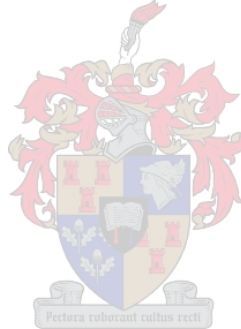# A phenomenological study into the experiences of retrenchment implementers

Birgit Westermann-Winter

Thesis presented in partial fulfilment of the requirements for the degree of Master of Arts at the University of Stellenbosch
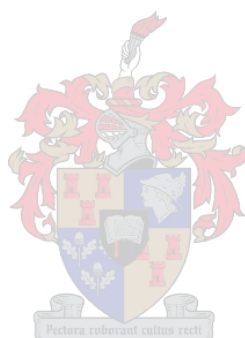
Supervisor
Mr G Cillié
March 2007

DECLARATION

I, the undersigned, hereby declare that the work contained in this assignment is my own original work and that I have not previously in its entirety or in part submitted it at any university for a degree.

Signature:…………………………………………………

Date:…………………………………………………….

ACKNOWLEDGEMENTS

I would like to thank those who have assisted me during the research.

First, I would like to acknowledge my Maker. I know and believe that through Him all things are possible.

My supervisor, Mr Gawie Cillié, for his supervision, academic guidance, professional criticism and incredible support during the research process and writing up of this study.

Thank you to the members of the academic community for their academic guidance in ensuring the final copy of this study meets the necessary requirements. Your time and clear feedback is so appreciated.

To the fifteen participants in this study, for agreeing to participate and having the courage to share their experiences with me.

My appreciation to my mentor and business partner, Niël Steinmann for his unwavering faith in my abilities. Thank you for always making time for me to "test an idea" with you. I have been blessed by your friendship and have grown in so many ways under your guidance.

To all my colleagues, peers, friends and extended family for their interest and encouragement. Thank you for taking the time to enquire after the progress of this study. I look forward to investing a substantially larger amount of time in growing our relationships.

My gratitude to my parents, Manfred and Brigitte Westermann, who have always encouraged and supported me to be all that I can be. To my father, thank you for always believing in me and holding my hand in your gentle and loving way. You have had a profound role in shaping my character. To his wife, Brigitte, thank you for your emotional support and all the wonderful meals you prepared for us as part of keeping me fit and proper for this task.

My appreciation also extends to my dear mother, Leoni McLaughlin and her husband, Brian McLaughlin. Thank you for all the years you believed in my ability and God-given talents. Thank you also for loving and nurturing me and teaching me the value of pausing to celebrate success. You have both played a significant role in exposing me to wonderful opportunities and experiences, all of which have contributed to the richness that life has to offer.

To my parents-in-law, Eric and Wilma Winter, thank you too for believing in my dreams. Even though you are far away from me, your caring interest in this research and my wellbeing is so appreciated.

To my younger brother, Björn Westermann, thank you for encouraging me to achieve my ambitions and dreams and for sharing in my joy when I have realised them. You have taught me to remember the simple pleasures in life and I miss your company very much.

Finally, to Jako, my husband, for his unwavering moral support, love and encouragement throughout this research study. Thank you for your incredible strength and unbelievable patience. You are part of the reason that I have progressed so far successfully. Thank you for also teaching me to remain resilient in the face of challenges. I am richly blessed to have you in my life.
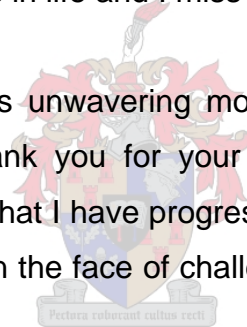
OPSOMMING

Toenemende globalisering en mededinging hou implikasies in vir vernuwing en verandering en toenemende kostebesparings, deur middel van personeelverminderings, is deel van die soeke na 'n mededingende voordeel en volhoubaarheid. Personeelvermindering blyk geen uitsondering in die Suid-Afrikaanse verband te wees nie.

Die studie het die ervarings van dié wat getaak is om personeelverminderings uit te voer, die sogenaamde implementeerders, ondersoek. Alhoewel implementeerders 'n sleutelrol vervul in voordurende organisatoriese sukses en winsgewendheid na die personeelvermindering, is beperkte internasionale en nasionale navorsing oor hulle ervarings beskikbaar.

Kwalitatiewe data is ingesamel met behulp van onderhoudvoering met die implementeerders van personeelverminderings. Inhoudsanalise het drie sentrale temas geidentifiseer: implementeerders se ervarings ten opsigte van die prosedures vervat in artikels 189 en 189A van die Wet op Arbeidsverhoudinge, 66 van 1995 (soos gewysig); implementeerders se persoonlike ervarings tydens die uitvoering van die personeelverminderings asook organisatoriese en persoonlike bemagtigingstrategieë om hulle by te staan in hulle voorbereiding vir die implementering van die personeelverminderings.

Die resultate toon gemengde response in terme van die voldoening aan toepaslike wetgewende vereistes. Ten opsigte van hulle persoonlike ervarings, dui resultate daarop dat alhoewel sommige implementeerders daarin geslaag het om aan te pas by hulle bestuursfunksie van personeelverminderings, het ander ongemak met hierdie rol ervaar. Hierdie implementeerders het onder andere aan die volgende gely: ervarings van skuld en 'n gevoel van verantwoordelikheid, rolkonflik, roloorlading, afname in emosionele welstand, 'n gevoel van isolasie, negatiewe selfbeeld en werksonsekerheid. In die meeste gevalle het implementeerders beperkte emosionele ondersteuning en hulp van hulle organisasies ontvang ter voorbereiding vir die personeelverminderings-onderhoud. Hierdie resultate ondersteun die beperkte nie-Suid Afrikaanse navorsing.

Die resultate van die studie het ook bygedra tot insig in die wyses waarop implementeerders persoonlik voorbereid is vir hulle rolle asook wyses waarop organisasies hulle emosioneel kan ondersteun in hierdie taak.

ABSTRACT

Increased globalisation and competition have implications for organisational renewal and change and increasingly cost cutting, by retrenching employees, is part of the search for competitive advantage and sustainability. Within the South African context, retrenchments are no exception. The study explored the experiences of those who are tasked with the role of implementing the retrenchment, the so-called retrenchment implementers. Despite implementers being key to ensuring organisational success and profitability in the aftermath of retrenchment, research on their experiences is limited not only internationally, but also locally.

The study was conducted amongst participants employed at various South African organisations. Qualitative data was obtained via semi-structured interviews with the implementers of retrenchments. Following content analysis, three key themes emerged: implementers' experiences of procedural aspects as per s189 and s189A of the Labour Relations Act 66, of 1995 (as amended); implementers' personal experiences of performing the retrenchment act and organisational and personal enabling strategies to assist with preparing implementers for the retrenchment task.

Results indicate mixed responses in terms of complying with the relevant legislation. Insofar as their personal experiences are concerned, results indicate that while some implementers had found ways to adjust to their managerial function of implementing retrenchments, others experienced discomfort with their role, suffering from amongst others guilt and feelings of responsibility, role conflict, role overload, decreased emotional well being, a sense of isolation, negative self-perceptions and feelings of job insecurity. In the majority of cases, implementers experienced limited organisational emotional support and assistance in dealing with their emotions during the retrenchment conversation. These results support the limited non-South African literature.

The results from the present study also added insight into the ways in which implementers are personally prepared for their role as well as ways in which organisations can assist them emotionally for their task.

TABLE OF CONTENTS

CHAPTER 6: DISCUSSION OF RESEARCH RESULTS

CHAPTER 7: RECOMMENDATIONS AND CONCLUSION

LIST OF TABLES

LIST OF FIGURES

CHAPTER 1: INTRODUCTION, RESEARCH OBJECTIVES AND OVERVIEW OF THE STUDY

1.1. Background

The ever-increasing international reality is that retrenchments as a global phenomenon has become a daily fact of life (Marks & DeMeuse, 2002; Morar, 2004; Sloan, 1996; Stein, 1996; Wright & Barling, 1998), as well as being an increasingly common occurrence in the South African context (Craven, 2003; Hlekiso, 2004; Hooper-Box, 2002; Morar, 2004). Within the South African context, the researcher was curious to investigate the experiences of those managers tasked with having to retrench others as reported by international researchers (Folger & Skarlicki, 1998; Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2005, 2006; Wright & Barling, 1998) and to use these studies as a background against which to compare the experiences of the South African implementer.

Despite their crucial role in retrenchment, researchers, retrenchment models and best practice guidelines have largely ignored those who are tasked with delivering the retrenchment message, the implementer. According to international research little is known about the experiences and emotional challenges they are faced with when implementing the retrenchment, how they cope with these challenges and what organisations can do to support them. The study uncovered a limited number of international investigations in this regard (Folger & Skarlicki, 1998; Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2005, 2006; Wright & Barling, 1998). Locally, no dedicated investigation by South African researchers in this regard was located.

The potential impact of retrenchment appears to have been recognised in that a number of studies have examined the experiences of the victims and survivors of retrenchment. The victims refer to those who are separated from the organisation; the survivors are those remaining behind (Brockner,

Konovsky, Cooper-Schneider, Folger, Martin & Bies, 1994). While retrenchment may involve some positive experiences, it has been found that in the majority of research the negative experiences translate into experiences of symptoms of the "survivor syndrome" in the case of survivors. This includes amongst others lowered work attitudes, work behaviours, work performance, increased job insecurity, feelings of organisational unfairness, distrust and betrayal, depression, emotional stress, work overload and fatigue, and reduced risk-taking (Appelbaum, Leblanc & Shapiro, 1998; Brockner, 1992; Brockner, Grover, Reed & Dewitt, 1992; Brockner, Grover, Reed, Dewitt & O'Malley, 1987; Burke & Nelson, 1998, cited in Makawatsakul & Kleiner, 2003; Cameron, 1994a; Cascio, 1993; Cooper, 1994; Doherty & Horsted, 1995; Dupuis, Boucher & Clavel, 1996; Greenhalgh, 1982; Roskies & Guering, 1990; Kinnie, Hutchinson & Purcell, 1997; Newell & Dopson, 1996; Noer, 1993; O'Neill & Lenn, 1995; Quin Mills, 1996; Vollman & Brazas, 1993) and social, psychological and medical consequences of unemployment in the case of the victims (Fryer & Payne, 1986, cited in Wright & Barling, 1998).

