



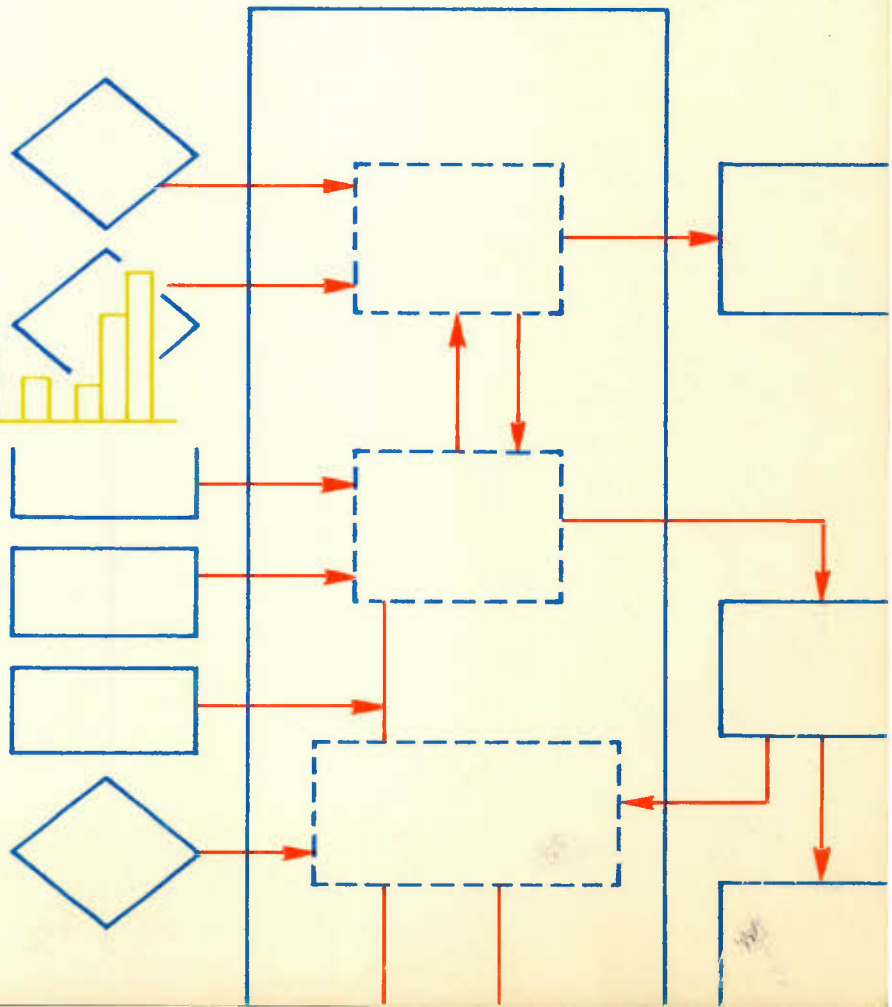
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DISCUSSION PAPER NO. 100

What's OWL?
Definition, Notes, and Bibliography

by

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Résumé

The would-be researcher in the complex multidisciplinary field of investigation known as the Quality of Working Life (QWL) is beset by a virtual flood of documentary material in recent years. Yet, perhaps because of the relative recency of QWL issues, at least in their modern guise, there exist as yet relatively few examples of broad attempts to define the field or to erect a systemic framework of the essential relationships. Nor, as yet, are there many examples of comprehensive bibliographies to which the uninitiated might turn.

With these considerations in mind, the purpose of the present work is two-fold. In the first instance, the aim is to set out a suggested delineation of the field, along with a comprehensive framework of QWL interrelationships which provides a starting point for hypothesis-testing, empirical investigation, and policy formulation.

The second major objective is to organize in systematic fashion a selection of references relating to various aspects of QWL which we have encountered. It is our hope that this effort will prove helpful in abbreviating the time-consuming process of the compilation and organization of bibliographic material which the neophyte must ordinarily undertake.

Résumé

Ces dernières années, le chercheur qui pénètre dans le domaine multidisciplinaire complexe qu'est la qualité de la vie au travail est virtuellement inondé par l'abondance de la documentation existante. Cependant, peut-être parce qu'il s'agit de questions encore récentes, du moins en ce qu'elles sont vues sous un jour nouveau, il n'existe encore que relativement peu d'exemples de tentatives sérieuses de délimiter le domaine ou d'ériger un cadre systématique des relations essentielles. Rares sont également les bibliographies complètes que les non-initiés pourraient consulter.

Dans ces circonstances, le présent travail poursuit un double but. Il vise d'abord à formuler une démarcation du domaine ainsi que d'un cadre global de ses interrelations pouvant servir de point de départ à la vérification des hypothèses, à la recherche empirique et à la formulation de politiques.

Le second grand objectif consiste à présenter de façon systématique une sélection de travaux de référence touchant les divers aspects de la qualité de la vie au travail que nous avons abordés. Nous espérons que cet effort s'avérera utile en abrégant le long processus de compilation et d'organisation du matériel bibliographique que doit ordinairement entreprendre le néophyte.

Acknowledgements

Marvin Schwartz assisted greatly in the early stages of reference compilation; Hélène Valentine good-naturedly handled hundreds of requests for various library services; and Betty Morris patiently supervised the typing of some scarcely decipherable manuscripts. Dave Henderson lent valuable encouragement and support. We thank them all while ourselves assuming responsibility for the shortcomings of the document.

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Introduction

The body of literature in the field now commonly known as the "quality of working life" (QWL) has grown steadily over a period in which the industrialized nations have increasingly come to question the role and status of human beings in the modern technological environment. In recent years concern with the nature of work, its impact upon people, and their attitudes towards it, seems to have sharpened. Investigation of, and experimentation with, the qualitative aspects of working life -- its ability to confer self-fulfilment directly, for example, as opposed to being a means of acquiring goods -- has gained momentum under the influence of a unique set of economic, social, political and technological factors. The outpouring of books, reports, and articles from a wide variety of sources has, not surprisingly, grown apace.

However, it is not only the confluence of historical circumstances -- ever-accelerating technological change, rapidly shifting attitudes, life-styles, and social institutions, and the paradox in many countries of a customary prosperity threatened by doubts as to future economic performance -- that has spurred this massive outpouring. We would argue that it derives also from the fact that researchers and practitioners are tending more and more to approach QWL from an interdisciplinary vantage point. That is, while organization theorists, economists, industrial engineers, social psychologists,

physicians, and industrial relations analysts have long examined their various aspects of the field, there is growing recognition of QWL as a "multidiscipline". And the resultant effects upon the process of research and publication have been clearly synergistic.

