notes reflect a very accurate depiction of the families’ concerns.

Certainly, given that the PDA process assists the family in making a decision regarding a global assignment, some families choose not to go. In the case of the current study, archival data were collected for only those families who had been assessed in the PDA process and accepted their global assignment. If anything, given that the extreme cases are removed, this should somewhat restrict the variance in this study to those who are more likely to succeed globally. That is, those who deselected and those who were not recommended are not included in this study. The restriction of range lowers the likelihood of finding support for these hypotheses; therefore, the analyses (presented later) reflect a more conservative test of the hypotheses in this study.

**Cross-Cultural Adjustment Data**

In addition to conducting PDA assessments prior to departure, the participating global relocation organization also contacts the expatriate families after they have begun their global assignments. Between 6 and 9 months after a family begins a global assignment (M = 7.6 months, SD = 3.3), a case manager (not
connected with the PDA assessment) conducts a telephone interview to gather information regarding a family’s adjustment to living in its host country. As with the PDA, a series of specific questions are outlined for the case manager to ask the various members of the family. The structured interview questions were designed to assess the following topics: how well the family developed friendships, how well the family had established external supports, the family’s cross-cultural adjustment, and the expatriate’s perceived work adjustment. These questions are used to guide the case manager through the telephone follow-up interview.

The case manager speaks independently with both the expatriate and the spouse (and children, when possible). The phone interview lasts an average of 19 min (SD = 12.4) with the expatriates and 23 min (SD = 15.1) with the spouses. (Time records were not kept for the conversations with children. Post hoc questioning of the case managers suggests that the conversations with children tend to be brief, long enough to get a general sense for how they are adjusting.) Detailed handwritten notes are made from the follow-up interview regarding the family’s cross-cultural adjustment. These notes are recorded on a standardized form. Notes are not kept for individual members of the family, except on the question of work adjustment, which is asked solely to the expatriate employee.

Before the case manager begins the follow-up phone interview, he or she will explain the purpose of the call. The follow-up interview is conducted solely for the human services organization’s purposes. Specifically, the follow-up interview is conducted to see how beneficial the PDA process was relative to the families’ cross-cultural adjustment and to see whether there are any resources the families may need that the consulting firm could offer. In addition, the families are told that the purpose of the call is as an ongoing continuous improvement process for their consulting.

Data Coding Procedure

To test the model empirically, quantification of the qualitative archival data was necessary, for which we created two code sheets. The first code sheet quantified the counselor’s notes written in the PDA booklet; the second quantified the notes taken by the case manager who conducted the follow-up phone interview. (The dimensions coded using these two sheets are described in detail in the Measures section and presented in Appendixes A and B.)

Ten sample sets of both PDAs and follow-up interview notes were “practice coded” by the researchers who would eventually collect the data. To ensure that the qualitative notes were being quantified as accurately as possible, the code sheets used to quantify the data went through five iterations of changes during these practice coding sessions. In the first two iterations, the most appropriate scale anchors were selected: For the first iteration, we used simple scale anchors (e.g., high to low) and attempted to code one set of PDA and follow-up notes. We found that the scale anchors were not descriptive enough (approximately 45% agreement); therefore, in the second iteration we changed the type of anchors to those presented in Appendixes A and B. We coded another two sets of notes and found more agreement with the revised anchors (55% agreement).

In the next two iterations, we coded an additional seven sets of notes. After three sets, we stopped, checked our agreement, and noted some “decision rules.” The decision rules are based on phrases that assessors and case managers used multiple times. We did this because we could not create a decision rule for every possible family situation, and this assisted us in deciding what number to give these common phrases when we saw them. (For examples of these phrases, see Appendixes A and B.) We repeated the process for the remaining four sets. Again, after four sets, we stopped, checked our agreement, and added additional phrases to our code sheets. After each iteration our agreement improved (going from 55% to 75% agreement). The last iteration was with assessors and case managers from the participating consulting organization. They read the code sheets and made some minor changes (e.g., some additional phrases). To safeguard against low reliability, and to take into account the fact that there are many unique situations described in the notes, we decided to have consensus meetings. The process we adopted was that each coder would rate 10 cases independently and then discuss his or her ratings in a consensus meeting.