Moreover organisations historically would seem to rely on following legal procedures when implementing retrenchments (I-Net Bridge, 2005; Israelstam, 2002; Mishra, Spreitzer & Mishra, 1998; Roskam, 2002; South African Press Association (Sapa), 2005; Xaba, 2003), implying a legalistic approach and hence a lack of attention to the personal challenges implementers face in dealing with and coming to terms with their implementer role. While it was not the intention of the present study to focus on the legal procedures followed when implementing retrenchments, some background to s189 and s189A of the Labour Relations Act 66, of 1995 (as amended), will be provided as it forms part of South African Labour Legislation (Thompson & Benjamin, 2006).

1.2. Research Problem and Objective

Molinsky and Margolis (2005) suggest that in order to produce a beneficial business result, managers must sometimes cause harm to another human being by for example retrenching them. In their study they explore the inherent challenges such a task poses for those who must perform them. In a

later study Molinsky and Margolis (2006) confirm that like the victims and survivors of retrenchments, the implementers of retrenchments too are negatively affected by the retrenchment act, experiencing many emotional challenges when implementing the retrenchment.

Wright and Barling (1998) report that retrenching others is professionally demanding and leads to amongst others role overload, a search for meaning, social and organisational isolation, a decline in personal wellbeing and decreased family functioning. Stein (1996, p.7) argues that retrenchments are in fact "everybody's business". Although retrenchment is undertaken in the name of rational planning, objectivity and empirical businesslike truth (e.g. the bottom line), it is riddled with irrational motivation and with long-lived and unanticipated emotional consequences for leadership, managers and workforce alike, the most manifest being dread of the future, the retreat from loyalty to cynicism and shattered morale.

Wright and Barling's (1998) research suggests that implementers are worthy of empathetic scrutiny because of the negative effects on both their wellbeing and functioning within the organisation, which manifest as a result of implementing the retrenchment.
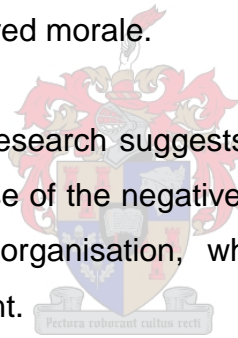
The research problem relates to investigating the experiences of South African implementers of retrenchment, the objective being to explore what these experiences would be in the South African context and:

- To investigate how South African implementer experiences compare with their colleagues internationally.
- To investigate how implementers experience retrenchment conversations.
- To investigate how organisations can assist to prepare implementers for the emotional challenges they would face in implementing retrenchments.
- To investigate types of personal coping strategies implementers use to manage their emotions and resulting anxiety they experience so that they stay at tolerable levels of intensity when implementing retrenchments.
- While it is not an express aim of the present study, it is anticipated that the resulting outcomes of the implementers' emotional experiences will prompt

others to develop guidelines for providing emotional assistance as part of preparing implementers for their role. This could form part of a larger all-encompassing organisational retrenchment plan.

This research is therefore an exploratory study which investigates the experiences of South African managers tasked with implementing the retrenchment, in other words the experiences of those tasked with breaking the bad news to the affected retrenchment victim. Attention is therefore focused on their overall experiences as implementers and the impact of these experiences on their emotions and consequently on their behaviour, that is executing the task and their ability to handle it with interpersonal sensitivity.

This study employs a qualitative investigation that attempts to uncover a rich and holistic understanding of the life-world of the implementers tasked with implementing the retrenchment.

1.3. Study Outline

The present chapter outlined the context of the research, the research problem and the main objective of the study. Chapter 2 and Chapter 3 provide a review of the salient literature that illuminates work which has influenced this research and which justifies the need for extending current research. Chapter 4 details the methodology employed in the study, which is located within the qualitative framework. The emergent results are presented in Chapter 5. Chapter 6 contains a detailed discussion of the results of the qualitative data analysis. Chapter 7 describes the limitations posed by the study, recommendations for future research in the field and a final conclusion.

It is anticipated that the findings emanating from the study may serve to provide employers with insight into implementer experiences of having to implement the retrenchment and suggestions of how organisations can assist the implementers of retrenchment by way of role preparation, emotional support and psychological aftercare.

CHAPTER 2: RETRENCHMENT - AN OVERVIEW

2.1. Introduction

This chapter provides an overview of retrenchment as an increasing phenomenon in the world of work today and aims to provide a general overview of, inter alia, a discussion of retrenchment terminology, a brief exposé on the extent of retrenchments locally and internationally, rationale offered by business leaders for retrenchment, implications of retrenchment for the traditional employment contract and the accompanying psychological contract, retrenchment outcomes, issues of fairness and justice as applied to experiences of retrenchments, the legal position in South Africa and the impact of retrenchment on the stakeholders affected by retrenchment.

2.2. Terminology

The reasons for retrenchment are normally described by referring to economic, technological, structural or similar reasons (Thompson & Benjamin, 2006). Many of the terms used, such as "redundancy" and retrenchment are terms of art which are not statutorily defined and about which there is often considerable confusion.

Redundancy can be described in terms of closing down a business altogether or the closing down of a business in a particular place or the elimination of a particular job. Retrenchment can be described as the situation in which the employer terminates employees' employment as they have become superfluous due to, for example, an economic downturn (Beaumont, 1991).

A distinction can therefore be drawn between redundancy as a state or condition of superfluity on the one hand and retrenchment as the act of reducing redundant staff. In terms of this distinction, redundancy is regarded as the cause and retrenchment the effect. For the purposes of this study, the term retrenchment will be used throughout.

The following terms are often used interchangeably with retrenchment, that is redundancy, resizing, downsizing, being "pink-slipped", rightsizing,

restructuring and re-engineering (Kinnie, Hutchinson & Purcell, 1998; Thornhill & Saunders, 1998).

While each term may have its own connotation, they do share a common meaning, which is suggestive of a deliberate decision to reduce the workforce that is intended to improve organisational performance (Kozlowski, Chao, Smith & Hedlund, 1993, cited in Makawatsakul & Kleiner, 2003, p. 52). This includes reductions in the form of transfers, voluntary retrenchments, layoffs, natural attrition, induced redeployment, involuntary redeployment and early retirement (Morar, 2004; Kinnie, Hutchinson & Purcell, 1998; Thornhill & Saunders, 1998).

The retrenchment process affects a variety of stakeholders. These stakeholders are the retrenching organisation, the victims, the survivors and the implementers or persons responsible for the implementation act.

Authors refer to the retrenching organisation by virtue of the fact that common patterns of change occur in the work environment during retrenchment (Cascio, 1993; Dougherty & Bowman, 1995; Noer, 1993). The victims refer to those who are separated from the organisation, the survivors are those remaining behind (Brockner, Konovsky, Cooper-Schneider, Folger, Martin & Bies, 1994) and those who are responsible for the implementation of retrenchment are referred to as the implementers (Noronha & D'Cruz, 2006). These stakeholders will therefore be referred to as such throughout and explained elsewhere in the study. In the meanwhile, what ensues is a discussion of the context within which the stakeholders experience retrenchment.

2.3. The Extent of Retrenchments

In today's corporate world retrenchment has become a fact of life, representing one of the most challenging tasks that business executives can face because of the human costs involved. As employee costs can exceed 40 percent of an organisation's budget, retrenchment is often used as a necessary means of cutting costs to remain profitable during difficult times

(Molinsky & Margolis, 2006). Companies feel compelled to retrench because being "lean and mean" (Leung & Chang, 2002) is believed to strengthen competitiveness (Sloan, 1996).

To outline the extent of retrenchment in the modern corporate world, international and local figures are presented. Corporate America has experienced a host of employment losses. During 1990, McDonnell-Douglas retrenched 17 000 employees, while in 1991, General Motors' downsizing led to the retrenchment of 74 000 employees. By 1993, retrenchments in large organisations had grown in frequency and size: IBM retrenched 60 000 employees; Sears, 50 0000; Philip Morris, 14 0000, and Boeing, 28 000 employees. In 1994, Digital Equipment retrenched 20 000 employees, Delta Airlines, 15 0000 and GTE, 17 000 employees. 1995 saw the Chemical-Chase Manhattan merger result in 12 000 employees losing their jobs and in 1996, AT&T retrenched 40 000 employees over a 3 year period, while Petrocan declared that they would be trimming their workforce by 11 percent (Sloan, 1996; Wright & Barling, 1998).

The prevalence of retrenchments on the South African business scene is no exception. The statistical evidence of the extent of retrenchments in South Africa is derived from various sources and while it is by no means a complete picture of the actual total number of retrenchments in South Africa, it does serve to provide a sense of the extent of retrenchments in South Africa. Recent research (Hooper-Box, 2002), reveals that since 1994, over 500 000 jobs have been lost across all economic sectors due to retrenchment, with one of the largest contributors to this figure being the public sector, responsible for 145 000 employees losing their jobs over the period 1994-1999 (Bhorat, 2000, cited in Morar, 2004). A recent study by Hlekiso (2004) showed that the South African labour market in the non-agricultural subsectors experienced net job losses during the period 1980-2001. Hlekiso's data sources were derived from the Industrial Policy Strategies (TIPS) series for subsectors. The results of this research is summarised in Table 1 below.

Table 1 Selected subsectors with the highest employment losses

Sectors and subsectors	Percentage change between 1980/1990 and 1991/2001*	Change in absolute terms between 1980/1990 and 1991/2001
Private services	-4	
Transport and storage.............	-39	-154 758
Water supply...........................	-16	-1 661
Catering and accommodation services	-15	-39 551
Mining	-26	
Gold and uranium ore..............	-35	-180 501
Coal..	-35	-32 150
Manufacturing........................	-4	
Other transport equipment	-45	-11 100
Basic iron and steel	-39	-35 401
Tobacco...................................	-36	-1 657
Textiles...................................	-34	-34 884
Basic non-ferrous metals	-34	-8 664
Footwear	-28	-9 033
Non-metallic minerals	-27	-21 328
Machinery and equipment	-22	-19 490
Coke and refined petroleum products	-21	-4 863
Electricity, gas and steam	-17	-13 691
Metal products excluding machinery................................	-16	-21 462
Leather and leather products	-14	-1 445
Rubber products	-13	-2 430
Motor vehicles, parts and accessories..............................	-13	-11 890
Construction	-24	
Building construction	-32	-83 557

* Calculated as a percentage change between the average values of 1980/1990 and 1991/2001, respectively.