The would-be researcher in the QWL field is thus inevitably faced with a rather chastening experience of exposure to unfamiliar ground, particularly if, as in the present case, his training is largely confined to a single discipline. The processes of 'getting a feel for' various areas and amassing a set of references on various issues and topics are frequently very time-consuming. It was this consideration along with the continuing high level of interest in QWL which prompted the preparation of the present bibliography. For, the sheer volume of its constituent literature notwithstanding, QWL *qua* QWL has existed for only a decade or less, and there have appeared till now relatively few comprehensive overviews and/or bibliographies.

Our aim is to reduce, for other wanderers in this field, the time required to gain some familiarity with the terrain. It is hoped that although our selection of references and the structure of our approach reflect unique personal biases, an explicit statement of our view of QWL will at least provide readers with a starting point for their own formulations. The following section therefore provides a sketch of the approach to QWL which underlies the organization of the bibliography.

The Underlying Framework

Since QWL may, as described above, be addressed and analysed by way of a number of disciplines, attempts to effect a precise delineation of its boundaries and subject matter are enormously difficult, if not impossible. The complex business of definition is a study in itself. Thus the following paragraphs must be regarded simply as a modest attempt to indicate some of the main dimensions and subject matter of this broad field.

The literature affords few explicit definitions, though in a number of cases one may extract inferentially the author's implicit view of the contents of the discipline. Several writers lay considerable emphasis on those aspects of the field that are 'new' -- those features which distinguish contemporary issues from the time-honoured concern for the welfare of men and women in the workplace. Barbash, for example, emphasizes a set of factors which constitute what he calls the New Organizational Ethic.¹ Herrick and Maccoby² may usefully be consulted for a particularly action-oriented concept of QWL which synthesizes the criteria for the success

1 Jack Barbash, "International Perspective on Work in a Changing Industrial Society," *Rivista Internazionale di Scienze Economiche e Commerciali*, Anno XXIII, April 1976, no. 4, pp. 308-331.

2 Neal Q. Herrick and Michael Maccoby, "Humanizing Work: A Priority Goal of the 1970's," in L. E. Davis and A. B. Cherns (eds.) *The Quality of Working Life* (New York: The Free Press, 1975).

of work humanization into a set of principles. A somewhat broader perspective is represented by Delamotte and Walker's³ approach to work humanization which, while emphasizing the breadth and the historical antecedents of QWL, identifies two important strands of the contemporary wisdom: first, the renunciation of the assumption of technological determinism and the demand that technology and work organization be changed to provide more fulfilling work assignments and, secondly, the concept of worker participation.

Our own eclectic view of QWL involves five broad components -- topic areas which together constitute one way of defining the field of enquiry. They are as follows:

I Access to Work

By this is meant the factors which affect the ease or otherwise with which an individual may enter the work world, including

- (a) societal mores and familial attitudes to work, which may facilitate, or discourage, the employment decision. For the mid-60s hippies, for example, taking a job was a 'sell-out.' On the other hand, women's lib (and the pill) has done much to encourage the participation of women in the labour force;

3 Yves Delamotte and Kenneth F. Walker, "Humanization of Work and the Quality of Working Life -- Trends and Issues," *Bulletin of the International Institute of Labour Studies* No. 4, pp. 3-14.

- (b) discriminatory hiring practices with respect to age, race, and/or sex, which are now crumbling slowly under the weight of legislative provisions in a number of countries;
- (c) restriction of supply, by unions and professional organizations by means of arbitrary standards of qualification for entry. On the demand side, access to jobs may be frustrated by the practice of "credentialism" by employers;
- (d) the number of job opportunities, by type and location and, therefore,
- (e) the conformity of the education, training, and skill levels of the populace to the characteristics of the job structure. A further corollary is, therefore, the importance of
- (f) the availability of education and training programs to the working-age population;
- (g) the availability of labour market information.

II Net Attractiveness of the Employment Package

This component also embraces a number of elements, including

- (a) the nature of the work -- manual, cerebral, etc. -- and its social prestige;

- (b) pay and fringe benefits, which cover such items as the hourly or monthly wage or salary, provisions for overtime, paid holidays and vacations, other paid absences, sickness and life insurance, severance pay and unemployment insurance, and pension provisions;
- (c) the time dimension of the work: length of the working day and working week, and coffee- and lunch-break provisions; vacation rights and the number of paid holidays; part-time or full-time work; seasonality; shift-work; frequency of overtime; flexible hours, etc.;
- (d) physical conditions of work, which embraces such factors as: proximity to domicile; exposure to excessive heat, light, humidity and hazards; air impurity; and access to rest, hygiene, and food facilities;
- (e) technology: quantity and sophistication of capital equipment; workplace layout and design; machine pacing, quantity and quality control standards; and job design;
- (f) organizational structure -- which can be hierarchical and autocratic or autonomous, co-operative and participative, and

- (g) opportunities for promotion, access to training and "continuous learning".

Concern for the adequacy of such characteristics of employment is certainly a large part of the subject matter of QWL. It is not, however, the whole story. Further crucial components are necessary to round out our definition.

III Perceptions, Attitudes and Responses

The perception of the various factors listed above colours the response, physical and psychological, of individuals to their work environment. The complex dynamic process by which they shape attitudes towards work, satisfaction, aspirations, and motivation therefore constitutes a third major area of QWL enquiry. Examples of specific issues include the following:

- (a) the impact of the types of factors listed in subsections I and II above upon job satisfaction and work attitudes;
- (b) the interrelationships among such variables as job satisfaction, motivation, effort, and performance; and
- (c) the *manifestation* of alienation, dissatisfaction, etc. in terms of industrial accidents and disease, absenteeism and turnover, drug and alcohol abuse, strikes and grievances, and pilfering and sabotage.

IV Actors and Their Interrelationships

The individual worker is frequently the focus of investigation, but modifications to the working environment clearly have far-reaching implications for other interested parties. An important aspect of QWL enquiry therefore concerns the objectives and attitudes of, and interactions among, the principal actors:

- (a) workers and their unions (whose interests and attitudes may differ);
- (b) employers and their associations;
- (c) governments as representatives of society and framers of legislation.