The data used in this study were collected over the course of 4 days by two pairs of coders (one pair for the PDA, one pair for the follow-up interview). The coders for the PDA notes were two of the authors. The coders for the follow-up interview notes were one of the authors and one member of the participating organization. Working independently, coders rated the notes from the PDAs and the follow-up interviews. Given that the coded data points on both the predictor (PDAs) and criterion (follow-up interview) would eventually be used to create composite scores, we examined the interrater reliability for the composite scores. Given that the coded data points on both the predictor and criterion side would be used to create composite scores, it seemed more appropriate to examine the interrater reliability for the composite scores, rather than individual data points. Interrater reliability for both the family characteristics variable and the family adjustment variable had an acceptable level of interrater reliability. The interrater reliability for the family characteristics variable (PDAs) was $r = .79$ ($p < .001$). The interrater reliability for the pair coding the family adjustment variable (follow-up interviews) was $r = .76$ ($p < .001$).

As mentioned previously, in order to improve agreement, the coder pairs conducted a consensus meeting to discuss situations in which they did not agree. Therefore, the interrater agreement after the consensus meeting was perfect. Disagreement before the consensus meeting was rarely more than 1 point different between coders on a given item. To avoid possible bias, the PDA coder pair and the follow-up-interview coder pair worked independently. There was absolutely no discussion between coder pairs regarding the data files being rated. The rating independence was ensured by retrieving the PDA data and the follow-up interview data from two separate files. The coders, therefore, could not be inadvertently biased by additional information that they might see about a given family. After all data were collected, PDA and follow-up interview coding sheets were matched using an alphanumeric case code.

Sample

At the onset of this study, we adopted the following definition of family: any combination of two life partners, with or without
children. Although this rather liberal definition of a family was adopted before data collection began, almost all of the families available for data coding in this study could be defined as more traditional (i.e., two parents and a child or children).

All family clients from the human service consulting firm, completing both a PDA and a follow-up telephone interview from 1993 until present, were included in the sample for this study (N = 110). Ninety-five percent of the expatriates were men. Most of the expatriates in this study had one of three nationalities: Canadian (n = 45), American (n = 25), or British (n = 19). The remainder (n = 21) were nationals of eight other countries: Australia, France, China (including Hong Kong and Taiwan), Iran, Vietnam, India, Dominican Republic, and Nigeria. They had been with their current employer for an average of 11.7 years. This was the first global assignment for 74% of the sample. The average age of the expatriates was 38 years, and the average age of their spouses was 36 years. Sixty-eight percent of the expatriates had made at least one short trip (of less than 1 month) to the host country prior to the global assignment.

Expatriates and their spouses had been married for an average of 11 years. In almost all cases, spouses accompanied the expatriates (97%). Nineteen percent of the expatriates had grown children (above the age of 20) who would not be accompanying them on the assignment. Eighty-nine expatriates had children accompanying them. Of these, 28% had three children accompanying them, 16% had two children accompanying them, and 45% had one child accompanying them. The average age of expatriates' children was 10.6 years.

These families had been assigned to one of 26 different countries: Australia, Belgium, Canada, Chile, China, Colombia, Dominican Republic, France, Germany, Hong Kong, India, Israel, Japan, Korea, Malaysia, Mexico, Poland, Philippines, Russia, Singapore, Spain, Switzerland, Tunisia, Turkey, United Kingdom, or Vietnam.

Measures

It is important to keep in mind that all of the measures in this study were quantitatively coded from qualitative handwritten notes. These data were not direct responses from the families. Therefore, each rated item in this study reflects the notes written by either the counselor (for the PDA) or the case manager (for the 6-month follow-up interviews). As described in a previous section, the coders read between one and three pages of detailed notes before a single item was coded.

All of the items were coded using a 4-point or a 5-point scale: High: "The family easily and quickly adjusts to new situations (from their previous moves)." Low: "Family members are overly preoccupied about not finding American foods and American recreational activities in Europe." Independent Variables

Family characteristics. There were six structured sections on the PDA that addressed family characteristics. For each section, the counselors' notes were coded. Each coded section reflects one item on the Family Characteristics scale. The first three sections represent the three family characteristics: family communication, family adaptability, family support. The latter three sections were general assessments the counselors had made regarding the families: family functioning, conflict resolution, and strengths and concerns of the family. All six were averaged for the overall Family Characteristics scale score (a = .79).