(Hlekiso, 2004, p. 4)

Table 1 shows that the gold and uranium ore mining subsector suffered the most, having significant employment losses of some 180 501 employees or 35 per cent of total mining employment. In this particular industry, these employment losses were attributed to changing labour patterns that favoured fewer but better skilled employees (McCord & Bhorat, 2003, cited in Hlekiso, 2004, p. 4). Hlekiso (2004) argued that the data showed that formal non-agricultural employment in South Africa during the period of investigation had followed typical stages of developing and industrialising economies characterised by declining primary and secondary sectors and a growing tertiary sector, which is an increasingly global phenomenon. He furthermore argued that one of the challenges facing South Africa is to balance job creation with the level of capital intensity in the economy.

Another example of retrenchments in South Africa is captured in a joint statement issued by COSATU, SACTWU AND CEPPAWAWU on job losses in the South African plastic bag, clothing, textile and leather industries during the period 1 January and 30 June 2003, where approximately 6 000 jobs were lost in the industry. This is in addition to the loss of at least 17 000 jobs during 2001 and 2002. The result is increased poverty and hardships for retrenched workers (Craven, 2003).

The following section focuses on the causes of retrenchment.

2.4. Causes of Retrenchment

According to Modise (2002), the South African Reserve Bank's Quarterly Bulletin of March 2001 attributed examples of high retrenchment in South Africa as due to restructuring by companies, a preference for capital intensive over labour-intensive production processes, the introduction of new technology, the economic shift from primary and secondary sectors towards service sectors and the rightsizing of the private sector.

Marks and DeMeuse (2002) advocate that globalisation, deregulation and denationalisation, technological change, the bursting of the technological bubble, the slowing economy, increasing costs and mergers and acquisitions contributed to the increasing international phenomenon of retrenchments.

Those in favour of retrenchment argue that the several benefits compel its continued use. These include the need to cut overhead costs, a decline in bureaucracy and layers, quicker decisionmaking, smoother communication, greater entrepreneurship, increase in profitability, global benchmarking, revolutionary transformations in informational and communication technologies and improving organisational competitiveness in an increasingly global economy (Morar, 2004; Noronha & D'Cruz, 2006; Stein, 1996; Wright & Barling, 1998). Given that most people have spent most of their lives in some form of formal employment, it is necessary to explore what the increasing occurrence of retrenchments represents for the traditional employment contract in the ensuing section.

2.5. Retrenchment and the Employment Contract

Kets de Vries & Balazs (1997) surmise that for all of those affected by retrenchment, the single most important issue associated herewith is the breach of the "psychological or implied contract" as part of the employment contract. An employment contract is defined as an agreement between an employee and employer that specifies the terms of employment (Glosscoe, 2005). Within this employment contract is the traditionally "implied" contract between employers and employees at the onset of employment which is defined as being the implicit or unspoken and unwritten "psychological contract", where employees would work at their organisations for life and employers would "take care" of them until retirement (Baruch & Hind, 2000; Kets de Vries & Balazs, 1997; Noer, 1993). Given the reality of retrenchments, it follows then that the traditional or "old fashioned" employment contract and therefore models of career development have generally vanished from the workplace (Sandler, 2003). In his research, Schein (1971) employed the term "maternal organisation" to describe the almost parental care of traditional organisations that provided career development and advancement opportunities to members as they climbed the proverbial "corporate ladder". But in the light of retrenchments and the resulting delayering of organisations, it is vital that organisations now invest in creating awareness amongst employees of the newly developing career models that are not as linear as their forerunners (Arthur, Hall & Lawrence, 1989; Gottlieb & Conkling 1995; Krecker, 1994, cited in Fowke, 1998; Waterman, Waterman & Collard 1994).

In this context "wise" employers are moving away from the traditional paternalistic model towards a partnership model, where both employers and employees are helping each other obtain their goals and meeting their needs. An investigation by New York based consulting firm, Sirota, during 2003 found that the needs and goals of both employers and employees are much the same as they have always been (Sandler, 2003). The results of their investigation are summarised in Figure 1 below.
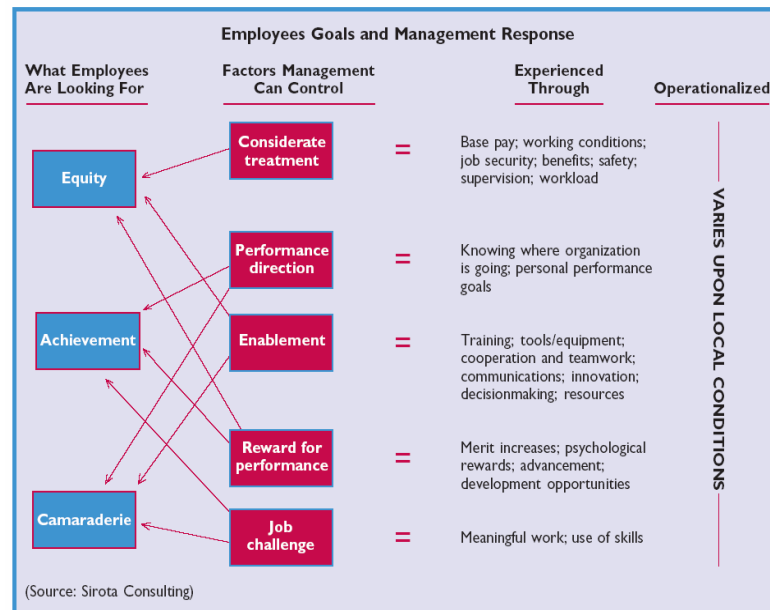
Figure. 1. Employee Goals and Management Response

(Sandler, 2003, p. 13)

According to the researchers at Sirota, what has changed, however, is how these goals and needs are being fulfilled and the success of goal achievement depended on how employers "revise" the "implied or psychological contract". They postulate that treating employees as partners is the alternative that can maintain the loyalty part of the traditional employment contract, as well as foster retention, productivity and growth. Partnership, therefore involved showing concern for employees' basic interests, a strong performance orientation, helping employees to perform, open and honest communication, including listening and responding to employees and sharing the financial gain generated by their performance, with employees. They conclude that this partnership relationship fosters mutual loyalty; thus being advantageous to both employers and employees in the longer term (Sandler, 2003).

This research is supported by Fowke (1998) who suggested that the new career is therefore driven by the individual's needs and values rather than by the organisation. The individual will reinvent it from time to time, as they become life-long consultants in their chosen vocations, not in their chosen

organisations. Various authors referred to this as the "internal" (Schein, 1996), "boundaryless" (Arthur, 1994) or new "protean" career of the twenty-first century (Fowke, 1998). Thornhill and Saunders (1997) also referred to this as a move away from the "relational" contract (involving the offer of employment security, training and promotion in return for employees' loyalty and trust) to the "transactional" contract (characterised by strict instrumentality where employee inputs are exchanged for compensation). It is therefore not surprising that these non-linear models are emerging at the same time as massive retrenchments worldwide, since they are partly a result of retrenchments (Gottlieb & Conkling, 1995).

Part of the answer to dealing with the phenomenon of retrenchment therefore lies in employability (Leung & Chang, 2002), which is the opportunity for the employee to take on board personal career ownership, allowing them to be better equipped to cope in terms of emotions and skills during times of change. For the organisation, it offers the chance to achieve more flexible and painless change and for the employee, the opportunity to generate more appropriate behaviours in response to change. If organisations, however, are to move to employability rather than employment they must invest in finding alternative ways to develop skills and retain and motivate employees (Kinnie, Hutchinson & Purcell, 1998; Noronha & D'Cruz, 2006). In this regard Fowke, (1998) continues to suggest that Human Resources Managers will find that the new career model may also necessitate new recruitment activities and staffing planning, breaks in succession plans, different approaches to training and development and increased use of employee assistance programs. In summary it would seem that understanding the new career model is crucial if the organisation is to take full advantage of the savings it hopes to achieve by retrenching employees.

Against the backdrop of the causes offered and the clearly increasing extent of retrenchments locally and internationally, the following section explores the literature on the successes and failures of retrenchments.

2.6. Retrenchment Outcomes

2.6.1. Reasons why Retrenchments Fail

Evans, Gunz and Jalland, (1996), suggested two major reasons for the failure of retrenchment. Firstly, it is usually not undertaken as part of a broader strategic repositioning of the organisation where, amongst others, work processes and altered business practices needed consideration (Appelbaum & Donia, 2001; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2006) rather than only focusing on perceived internal efficiency (Kets de Vries & Balazs, 1997; Noronha & D'Cruz, 2005; Sloan, 1996). The second major reason for failure is that, despite their best efforts, some organisations risked cutting "muscle instead of fat" and they ran the risk of losing key competencies. This is confirmed by Kets de Vries and Balazs (1997) who advocated that reducing head count caused organisations to lose human capital and organisational memory and to be left with unhappy and overworked employees who were tasked with responsibilities for which they were not necessarily trained.

Other authors furthermore indicated that retrenchment initiatives were often undertaken for the wrong reasons. Vollman and Brazas (1993, p. 21) suggested that retrenchments may not be an appropriate response, at least in isolation, to competitive problems resulting from "poor quality, lack of flexibility, misguided or obsolescent strategies, technological backwardness, slowness in rolling out new products, over diversification and/or a failure to capture synergies, inability to grasp and/or counter competitors strategies, ineffective marketing and the like".

Within the South African context, Roskam (2002, p. 66) investigated the restructuring mechanism that declares all jobs redundant and invites employees to apply for jobs on the new organisational structure. Employees who are not successful are retrenched. In his article he suggested that under the guise of restructuring and the retrenchment exercise, employers might dismiss employees that are, for example, perceived as performing poorly, have difficult personalities, have effective union representatives, have not fitted into the culture of the organisation, and a host of other reasons that may

have little to do with whether an employee should be retrenched or not. He continued to add that while this may be alluring for employers because not only has the employer solved its operational requirements but also managed to solve its issues relating to problem employees, they should be wary of this approach and employees should generally resist this idea. According to s189 (7) of the Labour Relations Act, 66 of 1995 (as amended), which relates to selection criteria, the employer needs to consult on selection criteria and if no criteria have been agreed on, then criteria needs to be fair and objective. The mechanism of selecting employees on the basis that they were unsuccessful in their application for new posts in the new organogram is often neither fair nor objective as is borne out in the following two cases, where judgement has been made against employers for procedural and substantive reasons. In this regard, the reader is referred to the private arbitration of Grieg v Afrox Limited (2001) 22 ILJ 2102 (ARB) and Makgabo & others v Premier Food Industries Limited (2000) 21 ILJ 2667 (LC) (Roskam, 2002).