V Measurement

The four components outlined above are inevitably approached from a variety of directions. Managers and workers seek to make practical improvements in the workplace; social scientists conduct and monitor experiments, construct theories and amass evidence; and governments formulate policy. The *sine qua non* of all these activities, however, is the process of observation and measurement, which constitutes our final component of the QWL field. The types of issues which arise in this area include

- (a) the level of examination: macro, micro, industry, firm, or individual;

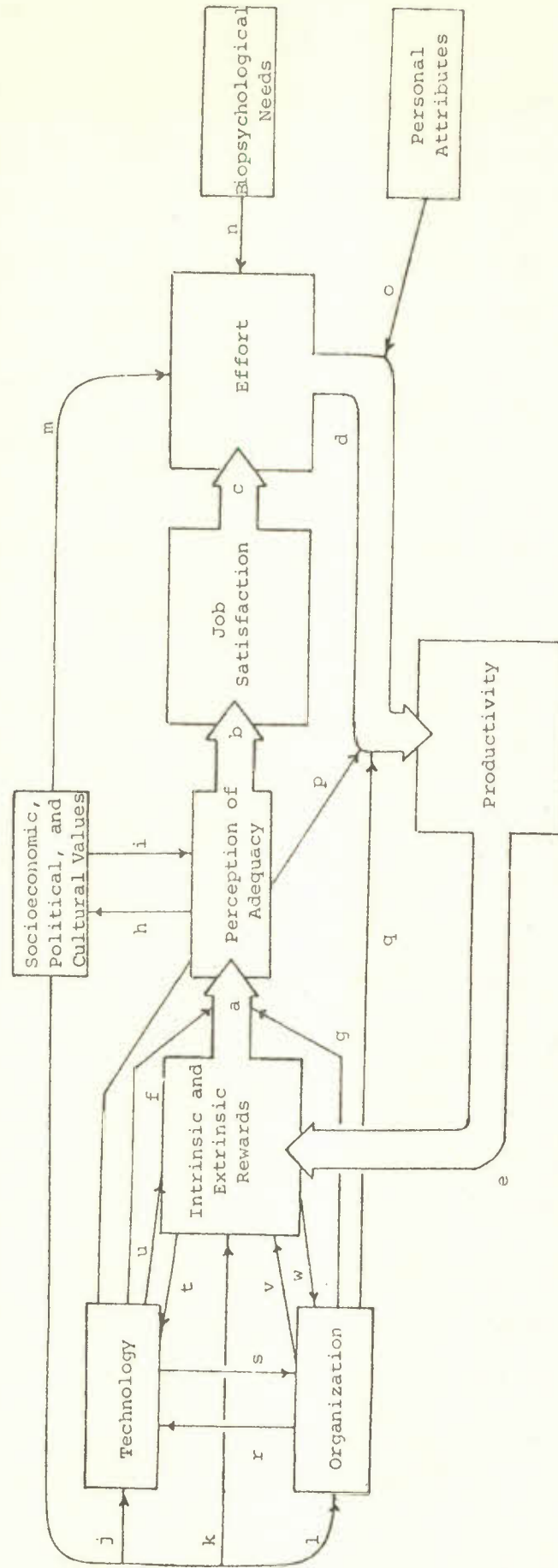
- (b) the type of data to be used: 'hard' quantifiable information or 'soft' attitudinal data;
- (c) the method of data generation: administrative records, sample survey, interview, etc.; and the characteristics of the instruments used;
- (d) the general methodology and specific techniques for analysis of the data generated, and
- (e) underlying theoretical considerations.

If there is a single unifying thread to the various components we have outlined it is the concept of interrelationship. Accordingly we present in Figure 1 a schematic framework of QWL relationships, a description of which may further elucidate our perception of the field.

The heart of the relational framework⁴ is shown by the heavier arrows in the diagram. Starting at the left-hand side, therefore, we have the set of factors which combine to affect job satisfaction in the individual. The worker's perception of the adequacy of his working environment and the translation of that perception into job satisfaction is shown by the arrows (a), (f), (g) and (b). Technology, organization, and intrinsic and

4 Essentially a modified version of the system portrayed in L. W. Porter and E. E. Lawler, *Managerial Attitudes and Performance* (Homewood, Illinois: Irwin Dorsey, 1968).

Figure 1
A Reference Framework of QWL Relations



extrinsic rewards together constitute what we call the characteristics of the working environment. They require further elucidation. We define *technology* as encompassing the physical structure of production including physical size of plant, amount of capital, plant layout, and job design. By *organization* we mean the nature and extent of reporting lines, the relationship of the various functions within the enterprise, the degree of autonomy, the management philosophy, etc. *Intrinsic and extrinsic rewards* are conventionally defined to represent the usual spectrum from wages through opportunities for self-actualization. The interrelationships between technology and organization will, on these definitions, determine physical characteristics of the workplace such as heat, noise, ventilation, and rest, hygiene and food facilities -- see arrows (r) and (s).

The interrelationships among the three sets of factors defined above are of two main types. Since the factors, in total, constitute major determinants of satisfaction, there exists the possibility of altering their mix: *trade-offs* exist between them. In addition, however, the factors may manifest a *modifying interdependence*: the very nature of the organizational hierarchy may affect the characteristics of the reward system, for example, and *vice-versa*; there may be technological constraints upon the feasibility of organizational change, etc. The whole set of such interrelationships is shown by the arrows (r), (s), (t), (u), (v) and (w).

The individual's *perception of the adequacy* of his working environment is seen to be coloured by the values, attitudes and beliefs of the society in which he lives and, simultaneously, feeds back into that societal value system, as shown by arrows (h) and (i).

The amount of *effort* put forth by the individual is held to depend upon the degree of satisfaction with his job (arrow (c) and upon societal mores such as the Puritan work ethic (arrow (m)). His particular array of *inherent desires and needs*, the urgency of their fulfilment, and his perception of the instrumentality of certain behaviour patterns in attaining desired ends, will also affect the individual's work effort (arrow (n)).

The translation of individual effort into *productivity* then depends on the quantity and quality of certain complementary factors. Thus, the extent to which the worker's desire to produce is realized will depend upon his *personal attributes*, including education, experience, and a variety of skills (arrow (o)). In addition, the design of his job and the available machinery and equipment with which he works (arrow (p)), as well as the organizational climate within which he operates (q) will likewise affect his productivity. It is important to note that productivity, in our framework, is broadly defined to cover the set of behavioural reactions on the part of workers which determine, in net terms, their productivity. That is, the satisfaction-effort-productivity nexus may yield a variety of manifestations: the worker may be more or less diligent; more or less inclined to quit; more or less inclined to take time off; more or less inclined to strike.