The coders used scale anchors to code the notes, which ranged from 1 (negative, the assessor has many concerns) to 4 (positive, the assessor has noted no concerns or only a trivial concern). Note that in the case of the family support variable, either "too much," or "too little" would be considered dysfunctional. As with the other variables, the level of dysfunctionality is a clinical determination. Therefore, we coded the notes regarding the level of dysfunctionality (which is a linear variable) and not the level of support per se (which is a curvilinear variable). The following are examples of what would have been rated high (4) and low (1) for three sample items.

Family communication:

High: "They (the family) listen sensitively to each other and pick up on verbal and nonverbal cues."

Low: "One partner is ignoring the other and dominating the session."

Family adaptability:

High: "The family easily and quickly adjusts to new situations (from their previous moves)."

Low: "Family members tell highly inappropriate ethnic jokes during the PDA."

Family support:

High: "Spouses feel comfortable asking for support and giving support. They have clearly established ways of supporting each other.

Low: "Spouses are expressing great dissatisfaction about support from each other."

Family support: only outside of relationship.
perceptions of cross-cultural adjustment:

friendships: rated high (5) and items. the following are examples of what would have been esse's and his or her spouse's responses were coded for these ment, interview, a 5-point likert-type scale was used: 1 maladjust- ment, 5 = high level of adjustment. the mean for family characteristics was 3.7 (sd = .4). see appendix a for the items and coding scales.

family's perception of the move. the family's perception of the move scale consisted of a single item coded from the pda, which was measured using a 4-point scale similar to that used for the other dimensions, but with slightly different anchors. the scale ranged from 1 (negative, many concerns/nega- tive feelings were noted) to 4 (positive, comments were positive, any negative comments noted were normal or expected). the mean score for this item was 3.5 (sd = .6); see appendix a for its coding scale.

family's perception of the move:

high: "family members have actively started researching the host culture—and are excited to see what they are currently learning."
"the employee pursued global assignment because they wanted to live overseas. this is a very moti- vated couple."
low: "family members expressed that they are not mov- ing by choice and that they are angry about the decision."
"signs of grief are apparent when they discuss leaving their home country."

mediator variable

four sections in the structured follow-up interview composed the family adjustment scale. for each section, the case managers' notes were coded, and each coded section reflected one item on family adjustment: overall adjustment, friendships, external supports, and the case manager's perception of cross-cultural adjustment (α = .83). for each of the items on the follow-up interview, a 5-point likert-type scale was used: 1 = maladjust- ment, 5 = high level of adjustment. both the expatriate employee's and his or her spouse's responses were coded for these items. the following are examples of what would have been rated high (5) and low (1) for two sample items.

friendships:

high: "all family members report having made good friends."
"spouses stated that they had many people they felt close to, both through church and work."
low: "family members said they felt isolated and lonely."
"they said they have not been able to make friends as yet."

perceptions of cross-cultural adjustment:

high: "i have no concerns about this family. they are so active and involved in the community. they really seem happy."
"family sounded very upbeat and positive about the whole experience."
low: "family members were already talking about ending this assignment early."
"family asked if we offered adjustment counseling because they were not happy about being there."

once coded, the items' means and standard deviations were calculated: family communication (m = 3.7, sd = .5), family adaptability (m = 3.8, sd = .5), family support (m = 3.8, sd = .5), family functioning (m = 3.8, sd = .5), conflict resolution (m = 3.6, sd = .5), and strengths and concerns of the family (m = 3.4, sd = .6). the mean for family characteristics was 3.7 (sd = .4). see appendix a for the items and coding scales.

dependent variable

the employment adjustment scale consisted of a single item from the follow-up interview. only the expatriate employee's responses were coded for this item. it was measured using a 5- point likert-type scale; 1 = maladjustment, 5 = high level of adjustment. the mean score for this item was 3.6 (sd = .9); see appendix b for its coding scale.

employment adjustment:

high: "expat enjoys his colleagues—says they are great people and very competent."
"expat feels as though she is getting all the things done that she needed to get done."
low: "expat is angry at the organization for sending him into such a bad situation."
"expat spoke about potentially quitting if things didn't get better soon."