According to Cameron, Freeman and Mishra (1991), failure to share the pain was another reason that retrenchments failed in meeting their objectives. Top management, for example, did not take a cut in their benefits together with those lower down the organisation, a view that was supported by Sloan (1996, p. 44), as is encapsulated by his statement "…and they don't even seem to feel bad about what they are doing…the people whose mistakes helped cause the problem often end up with fatter pay-checks and bigger stock options… by firing people from the lower ranks".

Cascio (1993) referred to the negative effects that changes in staffing had on human resources activities, where for example retrenched employees were replaced by consultants, a duplication of functions in strategic business units occurred and line managers required training if they were to carry out human resources tasks, which organisations found expensive. Some retrenched employees were often brought back into the organisation as external consultants or independent contractors.

Additionally, researchers found growing evidence to support that ignoring the impact on the surviving employees was another of the main reasons for long-term problems (Greenhalgh, 1982; Roskies & Guering, 1990). In some cases, retrenching organisations assisted the victims by, for example, providing outplacement facilities, career counselling, networking opportunities and early release schemes, but ignored those left behind (Kinnie, Hutchinson & Purcell, 1997). This is supported by a survey conducted by Doherty and Horsted (1995, p.27) of financial service organisations, which showed that although 79 per cent of the firms provided outplacement services for employees leaving, less than half gave support to those who remained. Instead of feeling relieved that their jobs were secure, those who survived were demoralised about their own future. There were also feelings of increased stress, scepticism, anger and bitterness. Although most participants (93 per cent) said there were formal strategies for retaining and motivating remaining staff, the majority tended to focus on rewards and training (mainly on job skills required for new work roles and team building efforts). Fewer than half (42 per cent) reported the implementation of succession planning or career management (44 per cent).

A plethora of other studies referred to the effects on the survivors as the "survivor syndrome", where symptoms of this included decreased morale, productivity and quality; increased distrust of management, stress and absenteeism; employees working shorter hours and initiating job searches (Appelbaum, Leblanc & Shapiro, 1998; Brockner, 1992; Brockner, DeWitt, Grover & Reed, 1990; Brockner, Grover, Reed & Dewitt, 1992; Cameron, 1994a, 1994b; Cascio, 1993; Dupuis, Boucher & Clavel, 1996). Burke and Nelson's, investigation (1998, cited in Makawatsakul & Kleiner, 2003, p. 54) showed that 61 percent reported decreased morale, 50 percent reported decreased company loyalty and 37 percent reported decreased job satisfaction. They proposed that employee morale and loyalty tended to be the first unintended casualties of retrenchments and that while high morale and loyalty are regarded as a critical asset of any company, retrenchments have the potential to threaten this seemingly intangible, yet critical asset.

In fact Cascio's (1993) study continued to show that following retrenchments, surviving employees become narrow-minded, self-absorbed and risk averse. In other words, employees became less flexible and over-dependent on traditional, well-known ways of doing things and creativity was inhibited.

Evidence of the symptoms of the "survivor syndrome" specifically in the remaining managers found that, following lengthy retrenchment programmes, these managers were demotivated; felt they were working longer hours; lacked information about their role and had reduced control (Newell & Dopson, 1996).

Survivors furthermore felt guilty that it was not them who were selected to go, feared losing their jobs, were unclear about responsibilities and management expectations, perceived their workload to be higher, and felt the "psychological contract" was threatened (Cascio, 1993). In an article on the decline and rise of IBM (in support of the aforementioned), Quinn Mills (1996) proposed, that IBM's failure in the 1980s and early 1990s was partly due to the breaking of an implied promise to provide job security, in an attempt to bail out its shareholders. As a result employees became disillusioned and less effective.
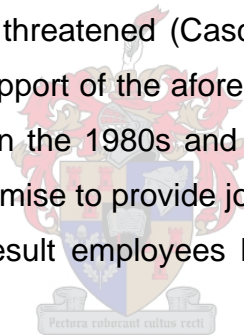
Furthermore feelings of "survivor envy" reduced employee commitment as illustrated by "he's got a special retirement package and a new job that pays better " (Vollman & Brazas, 1993, p.23).

Burke and Nelson's study (1998, cited in Makawatsakul & Kleiner, 2003, p. 54) supported by Brockner, Grover, Reed, Dewitt and O'Malley (1987) and Doherty and Horsted (1995), reported an interesting phenomenon of increased performance and productivity where some survivors were driven to work harder, having survived retrenchment, since they were concerned about their own job security. This is verified by a South African study on survivor work attitudes and work behaviours to the initial news of retrenchments, which revealed an increase in absenteeism, preoccupation, poor performance and unwillingness to cooperate. These attitudes were however short lived and

work attitudes and work behaviours to the news of their "survivor" status changed, with employees "working harder". The motives for investing in such behaviour were based on "fear" and the hope that investing in this behaviour would insulate them from future retrenchments (Morar, 2004, pp. 62-63). Cooper's study (1994) showed evidence that fear about future retrenchments also led to inappropriate behaviour in survivors who worked long hours simply to be seen at work, such employees being referred to as "presentees".

It would seem to be clear from the afore-mentioned that researchers proposed that the hidden costs of retrenchment are often underestimated, suggesting that it often tended to generate more problems than it solved and only rarely achieved its original objectives.

Notwithstanding this dichotomy, the research statistics and numbers of employees being retrenched seem to suggest that it has remained an attractive alternative for many organisations since it gives the impression that decisions are being made (Kets de Vries & Balazs, 1997) and actions are being taken (Sloan, 1996).

2.6.2. Reasons for Successful Retrenchment Implementation

From the latest research, it would appear that clarity on "why" an organisation decided to undergo change as well as the state of the company's organisational context (culture, trust and leadership) might have an important effect on the success of a retrenchment initiative. According to Bruton, Keels and Shook (1996) organisations that synthesized their "why" or retrenchment strategies with their particular situation or context and assessed their readiness for change, tended to have successful results. Several studies show that a firm's organisational context (Hupfeld, 1997; Leatt, Baker, Halverson & Aird, 1997) containing a strong, supportive culture and a high level of employee and organisational trust (Brousseau, Driver, Eneroth & Larson, 1996; Hodgetts, 1996; Peak, 1996) as well as a strong committed leadership combined with a clear organisational vision and mission statement (Appelbaum, Simpson & Shapiro, 1987; Chitwood, 1997; Hodgetts, 1996; Hupfeld, 1997; Leatt et al., 1997), would not only positively influence any

retrenchment plan but also help to ensure the long-term viability of that organisation (Hodgetts, 1996; Leatt et al., 1997).

Appelbaum, Close and Klasa (1999) added that organisations undergoing retrenchments who not only paid special attention to the victims by way of a termination plan, but also to the survivors by providing adequate survivor support in the form of, for example, training and counselling programs, would seem to enjoy success in the aftermath of retrenchments. In this regard, Caudron's (1996) investigated case studies on the survivors at Compaq Computers retrenchment during 1991, the State of Oregon's retrenchment of 1993, and the Patagonia retrenchment of 1992, provided evidence of the correct management of survivors. In these specific instances, positive results flowed because the survivors received proper training and counselling following retrenchments, the organisations supported the need for the concerns of the surviving employees to be heard and they were furthermore shown that they should not feel victimised by the retrenchment process, but instead see it as an opportunity for personal growth. This led to a successful change effort for all involved.

Another explanation for positive survivor responses was reported in the research by Kaye (1998) who distinguished between two types of survivor responses, namely the SOBBOS or "Staying On But Building Options" and the HOBBOS or "Hanging On But Bummed Out". In the former, Kaye (1998) describes SOBBOS as those survivors who are successful in getting ahead and moving past the trauma and difficulties associated with retrenchments. While they may exhibit some of the "survivor syndrome" symptoms in the short term, they typically have the ability to rapidly shift from the negative mindset. They also are aware of the changing nature of the workplace in contemporary times and the impact that this may have on the traditional employment contract (as mentioned earlier in this chapter) and therefore shape their experiences during retrenchments accordingly. The HOBBOS functions less effectively and appear to be stuck in a negative mindset, where they too experience the symptoms of "survivor syndrome", but they do not prepare themselves for the changing nature of the workplace and hence

expectations of life-long employment result in them experiencing difficulty in exhibiting effective coping behaviour.

From the preceding discussions on retrenchment outcomes, it would seem that the way in which organisations handle retrenchments is key in influencing the experiences of all affected stakeholders. Such an initiative needs to be undertaken as part of a broader approach, as well as with consideration of the "why", the organisation's readiness for change and the organisational context (i.e.: culture, trust and leadership). This would require a well thought through longer-term retrenchment plan, an effective termination plan for the victims and a survivors support plan. The aforementioned would seem to be encapsulated by Appelbaum and Donia (2001) who have suggested that overall the aid and support that the retrenching organisation provided to all affected stakeholders during such a period characterized the organisation itself. Moreover, different personality traits of survivors would seem to play a role in how survivors cope with the impact of retrenchment.