Finally, we must bear in mind that *the values of the society at large* may influence profoundly the characteristics of the working environment. The choice of technology, for example, in terms of the capital/labour ratio, will reflect society's implicit valuation of the factors of production (arrow (j)). The organizational structure will likewise reflect society's tastes with respect to discipline, authority, democracy, participation, autonomy, etc. (arrow (l)), just as the reward system may in some respect embody societal notions such as occupational hierarchy, "a living wage", and so on (arrow (k)).⁵

The framework outlined above affords a view of some of the essential relationships which help to define the QWL field. The nature of those relationships is at once the basis for the formulation and testing of hypotheses, a focus of measurement, and a guide to action.

As far as theory is concerned, the emphasis is upon illuminating the nature of the relationships -- the weights and the directions of influence of various factors, singly or in combination. As to measurement, our knowledge of the network of causes, effects, and associations greatly assists our choice of the appropriate variables to be monitored. Finally, the framework is useful in identifying the areas which are capable of treatment by workers, employers, and government to achieve their respective goals.

5 The characteristics of the working environment no doubt feed back into society's standards and beliefs, but this has been omitted from the diagram in the interests of simplicity.

Institutions, Sources, and Applications

There is little doubt that QWL has taken on the characteristics of a 'movement' in recent years, and the purpose of the present section is to provide some brief orientation as to the institutions abroad, and in Canada, which conduct research, give courses, and proffer consultative advice, provide documentary material and/or constitute real-world examples of the application of QWL philosophy.

A major landmark in the evolution of QWL studies was the conference at Arden House, Harriman, New York in September 1972, which brought together experts from Western Europe and North America. The conference served the purpose of establishing links between a number of 'nodes' of QWL activity in various countries. Prominent among these are the Center for Quality of Working Life at U.C.L.A., which is particularly associated with the names of Professors Davis and Cherns; the Tavistock Institute, and the Work Research Unit of the Department of Employment, in London; l'Agence Nationale pour l'Amelioration des Conditions de Travail, in Paris; the Work Research Institute in Oslo; the Swedish Council for Personnel Administration in Stockholm; the Institute for Social Research at the University of Michigan; the Work in American Institute in Scarsdale, New York; and the National Quality of Work Center in Washington. In addition the OECD, the ILO, and the International Institute for Labour Studies undertake research in the QWL field, and there is now an International Council for

the Quality of Working Life (JCQWL) which is explicitly designed to act as a service to the existing network of centres ("nodes") and to aid in the establishment of future "nodes".⁶

Developments in Canada have so far been rather modest, though a few important events should be mentioned. First, the Federal Department of Labour, in keeping with its continuing interest in conditions of work in Canada, convened a symposium on social indicators of working life in 1973 which undoubtedly did much to spur an interest in QWL in this country. Secondly, the federal Department of Manpower and Immigration, investigating causal factors to explain the resiliently high levels of unemployment experienced in Canada in the early 70s, addressed the hypotheses of fundamental change in work attitudes and the demise of the work ethic. Nationwide surveys and subsequent analysis culminated in the publication of *Canadian Work Values*, which reports on the work attitudes and job satisfaction of a sample of adult Canadians stratified by age, sex, region, and marital status. Third, the Ontario Ministry of Labour has taken an action-oriented approach to QWL which involves dissemination of information to business and labour, the diagnosis of potential "trouble spots,"

6 For a more detailed description of the growth of interest in QWL and related institutional developments, see Y. Delamotte and K. F. Walker, "Humanisation of Work and the Quality of Working Life -- Trends and Issues," *Bulletin of the International Institute for Labour Studies*, No. 11, pp. 3-6; and Louis E. Davis, "Enhancing the Quality of Working Life: Developments in the United States," *International Labour Review*, vol. 116, no. 1, July-August 1977, pp. 53-65. Information on the ICQWL may be obtained from Professor A.T.M. Wilson (General Secretary), London Graduate School of Business Studies, Sussex Place, Regent's Park, London NW14 5SA.

and the fostering of new innovative work arrangements in the province. The ministry has recently established a multipartite Advisory Committee on the Quality of Working Life.

Research, teaching, and consultation services are also being provided in a number of academic institutions in Canada, including York, Queen's, and McGill Universities, and École des Hautes Études Commerciales. There are, in addition, a number of Canadian examples of projects designed to promote work humanization, job enrichment, etc. Some Canadian cases involving various aspects of industrial democracy are documented in a speech delivered to the Personnel Association of Toronto by Charles Connaghan, in May 30, 1977. In addition, three federal government initiatives in the QWL area, along with other Canadian cases, have been reported in recent issues of the *Labour Gazette*.

Furthermore, it is quite apparent that the federal government plans to become more actively involved in QWL issues, as evidenced in the October 1976 Speech from the Throne. "Among the proposals were the establishment of an industrial safety and health centre, a collective bargaining information centre, greater worker participation in decisions affecting working conditions, and a national advisory institution, 'dedicated to improving the quality of life in the workplace'."⁷ According to recent speeches

7 Wayne Cheveldayoff, "Federal Government Will Try to Improve Bargaining, Work Conditions," *The Globe and Mail*, October 13, 1976, p. 8.

by Labour Minister John Munro, his department is apparently going ahead with the establishment of a National Quality of Work Life Centre which, at least at the outset, would serve as a clearing-house for the compilation and dissemination of QWL information.

As far as general sources are concerned, the beginning student would find the two-volume work edited by Davis and Cherns, entitled *The Quality of Working Life*, an invaluable guide. Also useful are *Work and the Quality of Life*, edited by James O'Toole, *Work in America*, prepared by the special Task Force to the Secretary of Health, Education, and Welfare, and Studs Terkel's delightful *Working*.

For current developments the monthly *World of Work Report* published by the Work in American Institute, Inc., and the *Newsletters* of the International Council for the Quality of Working Life, are most helpful.

Extensive bibliographical files are maintained by the Center for Quality of Working Life at U.C.L.A., the Institute for Social Research at the University of Michigan, and the ILO. An annotated selection of references is also available from John Runyon at the Canadian Government's Department of the Secretary of State in Ottawa.