control variables

past studies have suggested that certain demographic vari- ables may affect the outcome of a global assignment (e.g., church, 1982). in this study, these variables were included as control variables. the control variables in this study are whether the expatriate's spouse had a career before the assignment, whether the host country is developed, the age of the employee, the number of years the couple was married, whether this was the expatriate's first assignment, the expatriate's tenure with the organization, and whether the expatriate had spent time working in this country prior to the assignment. all of these control variables, with the exception of employment expectations, were collected on an intake sheet. the employment expectation variable was collected from the pda. the intake sheets were completed prior to the counselor's conducting the pda.

development level of host country. the united nations de- velopment programme's 1997 classification for countries was used to determine whether a country was developed or develop- ing: developed countries were coded with a 1, developing countries with a 0. seventy-five percent of the families were in developed countries. (all of the expatriates in this study, except
were going either from a developed country to a developed country or from a developing country to a developed country.

Spouse's career status before assignment. Spouses indicated whether they had had a career prior to the assignment. Career status was coded 1 if they had had a career, 0 if they defined themselves as a homemaker (or stated that they had not had a career). Sixty-nine percent of the spouses had had careers prior to the assignment.

Age and years married. The employee and his or her spouse indicated their ages and the number of years they had been married at the time of the PDA.

Tenure. The employee reported the number of years he or she had been with his or her current employer at the time of the PDA.

Previous assignment. The employee reported whether he or she had been on a previous global assignment. These data were coded as 1 if this was the employee's first assignment abroad, 2 if the employee had had a previous assignment lasting 2 or more years.

Previous time spent in host country. The employee reported whether he or she had spent time working or traveling in the host country. These data were coded as 1 if the employee had worked previously in this host country or had visited the host country prior to the assignment (this included short trips), 2 if the employee had never been to the host country.

Results

The correlation matrix for all variables included in this study is represented on Table 1. According to the correlational analyses, preliminary support was found for the first part of the model, which is based on the double ABCX theory. A positive relationship was found between Family Characteristics (e.g., communication, support) and Family Perceptions of the Move (r = .45, p < .01). Furthermore, Family Perceptions of the Move was positively related to Family Adjustment (r = .33, p < .01). A significant correlation also was found between Family Characteristics and Family Adjustment (r = .33, p < .01). This provides support for Hypothesis 1. In the same correlation matrix, the second part of our model (based on spillover theory) also had preliminary support. Family Adjustment had a positive relationship with Employment Adjustment to working in the host country (r = .51, p < .01).

To test the mediated model illustrated in Figure 1, a series of regression analyses were conducted. The method was somewhat more complex than the straightforward test of a mediated variable because the antecedent variable (relating to the mediator variable) is a moderated term (i.e., our proposed independent variable is the interaction of Family Characteristics X Perceptions of the Move).

Table 1

Means, Standard Deviations, and Intercorrelations of Study Variables

<table>
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<tr>
<th>Variable</th>
<th>M</th>
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<td>10. Family Characteristics</td>
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<tr>
<td>12. Employment Adjustment</td>
<td>3.63</td>
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<td>.03</td>
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<td>.05</td>
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<td>.09</td>
<td>.02</td>
<td>.51**</td>
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</table>

*p < .05. **p < .01.
and the independent variable. For this step to be met, the mediator should be statistically significant but the independent variable (our moderator) should drop to nonsignificance, thus supporting the mediator model.

In Step 1 (see Table 2), we regressed the proposed mediator (Family Adjustment) on the independent variables (Family Characteristics, Perceptions of the Move, and Family Characteristics × Perceptions). In support of Step 1 of Baron and Kenny's (1986) procedure, we found that the moderator (Family Characteristics × Perceptions) had a significant positive effect on Family Adjustment ($\beta = 1.42, p < .01$). This provides support for Hypothesis 2, suggesting that families who perceive the move as positive require fewer family coping characteristics, when compared with those who view the move as negative, in order to adjust to living in the host country. A graph of this moderated relationship is presented in Figure 2.

In Step 2 (see Table 3), we regressed the dependent variable (Employment Adjustment) on the independent variables (Family Characteristics, Perceptions of the Move, and Family Characteristics × Perceptions). Results suggest a significant positive effect of the moderator on Employment Adjustment ($\beta = 1.24, p < .05$), which supports Step 2 of Baron and Kenny's (1986) procedure. In the last step (see Table 4), we regressed the dependent variable on both the independent variable and the mediator. We found a significant positive effect of Family Adjustment (the proposed mediator) on Employment Adjustment ($\beta = .60, p < .001$), and the Family Characteristics × Perceptions (the moderator) was not significant. Also, the overall $R^2$ was significant ($.35, p < .001$). Thus, we found support for our mediator model because we met the requirements of all three steps of Baron and Kenny's (1986) procedure. This provides support for Hypothesis 3.