Experiences and perceptions of justice will be discussed next as it provides insight into the role that it plays in understanding stakeholders' reactions to retrenchments.
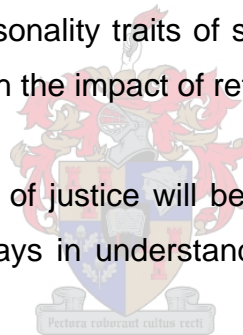
2.7. Retrenchment and Issues of Justice

Previously it was regarded as the right of management, so-called "management prerogative" to reduce or enlarge the employee force according to the dictates of production and economic cycles and in terms of business rationale (Bendix, 2003; Dermer, 1988; Purcell, 1993; Wellens, 1975). Within the South African scene, the growing emphasis on employee rights and especially the right to job security has changed this position. Employers can no longer claim that retrenchment is entirely a managerial prerogative, nor can these be undertaken on an ad hoc basis. The very necessity for retrenchments, particularly those due to cyclical downturns, is being questioned and on the macro-level the necessity for retrenchments is viewed as a direct result of the inadequate workings of a capitalist system by unionists. As far as trade unions are concerned, employers' reasons for

retrenchment, such as falling demand, the need for more effective manpower utilisation and the like, are not acceptable. Nonetheless, if there is no alternative, union and employee representatives will eventually accept the inevitability of retrenchment, as long as it is concluded in a fair and equitable manner (Bendix, 2003). The research on organisational justice showed that when employees perceived that they were being treated unfairly, they reacted negatively with lower morale, work commitment and trust (Schaubroeck, May & Brown, 1994).

By 1990, research into survivors of retrenchment had taken a step forward from the earlier stance with equity theory, towards the use of justice theory. Brockner (1994) proposed that the use of organisational justice might enhance a more comprehensive understanding of why survivors reacted in the way that they do to retrenchments. This theory enabled Brockner to expand the issue of "fairness" of the retrenchments to include the outcome, procedures and interpersonal treatment received by employees. Hence, the survivors' perceptions of four different types of justice combined to form the overall justice perception, namely: distributive, procedural, interactional, and informational justice. It could be argued that implementers form part of the surviving group of stakeholders and so perceptions of organisational justice would therefore also seem to apply in their case.

Distributive justice refers to the perceived fairness of the substantive decision to retrench and the allocation of rewards or outcomes during and following the retrenchment of the victims (Brockner, 1992; Greenberg, 1987). Noer (1993) referred to these outcomes as "caretaking". One determinant of distributive justice is therefore the perception of how well the organisation provided for the victims or intervened to ensure that the victims were treated fairly. Examples of this included providing outplacement counselling, generous severance pay allowances and sufficient notice for victims to search out new opportunities. These factors increased the likelihood that retrenchment would be perceived as fair.

Procedural justice refers to the perceived legitimacy of the retrenchment that is, perceived fairness of the process used to implement the retrenchment decision and therefore, for example, the inclusion of affected employees in the organisational decision-making process (Brockner, 1992; Greenberg, 1987).

Interactional justice is achieved when the organisation is perceived to have treated victims with dignity and respect throughout the process of retrenchment. The greater the perceived dignity and respect afforded the victims, the more positive the outcomes for the survivors (Brockner, 1994).

Informational justice refers to the amount and type of information provided in the organisation's communications with victims about the retrenchment. Therefore, as the clarity of explanation received during the retrenchments increased, so does the perception of the retrenchment as a just and fair decision (Brockner & Wiesenfeld, 1996). Bies and Shapiro (1988) agreed that employees generally reacted better to undesirable resource allocations when they were given a good reason for those decisions.

Various researchers on organisational justice concluded that it could mitigate the influence of negative retrenchment outcomes (Brockner 1992; Greenberg, 1987) and a fair retrenchment plan may improve remaining employees employment security and commitment (Moorman, 1994). Such a plan would therefore have the following features: consultation with employees or their representatives (Brockner, 1992); credible sources of two-way communication (Shapiro, 1991); adoption of fair selection criteria and voluntary retrenchment or early retirement opportunities (Greenberg, 1987); and identifying job functions and work performance as a basis of selection criteria (Labib & Appelbaum, 1993). Procedural fairness and a comprehensive communication strategy (or informational justice) give employees a voice in decisions affecting them. This enhanced understanding and work commitment (Isabella, 1989; Shapiro, 1991). Compassionate (or interactional justice) and fair treatment (or distributive justice) included advance notification of job redundancy and an adequate severance package (Greenberg, 1990; Labib et al., 1993; Leana & Feldman, 1988).

The remaining employee's perceptions of organisational justice is just as significant for their perception of the situation as their own destiny and perceptions of job security (Appelbaum & Donia, 2000; Brockner, 1992; Holmstrand & Stens, 2001; Noer, 1993). This is key as some researchers (Guest & Peccei, 1992, cited in Kinnie, Hutchinson & Purcell, 1998) suggested that symptoms of survivor syndrome were alleviated when survivors perceived the situation to be handled fairly for both those leaving and for those remaining. Remaining employees may be more committed if they perceived that retrenched colleagues were adequately compensated and treated fairly and were likely to maintain their level of trust in management and remained proud to work for the organisation (Fowke, 1998). Others have also offered considerable support for the positive relationship between the perceived justice of the retrenchment implementation and the psychological and behavioural outcomes of the retrenchment for survivors (Brockner, Davy & Carter, 1985; Brockner & Greenberg, 1990; Brockner, Greenberg, Brockner, Bortz, Davy & Carter, 1986; Brockner, Grover, Reed, Dewitt & O'Malley, 1987; Brockner & Wiesenfeld, 1996; Fried, Tiegs, Naughton & Ashforth, 1996). The perceived justice of a retrenchment may also change the survivors' perceptions of the link between work behaviours and attitudes and organizational rewards and punishments (Brockner, 1992).

2.8. The Legal Position in South Africa

Section 189 of the Labour Relations Act, 66 of 1995 (as amended), amplified by the Code of Good Practice: Dismissal Based on Operational Requirements codifies the principles dealing with dismissals for operational requirements (retrenchments).

Section 213 defines the term "operational requirements" to mean, "requirements based on the economic, technological, structural or similar needs of an employer" (Thompson & Benjamin, 2006).

The various provisions of s189 pertaining to dismissals for operational requirements and s189A pertaining to dismissals based on operational

requirements by employers with more than 50 employees are discussed below.

Relevant legislation that was consulted for this section on the legal requirements pertaining to dismissals for operational requirements were obtained from the Labour Relations Act, 66 of 1995 (as amended), s189 and s189A and the Basic Conditions of Employment Act, 1997, sections 35, 37 and 41 (Labour Protect, 2006; Thompson & Benjamin, 2006).

2.8.1. Dismissals for Operational Requirements

According to s189 when an employer contemplates dismissing one or more employees based on operational requirements, the employer must consult with the parties identified in the collective agreement, the registered trade union, workplace forum or employees representative(s), as the case may be.

The consulting parties are obliged to enter into a joint consensus seeking process and must attempt to reach consensus on appropriate measures to avoid the dismissals (for example adjusting working hours, eliminating temporary labour, eliminating overtime and offering early retirement or voluntary retrenchment), minimising the number of dismissals, changing the timing of the dismissals and ways to mitigate the adverse effects of the dismissals. They also need to reach consensus on the method for selecting the employees to be dismissed as well as the severance pay for dismissed employees.

Consultation is an essential step and when an employer considers retrenching employees because of operational requirements, he must, disclose in writing to the other consulting party relevant information pertaining to the possible retrenchments, including but not limited to: the reasons for the proposed dismissals; alternatives that the employer considered before proposing the dismissals and the reasons why those alternatives were rejected; the number of employees likely to be affected and their job categories; the proposed method for selecting which employees to dismiss; the time when, or the period during which, the dismissals are likely to take effect; the severance pay

proposed; any assistance that the employer proposes to offer the employees likely to be dismissed. Examples could include offering time off to attend interviews, early release should a new job be found, issuing letters of reference, psychological counselling and the possibility of future re-employment (Labour Protect, 2006).

In terms of section 41(2) of the Basic Conditions of Employment Act, 75 of 1997 (as amended), an employer is required to pay severance pay equal to at least one week's remuneration for each completed year of service. The entitlement to severance pay falls away if an employee unreasonably refuses the employer's offer of alternative employment with the same employer or any other employer.

The employer must give the other consulting party an opportunity to make representations about any matter on which they are consulting. Representations must be considered and be responded to and if the employer does not agree with them, the employer must state the reasons for disagreeing.

The employer must select the employees to be dismissed according to selection criteria that have been agreed to by the consulting parties, or if no criteria have been agreed, criteria that are fair and objective. The "last in first out" principle (LIFO) is often applied, but is not the only consideration and not required by law. In this case, there are instances that employers retain employees with key established skills or who occupy specific specialised positions. Poor performance records can be taken into consideration (Labour Protect, 2006).

Statutory notices of termination of services are handed to those employees who are to be retrenched once the consultation process has been completed and all employees' counterproposals, questions and concerns have been addressed in writing.

Disputes over the fairness of an operational requirements dismissal must be referred to a bargaining council with jurisdiction or, failing that, the Commission for Conciliation, Mediation and Arbitration (CCMA) for conciliation. If the matter is not resolved in either forum, the employee may refer the case to the Labour Court for adjudication. In the case of the retrenchment of a single individual, that employee may elect to refer an unresolved dispute either to arbitration (by a council or the CCMA) or to the Labour Court.

2.8.2. Special Provisions for Larger-scale Retrenchments

During 2002 section 189A was introduced into the Labour Relations Act providing special rules for larger-scale downsizing (Thompson, & Benjamin, 2006). From then on, in the case of larger-scale retrenchments employees and their unions were given the choice of contesting an employer's decision through either litigation or industrial action.

New legal provisions apply if an employer with 50 or more employees contemplates dismissing by reason of the employers operational requirements, at least:

- 10 employees - if the employer employs up to 200 employees
- 20 employees - if the employer employs between 201 and 300 employees
- 30 employees - if the employer employs between 301 and 400 employees
- 40 employees - if the employer employs between 401 and 500 employees
- 50 employees - if 500 and above, or

If in the 12-month period preceding the notice of retrenchment, the employer contemplates retrenching a total number of employees falling into any of the above categories.

As with s189, when an employer contemplates dismissing one or more employees based on operational requirements, the employer must consult with the parties identified in the collective agreement, the registered trade union, workplace forum or employees representative(s), as the case may be.

The employer is required to issue a notice in the form of an invitation to begin a consultation process to the relevant consulting parties. When notice is given, the employer is required to disclose all relevant information and in the event of a dispute regarding disclosure, the onus will now be on the employer to show the information sought is not relevant. A process of consultation needs to be embarked on which is defined as "an engagement in a meaningful joint consensus seeking process" in an attempt to reach consensus on issues such as measures to avoid or mitigate retrenchment, selection criteria and severance pay.

The consulting parties may agree to vary the time periods for facilitation or consultation.