Organization of the Bibliography

It is hoped that the preceding section will furnish the reader with an insight into the broad outlines of the approach to QWL which has spawned our set of references. It must be emphasized that the bibliography is, inevitably, incomplete in two respects. First, we cannot reasonably hope that it will meet the particular needs of all travellers in this enormous domain. Our more modest aim has been to provide a guide to our own itinerary. Many users will no doubt wish to spend more time in particular areas and explore the ground more fully, while others will want to branch off on paths we have not followed. Secondly, the passage of time itself changes radically some features of the landscape; new items of interest are constantly appearing. With respect to this latter problem we would recommend highly the use of a bibliographical updating service of the type provided by the Canadian Institute for Scientific and Technical Information at the National Research Council in Ottawa.

Since the bibliography is a by-product of our on-going research rather than an end in itself, no attempt has been made to provide summary notes of each individual reference. Instead, we have attempted to provide, for each major subject area, an introductory overview of a few pages. Next, it should be pointed out that while we have attempted whenever possible to impart a distinctly Canadian flavour to the set of references it remains true that the absence to date of a national framework of QWL research

and practice has made it difficult to identify and unearth Canadian material. Indeed, we foster the hope that the present work may encourage in some small way the establishment of contacts, and exchange of information, between persons interested in QWL in this country.

The structure of the bibliography is shown in the Outline, below, which contains seven major subject areas. These subject areas are, in turn, broken down into sub-topics. A coding system is employed to identify a sub-topic (coded by a capital letter) within a subject area (coded by number). Thus 3P, for example, identifies the third of the seven subject areas, Aspects of Job Context, and sub-topic Pay.

Many of our references naturally relate to more than one subject area and, where this is the case, we have included, at the end of the reference, the appropriate cross-reference code.

Finally, we have included a last-minute Postscript which contains references which have come to our attention since the main body of the bibliography was compiled.

Classification Outline

1. General References

1O -- Overviews

1B --- Background: parallel developments in
other disciplines

1F -- The future of work

2. Accessibility of Work

2E -- Education, skills, training

2D -- Discrimination: sex, age, ethnicity, religion

2N -- Information networks

3. Aspects of Job Context

3T -- Time: hours of work; work/leisure; flexitime;
holidays, vacation; overtime, etc.

3P -- Pay: remuneration; cost of fringe benefits

3B -- Benefits: qualitative aspects of non-pecuniary
benefits of the employment contract,
collective agreement, and/or labour
legislation

3G -- General, miscellaneous

4. Sociopsychological Factors and Relationships

4H -- Specific studies of Herzberg's
two-factor theory

4G -- General: Job satisfaction, motivation,
productivity, work attitudes

5. Manifestations of Workplace Malaise

5H -- Occupational health and safety; alcoholism;
drug abuse; mental illness

5A -- Absenteeism

5T -- Turnover, quit-rates

5C -- Counterproductive behaviour: sabotage, pilfering

5S -- Strikes, disputes

5G -- General: alienation, unrest

6. Strategies of Work Humanization

6S -- Sociotechnical design: job redesign,
enrichment, rotation, enlargement

6I -- Industrial democracy, worker participation,
ESOP, etc.

6G -- General

7. Measurement and Methodology

1. General References

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1B -- Background: parallel developments in other disciplines	30
1F -- The future of work	32

1. General References

The aim of this section was to draw together some references which provide the reader with a broad-brush sketch of QWL as a prelude to a more detailed examination of some of its components. We have tried, in other words, to address the popular question of "what is QWL?" To this end, an attempt is made to impart some general appreciation of the dimensions of the field and some of the concepts and issues involved; to furnish at least a glimpse of theoretical considerations and their underlying interdisciplinary cross-currents; to aid an understanding of the evolution, and present importance, of QWL; and to offer a taste of the large and growing volume of documentary evidence of the institution and practice of QWL programs.

10 -- Overviews

Since some of the more important references have been cited already in the Introduction, and our own view of QWL, synthesized from many sources, is contained there also, we do not propose to repeat earlier comments concerning definition. Rather, we would simply add that the work of Davis and Cherns is particularly comprehensive in that the first volume deals with "Problems, Prospects, and the State of the Art," while the second is devoted to "Cases and Commentary."

1B -- Background: parallel developments in other disciplines

The concept of 'perspective' is an important one for the neophyte in the QWL field, and in this respect three aspects of this section appear important, First, it should

be understood that QWL, though by no means a new concern, has acquired the currency of its recent popularity against the backdrop of other unique changes in society such as are described as the 'value explosion of the sixties' and 'the cultural revolution' in articles by Gartner and Riessman and by Berger, respectively. Secondly, QWL has acquired the characteristics of a truly international movement, as a glance at the ICQWL's *Newsletter* will serve to illustrate. Thirdly, a certain coalition of natural and social science disciplines is another development not unrelated to the blossoming of QWL. The multidisciplinary nature of QWL research is poignantly illustrated in a useful paper by A.T.M. Wilson, which offers examples, with brief comments, of English language sources of publications relating to "research, development, experimentation and discussion on the place of work in life as a whole, on the nature and relation of men to machines, and on the internal and external environment of work in its physiological, social, technological, economic, and political aspects."¹ Eleven overlapping sources are covered: i) social philosophers and commentators; ii) economists and others on the impact of technological change; iii) field studies by social anthropologists; iv) ergonomics and related disciplines; v) sociologists and psychologists with interests in industry; vi) engineers and technologists; vii) research

1 A.T.M. Wilson, "Quality of Working Life: Comments on Recent Publications in English," London Graduate School of Business Studies, U.K.: Background Paper for Workshop of International Federation for Automatic Control on Social Effects of Automation, Enschede, The Netherlands, November 1977.

groups concerned with work reorganization; viii) analyses of actual and potential legislation; ix) industrial executives and management associations; x) labour union writers; and xi) policy statements by governmental and paragovernmental agencies.

1F -- The Future of Work

Last, a number of works are concerned with the question of the future of work. That is, they view present developments as one phase of a longer-term process of transformation of the nature of work. Two articles -- those by Cazes and Johnston -- utilize a 'scenario' approach which outlines possible future alternatives, while the article by Cox concentrates more on the methodology of futurology. The provocative views of Norman Macrae concerning the prospects for radical organizational and technological change contain fascinating implications for the role of work in society. Finally, the social policy requirements of post-industrialized societies are discussed in the articles by Günter and by Perrin.

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2. Accessibility of Work

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2. Accessibility of Work

The rationale for the inclusion of this section lies in our belief that QWL should encompass considerations of the ease or difficulty encountered by the individual in securing employment.