**Table 2**

<table>
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<th>Regression Analysis Predicting Family Adjustment (Step 1)</th>
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<td>Age of spouse</td>
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<tr>
<td>Years married</td>
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<tr>
<td>Previous assignment</td>
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<tr>
<td>Tenure</td>
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<tr>
<td>Previous time spent in host country</td>
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<td>Development level of host country</td>
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<td>Spouse's career status</td>
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<tr>
<td>Block 2. Family characteristics/ perceptions scales</td>
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<tr>
<td>Family Perceptions of Move</td>
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<td>Block 3. Moderator</td>
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<tr>
<td>Family Characteristics × Perceptions of Move</td>
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<tr>
<td>Overall $R$</td>
</tr>
<tr>
<td>Overall $R^2$</td>
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<td>Overall $F$</td>
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</table>

* $p < .05$. ** $p < .01$.  

**Figure 2.** Graph of the moderator variable, Family Characteristics × Family Perceptions of the Move, predicting family adjustment.

**Discussion**

This study is unique and contributes to the existing literature in several ways. First, although past studies on global relocations have surveyed couples (e.g., Black & Stephens, 1989), this study uses entire families. Second, these data are longitudinal, whereas most studies on expatriates use a cross-sectional design. Data were collected on the families both predeparture (before going overseas) and postarrival (after they had been on the global assignment between 6 and 9 months).

Third, these data were collected independently and for different purposes. The PDA was conducted by counselors for the purpose of assessment. The follow-up interviews were conducted by a case manager to determine whether the services were effective in predicting expatriate success and to ensure client service satisfaction. In addition, the sources for the data were different. Within the follow-up interview, the family adjustment items were coded from the combined responses of the spouse and the expatriate, whereas the employment adjustment item was coded only from the responses of the expatriate. Given the different
methods and sources of data collection across times, the possibility of common method bias should have been reduced. Last, these longitudinal data (the PDAs and the follow-up interviews) were retrieved from separate files. This method of data retrieval eliminated the possibility of bias during coding.

The hypotheses tested in this study are consistent with theories developed in the domestic work/family literature. Two theoretical perspectives were merged for the model we proposed (which included the three supporting hypotheses): family systems theory (e.g., Hill, 1949; H. L. McCubbin & Patterson, 1982; Minuchin, 1974) and spillover theory (e.g., Aldous, 1969; Crouter, 1984; Piotrkowski, 1979). This study found support for each of the three hypotheses and the proposed model (Figure 1).

Hypothesis 1 was supported, suggesting that a family’s characteristics are related to a family’s cross-cultural adjustment to living in a foreign country. Closely linked, Hypothesis 2 was also supported. This hypothesis suggested that families who possess a positive perception of moving internationally adjusted better to living in the host country when compared with those families with a negative perception of the move. Given that this model is based on a family’s adaptation to the perceived stressor, the perception of the move interacted with the family’s characteristics; Families that perceived the global relocation as “positive” required fewer family coping characteristics when compared with those who viewed the move as “negative,” in order to adjust to the host country. These findings concur with ABCX theory, within family system’s theory (e.g., Hill, 1949; Minuchin, 1974), for explaining the process that produces family adjustment. Consistent with the theory, these results suggest that a combination of (A) the stressor of the global assignment, (B) the family characteristics (e.g., support, communication) and (C) the family’s perception of relocating internationally, all relate to a family’s cross-cultural adjustment.

This study also found support for Hypothesis 3 and the last section of the proposed model (Figure 1), suggesting that family adjustment is a mediator of the relationship between family characteristics and expatriate adjustment to working in the host country. This finding is consistent with spillover theory. As spillover theory suggests, we found that the family’s cross-cultural adjustment was influenced by the expatriate’s adjustment to working in the host country. Our test of the overall model provides empirical support for the integration of family systems theory and spillover theory to provide a better understanding of the relationship between family characteristics, cross-cultural adjustment of families, and how family adjustment subsequently influences the expatriates’ adjustment to working in the host country.