If the employer or the consulting parties representing the majority of employees whom the employer contemplates dismissing have requested facilitation and have notified the Commission within 15 days of notice, the Commission must appoint a facilitator to assist parties engaged in consultation. If a facilitator is appointed, the facilitation must be conducted in terms of any regulations made by the Minister of Labour for the conduct of such facilitations.
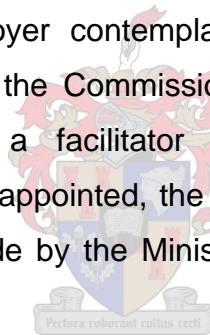
After the conclusion of the 60-day facilitation process, and if there is no consensus between the parties, the employer is then entitled to give notice of termination of contracts of employment in terms of s37(1) of the Basic Conditions of Employment Act and a registered union or the employees who have received notice of termination may either give notice of a strike in terms of s64(1)(b) or (d) of the Labour Relations Act; or refer a dispute on the reason for the dismissal to the Labour Court for adjudication in terms of s191(11).

If neither party requires the appointment of a statutory facilitator, the parties may not dismiss or engage in industrial action or refer a dispute to the Labour Court for an equivalent 60-day period.

If any consulting party wishes to challenge the fairness of a consultation process, it may challenge the outcome in the Labour Court. Any application in this regard must be brought within 30 days of the issuing of a notice of termination of employment.

The major policy change the 2002 amendments brought about was to give unions and employees the option of opposing retrenchment through industrial action. In terms of section 189A, employees may elect after the consultation process to either strike, in certain circumstances, or refer the matter to the Labour Court for adjudication. Strikes should be conducted in terms of s64, essentially like all other strikes. Secondary strikes are permitted on 14 days notice.

In the next section the impact of retrenchments on the organisation, with specific reference to the various stakeholders, that is the victims, survivors and implementers, will be discussed.

2.9. The Impact of Retrenchments

2.9.1. The Organisation

Various authors have indicated some common patterns of change in the work environment of organisations during retrenchment. Organisational communication seemed to decline though it is likely to be principally important during these times (Cascio, 1993; Dougherty & Bowman, 1995; Noer, 1993). Organisational trust also seemed to decline coupled with an increase in fear (Buch & Aldridge, 1991; Cascio, 1993). Retrenching organisations exhibited increased rigidity, resistance to change, uncertainty and turbulence (Cameron, Sutton & Whetton, 1987; Tombaugh & White, 1990). Staw, Sandelands and Dutton (1992, p. 516) proposed that under conditions of threat - an external event or situation which individuals, groups or organizations perceive as having negative or harmful consequences like retrenchment, organisations undergo a "mechanistic shift", where information becomes centralised, communication restricted and an increase in reliance on familiar habitual responses that are likely to be dysfunctional.

2.9.2. The Victims and Survivors

Much is now known about the social, psychological and medical effects of unemployment on the victims of retrenchment (Fryer & Payne, 1986, cited in Wright & Barling, 1998) as well as the consequences (anger, anxiety, fears and medical consequences of job insecurity) on the survivors and the resulting impact on job involvement (Brockner, Grover, Reed & DeWitt, 1992; Cascio, 1993; Grunberg, Moore & Greenberg, 2004).

There is also research on the "lame ducks", those employees who know for sure that they will lose their jobs in the foreseeable future, but who have in the meantime kept their jobs (Brockner, Konovsky, Cooper-Schneider, Folger, Martin & Bies, 1994).

Studies on survivors' attitudes in the aftermath of retrenchment consistently indicated that survivors' job attitudes such as job satisfaction, job involvement, organisational commitment, and intentions to remain with the organisation became increasingly negative (Holmstrand & Stens, 2001; Morar, 2004). These negative reactions, combined with the fact that survivors must do more with less, make the aftermath of retrenchments difficult to deal with (Brockner, Grover, Reed & Dewitt, 1992; Brockner, Konovsky, Cooper-Schneider, Folger, Martin & Bies, 1994; Hallier & Lyon, 1996).

The term "survivor syndrome" was coined by the psychiatrist W.G. Niederland in 1968 and refers to survivors of fatal catastrophies around the world like the Holocaust and the nuclear bombs dropped on Japan. The disorders observed in individuals who have survived such calamities are recognised as severe pathologies and are collectively referred to as Posttraumatic Stress Disorder, under the category of mental illness. Symptoms ranging from fear of persecution, inner tension, diminished self-esteem, lack of initiative and general apathy right up to depression and a paradoxical sense of guilt at having survived are directly observable in survivors (Dupuis, Boucher & Clavel, 1996). Noer (1993), considered a leading expert on the impact of major upheaval on individuals in organisations, suggests that the symptoms of "survivor syndrome in organisations" exhibit to a lesser degree a similar range

of emotions as described by that of the Posttraumatic Stress Disorder syndrome associated with the catastrophies mentioned before. He refers to the condition as "Survivor Sickness" and those left behind as "survivors". Common symptoms among survivors are particularly strong in organisations that have historically taken great care of their employees. Surviving employees often deny survivor symptoms. Noer (1993) used the term "psychic numbing" to describe the denial which is stronger the higher the position in the organisation and among those who plan and implement retrenchments. "Survivor Syndrome" or "Survivor Sickness" has elements of psychic numbing. Some symptoms include denial, job insecurity, feelings of unfairness, depression, stress and fatigue, reduced risk-taking and motivation, distrust and betrayal (Noer, 1993), lack of reciprocal commitment, wanting it to be over, dissatisfaction with planning and communication, anger at the retrenchment process, lack of strategic direction, lack of management credibility, short-term profit focus and a sense of permanent change (O'Neill & Lenn, 1995). There were also some unexpected findings with regard to survivors, including little survivor guilt, some optimism, lots of blaming others, and a thirst for information (Noer, 1993). Kaye (1998) furthermore referred to the survivors' personality characteristics (as mentioned earlier in this chapter) and psychological adaptation following retrenchments, which thwart or promote the experience of "survivor sickness". Another significant characteristic of "survivor sickness" is the persistence of these symptoms. Noer (1993) found that five years after the effects were clinically observed, most of the symptoms were still present, if not more pronounced.

Interestingly, both survivors and victims shared common symptoms. Noer (1993) in fact believed the terms (survivors and victims) become reversed: those who leave become survivors, and those who stay become victims (Wright & Barling, 1998).

2.9.3. The Implementers
One group that has seemingly failed to attract any systematic focus are the implementers (Noronha & D'Cruz, 2006) of the retrenchment, also referred to the "executioners" (Wright & Barling, 1998); "terminators" (Mishra, Spreitzer &

Mishra, 1998); "downsizers" (Folger & Skarlicki, 1998); "performers of necessary evils" (Molinsky & Margolis, 2005); "axemen" or "hit men" (Sloan, 1996); that is those individuals who must plan for and/or carry out the retrenchment.

Sharing bad news with employees is never painless and is often accompanied by "terminator guilt". These frontline managers can become the scapegoats for a top management decision (Mishra, Spreitzer & Mishra, 1998) and they are caught in the middle between their responsibilities to the organisation and to their subordinates (DeWitt, Trevino & Mollica, 2003, cited in Grunberg, Moore & Greenberg, 2004).

What is more, retrenching employees who may be long-time acquaintances or friends is likely to be a very "painful process", one that leaves an "indelible imprint" on the implementers (Kets de Vries & Balazs, 1997). Undeniably, "letting people go" created so much discomfort for managers that psychologists noted a range of responses on the part of the implementers. In particular a common tendency noted was to try and minimise the discomfort by avoidance and distancing behaviours, where implementers for example hold very short and curt meetings to inform the employee of the retrenchment (Cameron, Freeman & Mishra, 1993; Folger & Skarlicki, 1998; Kets de Vries & Balazs, 1997).

Organisations historically would seem to rely on preparing implementers to follow legal procedures when implementing retrenchments (I-Net Bridge, 2005; Israelstam, 2002; Mishra, Spreitzer & Mishra, 1998; Roskam, 2002; South African Press Association (Sapa), 2005). Moreover, Knowdell, Branstead & Moravec (1994, cited in Noronha & D'Cruz, 2005) suggested that traditional supervisory and management development programmes focused on amongst others people development and recruitment and so with the advent of frequent retrenchments, it is also important for implementers to learn how to retrench employees humanely and compassionately and to handle the emotions (those of the employees and their own) that are felt and expressed.

It is in the best interests of all organisational stakeholders that are part of retrenchment initiatives to systematically explore the consequences of retrenchment on this neglected group of organisational stakeholders, thereby not only adding to existing research on the survivors and victims, but also providing researchers and practitioners with a more complete grasp and appreciation of the human costs of retrenchments (Grunberg, Moore & Greenberg, 2004). Furthermore, studying implementers' reactions to the actual implementation of retrenchment decisions is also important because how they react and behave in the post retrenchment environment can help shape the outcomes, that is attitudes and behaviours of employees and therefore the morale and effectiveness of the workforce (Wiesenfeld, Brockner & Thibault, 2000).

In this study, the focal point will become the experiences of the implementers.

2.10. Summary

It is clear that retrenchments have increasingly become a fact of life in the world of work today and often used as a necessary means of cutting costs to remain profitable during difficult times. It is also clear that the "old fashioned" scenario of lifelong employment has generally vanished from the workplace and that the task of implementing the retrenchment has seemingly been made part of the managerial job function. The literature shows that historically implementers have been prepared for their role by ensuring that they are familiar with procedural issues as per the legal requirements, with limited attention focused to their personally experienced felt demands in implementing the retrenchment.

In this chapter, the various themes as they relate to retrenchment literature was discussed by providing a general overview of retrenchment terminology, the extent of retrenchments locally and internationally, rationale offered by business leaders for retrenchment, implications of retrenchment for the traditional employment contract and the accompanying psychological contract. Also included were retrenchment outcomes, issues of fairness and justice as applied to experiences of retrenchments, the legal position in South

Africa and the impact of retrenchment on the stakeholders affected by retrenchment.

The ability of implementers to successfully manage the emotional and psychological impact of implementing retrenchments on themselves is dependent on the extent to which they understand the latent variables that affect their experiences and the manner in which these variables shape their behaviour.