2E -- Education, skills, training

The individual's human capital is obviously one of the important attributes affecting his or her chances of obtaining desired employment. The congruence of the education and training system, on the other hand, and the requirements of employers, on the other, is therefore a matter of concern. Increasingly, also, it is understood that in economies characterized by rapid technological change, human capital quickly becomes obsolete and the need for retraining emerges with greater frequency. The important corollary is, of course, that the traditional chronological sequence of school and work is no longer appropriate: a life-cycle approach involving several periods of retraining, or "continuous learning", is required.

2D -- Discrimination: sex, age, ethnicity, religion

The other important aspect of accessibility has to do not so much with the individual's abilities as with other personal characteristics. The idea persists among some employers that workers of one race are more industrious than those of another, for example, or that young people

are irresponsible, and so on. While skin-colour per se is perhaps less of a basis for discrimination in Canada than in the United States, ethnicity is nevertheless an important factor in a country with so many immigrants.

Moreover, discrimination on the basis of sex is particularly pertinent to Canada, where female participation rates have risen so dramatically in recent years.

2N -- Information networks

The quality and availability of information concerning job markets are also crucial factors in determining the individual's probability of securing his or her desired form of employment. Some recently acquired references concerning linguistic information networks are included in the Postscript.

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3. Aspects of Job Context

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3. Aspects of Job Context

The title of this section derives from the distinction that is frequently made between the job context and the job content. The latter concerns the specification of the actual tasks to be performed and the inherent variety, autonomy and challenge of the work. The former, by contrast, has to do with the basic elements of the employment package such as hours of work, rates of pay, and types and amounts of benefits. Such factors are integral to the study of QWL because of the emphasis placed upon them in contractual and legislative demands by individual workers and their unions.

3T -- Time: hours of work; work/leisure; flexitime; holidays, vacation; overtime, etc.

This subsection lists works involved with time as it affects the Quality of Working Life. The topics covered under this label can be divided into five identifiable areas. First, there are articles such as that by Hameed (1975) which deal with the number of hours of work. They include discussions of such factors as the shortening of the work week, overtime, and the effects of the shorter work week upon the workers' performance. The second QWL-time issue that is dealt with in the literature is the familiar time-leisure choice: the decision to take the benefits of technological advance either in the form of increased non-work activity, or in the form of increased wage rates, i.e., monetary gain. Ross (1972) provides a useful discussion of some of the issues in this area.

A third time-related topic is the *distribution* (and not just the number) of hours during the week. Such trends as "flexitime" and the compressed work week -- squeezing five days of work into 3 or 4 -- are discussed here. Employee attitudes to these programs and the effects they have on productivity are also inspected. Robertson and Ferlejowski have co-authored an extensive set of case studies in this area. A fourth area of time-related QWL research is in the employment versus overtime controversy. Researchers such as Ehrenberg (1970, 1971) and Garbarino (1964) have assessed the impact of increased overtime on the level of employment. They introduce the trade-off between the premium pay in employing excessive (overtime) hours and the fringe benefits and turnover (Section 5T) costs of employing more bodies. The fifth and final time issue is lifetime hours, where authors such as Parkyn (1973) analyse how people have allocated their time throughout their lives among work activities, leisure and education. Early retirement is an issue here, as it is in the Access Section, Age Discrimination, 2D.

To sum up Section 3T; we may say there are five neat topics within this area, namely: 1) number of hours, 2) hours versus leisure, 3) the distribution of hours, 4) overtime hours versus employment, and 5) lifetime hours. In passing we may note that the 2nd and 4th subtopics obviously overlap with Pay (3P) issues, and are cross-referenced as such in the bibliography.

Also, articles concerned with time lost because of strikes, absenteeism, alcoholism and accidents are excluded -- these will be listed more appropriately in the various subsections of "Manifestations", Section 5.

3P -- Pay: remuneration; cost of fringe benefits

Pay continues to be an important aspect of the job context. As with the time dimension, we can identify in the literature certain key issues within the compensation context. First, there are articles and books measuring the cost of labour in general. These works often look at rising wages over time, or measure the monetary value of various non-pecuniary fringe benefits such as holidays and sick leave, as well as overtime. Labour Canada and the Thorne Group periodically furnish information on this subject. Another significant issue revolves around a controversy mentioned above within the time context. It is a choice confronted by the employer: whether to utilize more hours (at an overtime rate) or hire more bodies (with their attendant training and benefit costs). The next subtopic is also time-related. It is the choice that must be made by the employees: whether to accept the fruits of technological advance in the form of greater pay increases, or greater amounts of leisure activity. The issue is addressed in Enzer, Little, and Lazar (1972). A fourth pay-orientated area of research is in the impact of pay on worker performance -- that is, how one's earnings constitute an incentive to "work

harder". Several authors, notably Schwab (1974) and Whyte (1955), have contributed to this area of research. Obviously, within this subtopic, cross-references are made with Section 4, the sociopsychological side of QWL. Next within the compensation aspect we may identify another pressing problem -- the notion of "equity". Jacques (1961) and others have investigated employees' comparisons of their earnings with those of people with certain identified characteristics such as education, tenure and age. Pay equity, in this light, may be related to motivation and thus to sociopsychological factors (Section 4G) as well as to discrimination (Section 2D). Finally, two more topics that will be broadly termed pay issues are "guaranteed income" -- see Wickenden (1975) -- and employee stock option plans (ESOP). Since the latter are sometimes regarded as a form of industrial democracy, some references are cross-referenced to Section 6I.

3B -- Benefits: qualitative aspects of non-pecuniary benefits of the employment contract, collective agreement, and/or labour legislation

The final aspect of the employment package is benefits. The works listed here are involved with specific non-pecuniary benefits of the employment context, collective agreement and labour legislation. Benefits such as job security, medical plans and cost-of-living provisions are discussed. A major contribution to the body of knowledge on this subject is the Ontario Ministry of Labour's Bargaining Information Series which is heavily cited in this section.

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4. Sociopsychological Factors and Relationships

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4. Sociopsychological Factors and Relationships

This section is concerned with the perceptions, feelings, and responses of individuals in the work environment -- job satisfaction and attitudes towards work, for example -- and the factors which shape them. In contrast to the underlying assumptions of the Scientific Management School (that efficiency should be promoted through the fractionation of work into the simplest possible tasks to be performed by essentially brutish workers who perceive work as purely instrumental) later analysts have emphasized psychic rather than monetary rewards.