Practical Implications

Given the results of this study, several practical implications can be suggested for multinational organizations.

Table 4

<table>
<thead>
<tr>
<th>Block 1. Control variables</th>
<th>β</th>
<th>t</th>
<th>R²</th>
<th>ΔR²</th>
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<td>Age of spouse</td>
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<td>Previous time spent in host country</td>
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<td>Spouse’s career status</td>
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<td>1.02</td>
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* p < .05. ** p < .01. *** p < .001.

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* p < .05. ** p < .01. *** p < .001.
sending expatriates and their families on overseas assignments. For example, there are certain organizational programs that can be extended to the spouses and children of expatriates, such as cross-cultural and language training, mentoring, relocation assistance, and job placement assistance for the spouse. These programs in a domestic context (i.e., the military) have produced increases in the family members’ perceived support of the primary wage earners’ employing organization. In these cases, the families, experiencing positive affect toward the organization, supported the employees in their position. This family support, in turn, was positively related to organizational commitment (Orthner & Pittman, 1986). Another practical implication of this study is to develop a variety of programs that would benefit family members at their various stages of development. Past research examining families in the American military suggests that programs consistent with the family’s life cycle are more effective at helping families (e.g., couples, preschool and school children, teenage children, newly independent children, and “empty nesters”; H. L. McCubbin & Lavee, 1986). Another implication of this study is that multinational organizations should attempt to assist their expatriate families in reestablishing their social support systems in their new locations (Cornille, 1993). According to Cornille (1993), the more quickly family members are able to reestablish themselves within a church, school, youth organization, employing organization, health and welfare organization, and so on, the more likely they will be to adjust to the new location.

Study Limitations

As with all studies, this study has its limitations. Although in this study the independent variable was quantified at the family-level, we recognize that any one family member (i.e., the expatriate, spouse, children) may either adversely or positively influence the entire family’s adjustment. The choice to aggregate at the family level was made because the focus of this study is on the family’s adjustment spilling over to the expatriate’s work adjustment. Given this, the specific family members who are causing the family adjustment are less important for this study. The antecedents for the individual family members’ adjustment (e.g., the spouse’s and children’s experience in the host country prior to the assignment) were beyond the scope of this article. Future studies should examine how individual family members could potentially influence the family-level adjustment.

This study used the expatriate’s ability to adjust to working in the host country as the dependent variable. Although this may be a possible indicator of the expatriate’s actual performance on the assignment, this is not a measure of performance in the traditional sense. Although performance was not directly measured, this should not undermine the importance of studying employment adjustment and the impact that it can have on the success of a global assignment (see, e.g., Black, 1988). We encourage future studies to include direct measures of performance; however, these data may be difficult to collect given that many multinational companies do not maintain performance records for their expatriate employees (Black et al., 1992).

This model was intended to explain only the family-related antecedents to an expatriates’ ability to adjust to working in a host country. Antecedents at other levels (i.e., other than the family) should be included in a more comprehensive model predicting expatriate performance. For example, successful expatriates tend to share certain personality traits or individual characteristics (e.g., Black, 1990; Church, 1982; Mendenhall & Oddou, 1985; Spreitzer, McCall, & Mahoney, 1997). These traits and characteristics enable expatriates (a) to be open and receptive to learning the norms of new cultures, (b) to initiate contact with host nationals and gather cultural information, and (c) to handle the higher amounts of stress associated with the ambiguity of their new environments (Black, 1990; Church, 1982; Mendenhall & Oddou, 1985).

Language skills and past foreign experience also have been linked to expatriate adjustment and success (e.g., Abe & Wiseman, 1983; Benson, 1978; Church, 1982; Cui & van den Berg, 1991). From a social learning perspective, the more contact expatriates have with host nations and the host culture, the greater the cross-cultural adjustment and the more successful the assignment will likely become (Bochner, Hutnik, & Furnham, 1986; Bochner, McLeod, & Lin, 1977). Therefore, prior experience with host nationals will improve cross-cultural adjustment and success of expatriate assignments. Future studies should examine these and other variables in the context of predicting expatriates’ performance on an overseas assignment.