In this regard the following chapter (Chapter 3) will discuss the experiences of implementers. This entails an in-depth coverage of their procedural experiences as well as personal experiences. Following this discussion, delivering the retrenchment message and enabling strategies are discussed.
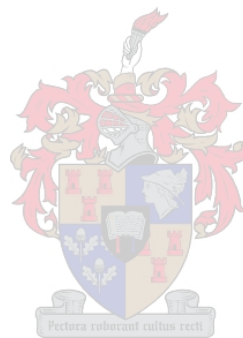
CHAPTER 3: IMPLEMENTERS' PERSONAL EXPERIENCES

3.1. Introduction

The following chapter provides a review of the literature pertaining to the experiences of the implementers. This entails an in-depth coverage of the implementers' procedural and personal experiences when implementing retrenchments and the resulting effects on both their wellbeing and functioning within and outside of the organisation.

The implementers' procedural experiences are discussed with specific reference to being convinced of the need to retrench, the procedures followed to initiate the retrenchment programme, target setting, role preparation, voluntary and involuntary retrenchment and post retrenchment follow-up processes.

This is followed by a discussion of the implementers' personal experiences with insights into the managing of organisational expectations, the experienced felt demands of sharing the bad news with interpersonal sensitivity and coming to terms with their role. Also included are their experienced feelings to the news of the retrenchment, their experiences of victim and survivor reactions, perceptions of self, experiences of guilt and a sense of responsibility, role overload and role conflict, feelings of decreased personal wellbeing, organisational and social isolation and job insecurity.

The difficulties associated with delivering the message in an interpersonally sensitive fashion are also included. In this regard the outcomes of what is termed as "dysfunctional conversations" are discussed.

The penultimate part of this chapter explores the literature on coping strategies that implementers rely on in an attempt to regulate their emotions and treat the victims with interpersonal sensitivity and respect when implementing retrenchments.

The final part of the chapter focuses on the role that organisations can proactively play in preparing, assisting and supporting implementers for the challenges they may face in handling retrenchment conversations.

3.2. Procedural Experiences of Retrenchment Implementers

From the literature it is clear that the implementers experience both procedural and personal aspects of retrenchment. Authors have suggested that retrenching others is an intensely negative event (Kets de Vries & Balazs, 1994; Smith, 1994). The imperative to retrench nonetheless is an unfortunate business reality and how to retrench has attracted a lot of attention with models on how to implement the retrenchment (Appelbaum, Close & Klasa, 1999; Appelbaum & Donia, 2001; Kinnie, Hutchinson & Purcell, 1997; Mishra & Mishra, 1994; Osborne-Kilpatrick, 1999; Thornhill & Saunders, 1998; Tomasko, 1992).

Despite their crucial role in retrenchment, researchers, models and best practice guidelines have however largely neglected the implementers who are responsible for implementing the retrenchment. Little is known about the experiences and emotional challenges they are faced with in their attempts to produce interpersonally sensitive behaviour when delivering retrenchment messages, how they cope with these challenges and what organisations can do to support them (Molinsky & Margolis, 2005, 2006, Noronha & D'Cruz, 2005, 2006, Wright & Barling, 1998).

Implementers suffer negative consequences and because their organisational functioning may well be impaired, it behooves organisations and researchers alike to address the issue of how implementers' wellbeing can be preserved and organisational functioning enhanced (Molinsky & Margolis, 2005). In this regard, several themes consistently emerged from the limited research on their experiences, with the procedural experiences relating more to the processual aspects experienced by the implementers (Noronha & D'Cruz, 2005, 2006) and the personal experiences suggesting that retrenching others is both personally and professionally demanding and leads to amongst others, experiences of role overload and role conflict, a search for meaning, social

and organisational isolation, a decline in personal well-being and a sense of isolation (Wright & Barling, 1998, Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2006, Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997). The case studies by Noronha and D'Cruz (2005, 2006) will be used as a basis for the discussion of the procedural and personal experiences of the implementers.

3.2.1. Procedural Aspects of the Experience

According to implementers in the study by Noronha and D'Cruz (2006, p.103), the local economic circumstances, which prompted their organisations' need to retrench employees, were undisputed. They however were also mindful of the fact that "mindless recruitment" practices, that is, where no scientific or rational approach to recruitment had been adopted, was partially responsible for the current situation as is illustrated by the following comment: "As HR, our role…we should have foreseen…but then the going was good, so nobody bothered, …everybody thought the bigger you are the better, larger the size, greater the strength". What follows is an attempt to explore the detail of the procedures and processes as reportedly experienced by implementers.

3.2.2. Initiating the Retrenchment Programme

Implementers in Noronha and D' Cruz's study (2006) indicated that once the decision had been made to retrench, top management engaged with union leaders, explaining the need to retrench and the proposed benefits on offer. A series of discussions and negotiations ensued, during which time they managed to gain the union's support and endorsement. In conjunction with the union consultation, mass awareness was created throughout the company via various communication strategies. The Managing Director addressed the employees at all meetings, posters and notices were displayed and in-house publications carried information. Human Resources Managers, in this case the implementers, briefed employees within their business units via group meetings and union leaders discussed the matter with its members. This approach is supported by Appelbaum and Donia (2001) and Knowdell, Branstead & Moravec (1994, cited in Noronha & D'Cruz, 2005) who suggested that the most senior person in the business like the Chief Executive Officer addressed employees about business imperatives, steps for

remediation and desired end results. They further indicated that Human Resources Managers discuss severance pay and benefits and other assistance available to affected employees. Middle managers should explain business and economic problems that advanced the situation, other cost reduction measures considered and/or instituted and why, the impact on other departments, groups which are specifically affected and changes in functions and responsibilities. Moreover, they recommended that written press releases are prepared for local news agencies, not only highlighting the economic viability of the organisation, but also embodying a spirit of concern for employees and for the community affected.

An important consolation to the implementers in both the Noronha and D'Cruz case studies was that the organisations had ensured that all actions relating to the retrenchment were within the purview of existing labour laws and union negotiated agreements and that the design of the Voluntary Retirement Scheme attempted to maximise the benefits for the affected employees (Noronha & D' Cruz, 2005, 2006).

3.2.3. Setting and Meeting Targets

Parallel with the communication strategy, target setting was initiated which involved planning and negotiations with the union. The targets would affect all and permeate down the organisational hierarchy and the number of superfluous manpower was identified in each business unit. The final number to be retrenched was settled by way of negotiations with the union. Implementers were responsible to meet their business unit's targets in a phased manner (Noronha & D' Cruz, 2005, 2006).

3.2.4. Preparation

Implementers in the Noronha & D'Cruz study (2005) reported feeling unprepared for the role enactment expected of them. Previous research showed that managers and supervisors have the most impact on making or breaking employees' reactions to a transition (Larkin & Larkin, 1996). Yet in most organizations, they are poorly prepared for their role in implementing transition activities. When an organisation offers a voluntary retrenchment package, for example, managers and supervisors find themselves in the

awkward position of counselling employees on whether to stay or go. No one wants to tell an employee his or her services are no longer needed, even if it is the most humane thing to do when a subsequent wave of involuntary cuts looms. According to Marks and DeMeuse (2002) it is especially difficult for managers in organisations engaged in multiple waves of retrenchments, as the obvious low performers have already been removed, leaving good contributors who also have to be retrenched.

3.2.5. Voluntary Retrenchment

Those employees who wished to participate in the Voluntary Retirement Scheme approached the implementers during the initial phases of the retrenchment and typically were those who were able-bodied and employable. Implementers indicated that these volunteers were willing and happy to leave, as they would receive additional payment. Other volunteers included shift workers, employees with other interests, those with limited family responsibility, those with poor health and some wanting to retire early (Noronha & D'Cruz, 2006). Implementers also experienced a second and third category of responses to the call for volunteers, namely those who were unsure of which direction they should take. The third category comprised those who had responsibilities like children's education, feelings of social status and identity that accrued as a result of being employed and emotional attachment to the organisation and were unsure about their future employability (Noronha & D'Cruz, 2005). This experience is supported by Doherty (1998) on the various functions of work, namely a social activity which not only provides a means of existence but also a source of social identity and status, and so in the light of this the outcome of retrenchment may lead to a loss in self confidence and dignity, anxiety and despair - especially where there are poor social security provisions. Both the second and third category of volunteers was assisted with their decision-making via counselling sessions with the implementers (Noronha & D'Cruz, 2005).

3.2.6. Involuntary Retrenchment

Once the volunteer pool had dried up, implementers had to resort to various strategies to meet their separation targets. They approached this by examining records on issues such as age, performance, ill health and

attendance. It was believed that employees older than 50 years of age had limited liabilities and could take early retirement. Moreover, habitual absentees, chronic alcoholics and non-performers were considered liabilities for the organisation and hence should be separated through the Voluntary Retirement Scheme (Noronha & D'Cruz, 2006). A concerted effort was made not to target younger employees who had greater liabilities and would therefore in their view be worse off. In addition, those who were considered to have scarce skills were dissuaded from leaving. Targeting was seen as painful by some implementers as it involved singling out people that would have to leave. In the case of this participating organisation (Noronha & D'Cruz, 2005) the first round of the Voluntary Retirement Scheme did not deliver sufficient numbers and other employees resisted, as the government had not yet given permission for the plant closure. In response, the management team redesigned the Voluntary Retirement Scheme package offered, which prompted a similar number (700 – 800) of volunteers as with the first round, to apply for the Voluntary Retirement Scheme. This, however, complicated issues, particularly in the light of organisational justice issues and perceived fairness in the amount and allocation of rewards among individuals (Appelbaum & Donia, 2001) and soured relationships between managers and employees. Additionally, it also inadvertently sent out the message that if they waited long enough, the severance scheme would get more attractive over time (Noronha & D'Cruz, 2005).

Those who were specifically targeted were called to counselling sessions, where the overall strategy was to show employees the attractiveness of the Voluntary Retirement Scheme. Their final packages were also calculated and the information shared with them. In the case of illiterate employees, the counselling sessions demanded a lot of effort on the part of the implementers, who furthermore reported having to be doubly careful with educated employees, since they easily found loopholes (Noronha & D'Cruz, 2006).