4H -- Specific studies of Herzberg's two-factor theory

The contrast between the monetary and the psychological returns from work is the basic theme of a large number of studies. Particularly influential, however, has been Frederick Herzberg's motivation-hygiene theory. The essence of this theory is the contention that satisfaction and dissatisfaction with a job are quite distinct experiences, not just the opposite ends of a common scale. The important corollary of this proposition is that there exists a set of factors which relate to dissatisfaction and a quite separate set which relate to satisfaction. To expand slightly, the *absence* of certain characteristics of the job "context", like good company policies, good pay, good working conditions, and good supervisors, can be a source of *dissatisfaction*; but the mere *presence* of such contextual factors

is not sufficient to ensure positive job satisfaction. The latter is held to emanate from factors relating to the job "context": achievement and its recognition, interesting work, and opportunities for advancement. The "dissatisfiers", being of an environmental and preventative nature, are called "hygiene" factors by Herzberg, while the "satisfiers" are known as "motivators". Herzberg's 1965 article "The New Industrial Psychology" provides a good overview of his basic theory, while those by Grigaliunas and Wiener (1974) and by Wall and Stephenson (1970) furnish useful critical surveys of the literature relating to the two-factor theory.

4G -- General: Job satisfaction, motivation, productivity, work attitudes

Another particularly important landmark in the emphasis upon psychological returns to employment was the hypothesis of a hierarchy of human needs ascending from the physiological needs through the safety needs, the belongingness or love needs, and the esteem needs to the need for self-actualization. It is asserted that individuals concentrate their efforts on the sequential satisfaction of need levels. Frustration of efforts to fulfil a need or set of needs may lead to dissatisfaction, alienation, etc. Many social psychologists emphasize the relevance of the higher-order needs in the world of work, arguing that the need for esteem and self-actualization imply the requirement for a certain set of characteristics of work.

Such considerations, along with the recognition of the unfortunate consequences of the application of the principles of specialization or "work simplification" -- monotony, boredom, isolation, frustration, alienation -- have led increasingly to a consideration of the impact of a host of work-related factors upon job satisfaction and work attitudes. For example, Hackman and Lawler (1971) consider the types of job characteristics which might be expected to foster feelings of accomplishment and personal growth. Thus the general concepts of autonomous work-groups, job enlargement, and job enrichment are discussed, along with such specific factors as task variety and identity and information feedback. Cummings and Berger (1976) look at the impact upon work attitudes, motivation, and performance of a number of organizational variables such as size of organization, the extent to which its structure is tall or flat, centralized or decentralized, and the position of the individual in the hierarchy.

An important assumption of much of the work included in this section concerns the existence of a relationship among such factors as job satisfaction, motivation, and productivity: indeed, a linear causal chain seems a reasonable a priori expectation. The modification of such relations by (for example) reward systems and their perception by the individual, personal characteristics, etc., is the subject of a comprehensive review article by Schwab and Cummings (1970). The question of the direction of the relationships -- and particularly the suggestion of circularity -- is treated by Macarov (1976).

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5. Manifestations of Workplace Malaise

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5. Manifestations of Workplace Malaise

A poor working environment affects workers in several different ways, but the effects may be classified as either active or passive. First, when employees experience dissatisfaction with work, its context (e.g., poor pay) and/or its content (e.g., little variety), they may *actively* register their discontent by exhibiting certain forms of withdrawal behaviour, either en masse, by striking, or individually, by missing work, quitting work, by stealing, or by sabotage. However, bad working conditions may also lead to relatively passive manifestations that are not voluntary action by the employees: disease and injury. Articles involved with these latter symptoms of workplace malaise will be presented first.

In passing, a couple of points should be made. Attempts made to measure hours lost as a result of each of the above-mentioned manifestations are included below and *not* in section 3T. And articles proposing cures for these woes are generally listed under Strategies, in Section 6.

5H -- Occupational health and safety; alcoholism; drug abuse; mental illness

When inadequate safeguards exist at work, employees (and ultimately the employers) may suffer the consequences in one of two ways. If equipment or plant is faulty, or if a worker has not been properly trained, then the result may be accident and injury. Reports to the Labour Safety Council of Ontario by Don F. Jones (1973) point out certain aspects of occupational safety, as does the work of Surry (1974). The other "health-related" symptom is more subtle, and insidious.

It is occupational disease, of which three distinct forms may be identified as follows: (1) respiratory and coronary disease resulting from a workplace poorly ventilated and a job too strenuous or worrying -- see Evan (1974) and Friis (1976); (2) alcoholism and drug abuse (perhaps leading to absenteeism), resulting from alienation -- see Wulf (1973) and Rogers and Colbert (1975); (3) mental illness, probably also stemming from the above conditions (Hellon and Robertson's work (1975) is a good example). Some articles describe the problem, some point out the causes while others attempt to put a dollar value on its effects.

5A -- Absenteeism

The first individual form of protest that a dissatisfied worker may resort to is absenteeism -- the loss of work time by temporary and voluntary withdrawal of services. It comes in many forms, namely tardiness, extended breaks and calling in sick when not ill at all. Behrend and Pocock (1976) is a good example of the literature that follows. Included below are studies of the absenteeism itself, its causes and its effects, including financial loss, to the firm and ultimately to society at large.

5T -- Turnover, quit-rates

A permanent form of withdrawal behaviour stemming from poor working environment, is turnover. The phenomenon, because it is a costly problem, is extensively dealt with in the QWL literature, and from several different viewpoints. Some studies, like those by Bowey (1969), and Early and Armknecht (1973), merely attempt to measure turnover, using

such calculations as turnover rates, quit rates, mobility indices and survivor functions; others like B. O. Pettman (1973), Ross and Zander (1957), and M. Bucklow (1950) attempt to shed some light on its causes; and still others discern and identify inter-sex variations, such as Barnes and Jones (1974), and interindustry variations, such as Burton and Parker (1969).

5C -- Counterproductive behaviour: sabotage, pilfering

When employees steal company property and interfere with company operations, they are guilty of offences punishable by law. While these incidents of theft and sabotage may be the acts of a natural criminal worker, they may also be manifestations of a workplace that has sowed the seeds of discontent against itself. In other words, and continuing the analogy, an unhappy worker dissatisfied with his or her job may be moved to undertake destructive behaviour in the employing enterprise.

5S -- Strikes, disputes

If individual workers are dissatisfied, the rather spontaneous behaviour of absenteeism, turnover and sabotage may result. However, group action may also be taken as a form of protest. That is, they may decide to strike -- to withdraw services en masse to back up various job context and job content demands. While they are an obvious and measurable indicator of worker dissatisfaction, strikes are costly to the parties involved and to society at large. Accordingly, most of the references in this subsection are concerned with the causes of strikes -- see Finn (1973) -- and with measures of their cost -- see Fisher (1973).