Additional empirical tests of this theoretical model should be conducted in the future using multimethod ratings of the family characteristics (communication, support, adaptability) and family adjustment. Multiple raters also should be used to gather the family-level information. In addition to clinicians, ratings could be made by other family members to assess convergence across multiple raters. For example, clinicians could make professional assessments of the family as a unit, individual family members could make self-report ratings of their family, and so forth. Expatriate performance data also could be gathered using a multirater approach (e.g., leader ratings, peer ratings, self-ratings). To test the effects of existing family characteristics on expatriate performance, a longitudinal design gathering the family characteristic data
prior to going overseas and the family adjustment and expatriate performance data after they have lived overseas for a given period (e.g., 6 months) should be used.

Given the tremendous impact global assignments have on the multinational organization, the expatriate's career, and the expatriate's entire family, we believe examining the impact of the expatriate's family on the global assignment is a worthwhile research endeavor. As such, we believe that the well-established theoretical perspectives from the domestic literature on family and work provide a solid foundation to begin testing the influence of family in an international context.

References


Appendix A

Items for Perceptions of the Move and Family Characteristics

Family Perceptions of Move
Negative: Many concerns/negative feelings were noted
More negative than positive: Few positive comments were noted, mostly negative
More positive than negative: Few negative comments were noted, mostly positive
Positive: Comments were positive, any negative comments noted were normal or expected

Family Communication
Negative: Assessor has many concerns
More negative than positive: Assessor has noted more concerns than strengths
More positive than negative: Assessor has noted more strengths than concerns
Positive: Assessor has noted no concerns (or only a trivial concern)

Family Adaptability
Negative: Assessor has many concerns
More negative than positive: Assessor has noted more concerns than positive comments
More positive than negative: Assessor has noted more positive comments than concerns
Positive: Assessor has noted no concerns (or only a trivial concern)

Family Support
Negative: Assessor has many concerns
More negative than positive: Assessor has noted more concerns than strengths
More positive than negative: Assessor has noted more strengths than concerns
Positive: Assessor has noted no concerns (or only a trivial concern)

Family Functioning
Negative: Assessor has many concerns
More negative than positive: Assessor has noted more concerns than positive comments
More positive than negative: Assessor has noted more positive comments than concerns
Positive: Assessor has noted no concerns (or only a trivial concern)

Conflict Resolution
Negative: Assessor has many concerns
More negative than positive: Assessor has noted more concerns than strengths
More positive than negative: Assessor has noted more strengths than concerns
Positive: Assessor has noted no concerns (or only a trivial concern)

Strengths and Concerns of the Family
Negative: Assessor has many concerns
More negative than positive: Assessor has noted more concerns than strengths
More positive than negative: Assessor has noted more strengths than concerns
Positive: Assessor has noted no concerns (or only a trivial concern)

(Appendix B follows on next page)
## Appendix B

### Items for Expatriate Adjustment and Family Adjustment

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<tr>
<td>Unhappiness or dissatisfaction is expressed to interviewer immediately</td>
<td>Mostly all negative comments were noted, few positive</td>
<td>Having some difficulty in the adjustment process</td>
<td>Any difficulty noted is not a major concern</td>
<td>Very enthusiastic</td>
<td>Happy about being there (e.g., travel, work, family interactions)</td>
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<td>Friendships</td>
<td>Negative, but hanging in there</td>
<td>Both positive and negative comments were noted</td>
<td>Reports, for example, “doing fine,” “OK,” “settled,” “going well,” “pretty well”</td>
<td>Reports, for example, “loving it,” “doing really well”</td>
<td></td>
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<tr>
<td>Possibly expresses desire to return home</td>
<td>Many complaints</td>
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### Family adjustment overall

1. Maladjusted
2. Somewhat maladjusted
3. Adjusted
4. Well-adjusted
5. Very well-adjusted

### Perceptions of the family’s adjustment

1. Seems like additional help is needed immediately, the family is in serious trouble
2. Seems like additional help may be useful, family seems to be running into some problems now
3. Additional help could be useful in the future, family might run into some problems in the future
4. Additional help is not likely to be needed, the family seems to be doing OK
5. Additional help is not needed, the family is clearly doing very well

### Expatriate’s adjustment to employment in the host country

1. Maladjusted
2. Somewhat maladjusted
3. Adjusted
4. Well-adjusted
5. Very well-adjusted