5G -- General: alienation, unrest

The last symptom dealt with is alienation. Being "turned off" by one's job is a problem considered by many authors in this section to be increasingly significant. In fact, feelings of inadequacy and irrelevancy and lack of purpose are often just the stepping stones to any or all of the previously mentioned problems. The concern of the U.S. Congress with such issues in 1972, underlines their urgency. Also in the section are included studies that discuss a variety of symptoms of workplace malaise, such as the article by Kerr, Koppelman and Sullivan (1951).

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6. Strategies of Work Humanization

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6. Strategies of Work Humanization

In previous sections we have addressed questions of definition, description and diagnosis of the QWL field. The references in the present section have to do with treatment. That is, they are concerned with the methods of treating some of the work-related ills which have been identified. The rather general term which is used to describe such methods is "work humanization". While it seems fair to say that while in a field as new, as fundamental to human welfare, and as interdisciplinary as QWL, widely differing viewpoints and interests are inevitably represented, broad consensus on definition and description may grudgingly be gained, the question of treatment is contentious in the extreme. For it is in this area in particular that differences in culture, in ideology, and in technology colour in marked degree the approaches of the interested parties.

6S -- Sociotechnical design: job redesign, enrichment, rotation, enlargement

Mention has already been made of the Scientific Management approach to work organization which stems from the work of F. W. Taylor. More recent analysis has pointed to the mind-numbing consequences of the extreme application of such routinization of tasks. This, along with the emphasis on the psychological aspects of work described in Section 4, and a growing awareness of the relationships among such variables as satisfaction, motivation and productivity, has given rise to an investigation of the circumstances in which the "higher order needs" of people in the workplace might be promoted.

The first of these concerns the way in which work is organized -- in particular, the design of jobs. The fundamental proposition underlying what is known as "socio-technical design" is that technology -- including the amounts and types of capital equipment, its layout and manning, the specification of jobs and tasks, and the lines of reporting, responsibility and communication -- need not be regarded as an immutable constant. Rather, the mechanistic view of labour input as being subservient to the pace, the regimen, of complementary factors of production is reversed. If the needs of the individual are accorded at least equal weight in technological and organizational design, it is argued, then the objectives of the individual, the organization, and society at large, may simultaneously be served.

In many recent experiments, therefore, the process of increasing specialization of tasks in the Chaplinesque industrialized corporation has been reversed. Numerous case studies (see Davis and Cherns, Volume II, 1975) document efforts to redesign work roles by means of "job enlargement" and "job enrichment" to afford greater opportunities for the exercise of a variety of skills, for control over the work flow, for identification with the product of one's labour, for the application of decision-making, and the assumption of responsibility.

It should be emphasized, in conclusion, that tradition dies hard and that time-honoured views of the

capital-labour relationship in the production process change slowly and painfully. While at first glance a commonality of interest in work humanization may be apparent for workers, employers, and governments alike, initiatives for work redesign may be viewed in practice with considerable suspicion. Finally, it seems appropriate to emphasize the dangers inherent in essaying the general application of experiments which have proven successful in particular circumstances: success depends, ultimately, on the accurate diagnosis of *special* circumstances and the sensitive application of customized therapy.

6I -- Industrial democracy, worker participation, ESOP, etc.

The other major strategy of work humanization concerns not so much the technological aspects of work organization as the process of decision-making in the world of work. Sometimes known as "worker participation in management decision-making", industrial democracy is concerned with the opportunities afforded to labour to share in the decisions which are taken concerning the process of production -- decisions which ultimately have far-reaching implications for the lives of capitalists, rentiers, managers, and workers alike.

Considerable attention has been paid to the complex variety of forms in which the labour input into the decision-making process is manifested in practice -- from the conventional adversary approach to collective

bargaining which is practised in North America to the system of worker-owned enterprises which exists, for example, in Yugoslavia. The apparent success of certain West European systems of worker-management "co-determination" -- including such institutions as works councils and worker representation on boards of directors -- has been analysed with interest by American and Canadian observers of late. This interest is sparked, of course, by suggestions concerning the costs of North American-style industrial relations.

The current debate is enormously complex, and increasingly acrimonious. One attempt to set out the dimensions of the subject, and to provide as comprehensive as possible a background to this subject, is contained in Keith Newton, *The Theory and Practice of Industrial Democracy: A Canadian Perspective*, Economic Council of Canada, Discussion Paper No. 94, August 1977, which we warmly recommend to the interested reader.

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7. Measurement and Methodology

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7. Measurement and Methodology

Articles presenting innovative approaches to measuring various aspects of QWL, and QWL overall, comprise this section of the bibliography. Since much of QWL is essentially qualitative in nature, efforts at quantification are wide-ranging. A number of works, among which the article by Macy and Mervis (1976) affords a good example, are concerned with providing a methodological framework from which empirical QWL investigation may commence.

Such techniques as path analysis -- see Gow, J. S. *et al.* (1974); indexing -- see Pencavel (1974); "social indicator analysis"-- see Horn (1976), and surveys -- see Quinn and Shepard (1974), are among the many methods employed in the references that follow.

As far as the subject matter itself is concerned, the reader will discover the most popular topic appears to be labour turnover -- perhaps in part because of the enormous costs it imposes on society. Among the authors measuring and costing turnover are Bowey (1969), Gow (1974), Lane and Andrew (1955), McIlveen (1975), Price (1976) and van der Merwe (1971). All are cross-classified with Section 5T. Another important subject area is the determinants of the length of the work week. Hameed (1975) and Owen (1976) are prime illustrations; they are also listed of course in 3^m. A further concern is the Herzberg two-factor theory, perhaps because it has revolutionized thinking on the whole idea of motivating workers. Accordingly, there have been many attempts to empirically test this hypothesis: see Hinton (1968) and Hulin and Smith (1967). Finally,

mention should be made of those general papers measuring the broad areas of quality of worklife, employment, job satisfaction and working conditions. Boisvert (1977) and Portigal (1976) are two of a host of authors dealing with these topics.

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Postscript

Bibliographies are always incomplete. Ours is no exception. Since the final organization of the sections and subsections, the collating and the cross-classification, a number of new and useful references have come to our attention. They appear below in order of classification.

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What's QWL?

Definition, notes

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