Implementers additionally indicated that while some employees were eventually convinced during the counselling sessions, others pleaded, bargained, broke down or refused. In some instances, implementers invited

affected families to counselling sessions in an attempt to convince them to take the voluntary option (Noronha, & D'Cruz, 2006). A few implementers in both case studies (Noronha, & D'Cruz, 2005, 2006) reported using strong persuasion tactics, even admitting to resorting to harsh tactics at times to convince employees to opt for the Voluntary Retirement Scheme. Implementers justified these measures for various reasons, like meeting targets, a lack of choice as is illustrated by the following: "our approach was very frank and undiplomatic. We left behind all professional ethics. We accepted it as a professional hazard…we managed the role by dominating the workers…and we would force them to take the scheme" (Noronha & D'Cruz, 2005, p.86); and the personality of the employee as is illustrated by the following: "we have a history of people who never worked…so if you did not take a stand with them… they will sit on your head. You have to be tough in talking to them" (Noronha & D'Cruz, 2006, p.99). Having to resort to such tactics validated various authors' research that the people dimension is often marginalised in implementing retrenchment programmes (Cameron, Freeman & Mishra, 1993; Folger & Skarlicki, 1998; Kets de Vries & Balazs, 1997).

Implementers used other alternatives to convince targeted employees. Those who refused to cooperate were threatened with transfers to lower level jobs or with dismissal and informed that they would get less money than what they would get if they took the voluntary scheme. One implementer in this case study evaluated his role and remarked: "There was nothing voluntary about it. In 90 percent of the cases we forced them. But we never thought that we were doing anything wrong, because we had to save the company" (Noronha & D'Cruz, 2005, p.86).

3.2.7. On-going Concern and Interest for Separated Employees

According to Appelbaum & Donia (2001) the overall aid and support that the organisation provided to their employees during and after a retrenchment period characterised the organisation itself. As part of the Voluntary Retirement Scheme, assistance was provided to help separated employees manage their severance packages via meetings with representatives from

banks and financial institutions who provided advice on investments and long term financial planning (Noronha & D'Cruz, 2005, 2006).

In addition, although both organisations' Human Resources Departments had no formal follow-up system in place to keep track of separated employees and their welfare, all implementers invited employees at the time of their departure to approach them for further advice and assistance. The attitude was to let the employees take the initiative to keep in touch. Informally, follow up occurred via surviving colleagues at the company or when employees returned for specific queries. Chance meetings in public places also provided opportunity to check on welfare, if separated employees continued living in the same town (Noronha & D'Cruz, 2005, 2006). Information gathered in this way showed that the circumstances of victims ranged from good to bad and happy to unhappy. Some had managed to secure alternative employment and it was also believed that over time, negative feelings had subsided (Noronha & D'Cruz, 2006).

Having focused on the procedural aspects of the implementers' experiences in the preceding section, the following section will discuss the personal aspects of the implementers' experiences.

3.3. Personal Experiences

3.3.1. Managing Organisational Expectations

Implementers in Noronha and D'Cruz' study (2006) described organisational expectations as the manner in which their superiors followed up on their implementing performance. Every week started with a meeting with top management where performance and progress against targets set, were reviewed. Other issues discussed included reasons for non-performance against targets, setting further targets for the week, focusing on the manpower requirements for each business unit and the capacity of the implementer. There was an expectation that implementers would push themselves in achieving targets and during the rest of the week, their seniors checked on their progress, holding review meetings where necessary.

3.3.2. Delivering the Message with Interpersonally Sensitive Treatment

Some of the challenges faced by the implementers in performing the retrenchment included not only performing the task (i.e. the act of retrenchment) but also performing it with interpersonal sensitivity. Interpersonal sensitivity refers to treating the victims with compassion, dignity and respect, which serves to restore a sense of humanity and connection to the experiences that the people have at work (Frost, Dutton, Worline & Wilson, 2000, cited in Molinsky & Margolis, 2005).

In explaining why interpersonally sensitive treatment is so challenging, despite its evident benefits, Folger and Skarlicki (2001) suggested that it exacts emotional costs from those who must perform harmful acts. These experiences are likened to the experiences of other professional fields where, for example, social workers and clinical psychologists must deliver "tough love" to substance abuse clients (Ruden, 2000, cited in Molinsky & Margolis, 2005, p. 245) and health care workers must perform physically painful procedures on patients (Halpern, 2001, cited in Molinsky, & Margolis, 2005, p.245). The personal contact required to accord interpersonal sensitivity exposed professionals to for example their own culpability for the harm, as well as to victims' negative reactions. Aversion to their experienced discomfort and their underestimation of that discomfort's cost (Gilbert, Driver-Linn & Wilson, 2002, cited in Molinsky & Margolis, 2005, p.246) result in those people, who must conduct retrenchments, admit errors and deliver bad news, to, in some cases, distance themselves from their targets (Folger & Skarlicki, 2001). Earlier research even suggested that professionals sometimes not only were unsuccessful in acting in an interpersonally sensitive manner but also failed to perform the demanding and injurious task itself (Bazerman, Tenbrunsel & Wade-Benzoni, 1998; Christakis, 1999).

3.3.3. Professionally and Personally Demanding

According to Molinsky and Margolis (2006) the experience of delivering a retrenchment message is challenging for two reasons: the implementers in their study had limited experience with dire personnel situations and then there was their existing relationships with the affected employees. Other

authors added that implementers experience a range of negative emotions, often at a high level of intensity, ranging from anxiety and fear to sympathy, sadness and guilt, sometimes even shame, before, during and after the retrenchment event (Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2006). Knowdell, Branstead & Moravec (1994, cited in Noronha & D'Cruz, 2005) added that in addition to guilt, managers reported discomfort and depression.

Wright and Barling's (1998) work showed that implementers found the experience to be both professionally and personally demanding. They described it as the most difficult task that they had performed in their professional lives. The experience had changed their work and personal values and beliefs, their relationships with their staff and even their relationships with their families. They continued to add that this was not a short-lived experience, troubling many of the implementer's years after the event. They revealed that the experience had powerful long-lasting emotions, that the remaining employees questioned their integrity and that they now worried about their own future, a view that is supported by other researchers (Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2006).

3.3.4. Coming to Terms with the Implementer Role

Participation in a retrenchment process underscored a grave dilemma, especially since managers are trained to see their role as one of giving employment and developing people, but retrenchment demands actions to the contrary (Molinsky & Margolis, 2006; Noronha & D'Cruz, 2006; Wright & Barling, 1998). Some implementers felt a sense of discomfort with their task. Junior implementers especially stated that nothing in their training had prepared them for this task. For more senior implementers, the issue was balancing management and union needs, seeing both sides and representing both interests. At the same time they were fully aware that regardless of their opinions and feelings, they had no choice but to do this task as refusal to do this would put their own positions at risk. Implementers therefore preferred not to think too much about it, because if they did, they would not be able to

proceed with the task at hand and this could cost them their livelihood, career and so on. Neither the emotional distress, nor the receipt of threats, led them to contemplate quitting their jobs, despite requests from their families. They wanted to prove that they could manage the situation. Some implementers felt unappreciated despite their work and that they were being "used" by top management to do the work that they did not want to do. Victims blamed them for the separation and so some implementers resigned (Noronha & D'Cruz, 2006).

3.3.5. Mixed Feelings

The implementers' perception that the task was difficult came out strongly in the literature review. All implementers reported mixed feelings (Kets de Vries & Balazs, 1997) in the Noronha and D'Cruz studies (2005, 2006).

On the positive side, all implementers believed their participation in the retrenchment process would save their organisation and this made them feel it was worth the pain and that some good would come of such a disconcerting task (Noronha & D'Cruz, 2005, 2006).

Negative feelings stemmed from a distaste for one's role (Wright & Barling, 1998), empathy with the employees (Grunberg, Moore & Greenberg, 2004) and a strong sense of helplessness, particularly when they had shared good relations with their employees and contributed to the stress experienced (Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Margolis & Molinsky, 2005, 2006; Noronha & D'Cruz, 2005, 2006; Wright & Barling, 1998).

Their personal and family values also influenced their reactions. Empathising with the employees made the task difficult, yet at the same time facilitated a human touch. Receiving threats and abuse further contributed to negative feelings by evoking a sense of fear in some implementers. The management strategy to show no fear helped the implementers in dealing with this, as further threats seemed to dwindle. Some remarked about fearing for their

families and so they told them only what they needed to know (Noronha & D'Cruz, 2005, 2006).

3.3.6. Guilt Feelings

Having publicly declared what they perhaps have known about privately for some time, implementers had to face those whose lives they were about to have a hand in changing drastically. They experienced a range of victims' emotions from anger, to gratitude, numbness, devastation, denial, worry and fear and they had to attempt to manage their own emotions. The results of the Wright and Barling study (1998) showed that implementers felt compelled to get it over with quickly by being empathetic, but hastily moving onto the next victim. Implementers seemed to vividly remember the experience as if it had happened recently as is illustrated by: "Even to this day I can tell you the names, yes I can even still see their faces" (Wright & Barling, 1998, p.350). They seemed to be profoundly affected by this experience as they embarked on their own "emotional roller coaster" ride. At the end of this ride, one emotion weighed them down more than others, namely guilt. This is supported by Kets de Vries and Balazs (1997) who found that a pervasive sense of guilt was a common response pattern amongst implementers following a retrenchment and later confirmed by Molinsky & Margolis (2006, p.149) who reported that shame and guilt followed when an executive relayed her experience of delivering the message to one of her most trusted employees who had been with the company from the beginning: "the news shocked her, her eyes widened and then filled with tears. I handed her a tissue box before looking away. There was nothing comforting to say. I felt small and incompetent".

Wright & Barling, (1998) suggested that implementers would seem to feel guilty for several reasons:

- Some implementers felt guilt particularly when highly productive employees were being retrenched due to no fault of their own. On the other hand, some implementers at an extreme level experienced contradictory feelings of guilt and relief in that the organisation had finally managed to accomplish a firing under the guise of retrenchment, by

getting rid of unproductive or counterproductive employees. Thus, experiencing the two conflicting emotions of guilt versus opportunity simultaneously or moving between them, frequently made adjustment and understanding the meaning of retrenchment that much more difficult.

- Guilt feelings stemmed from the fact that they knew that this decision affected not only the victims, but their families as well. In this regard, one participant in Margolis and Molinsky's research (2006, p149.) remarked, "it is very difficult from an emotional standpoint knowing you are dealing with somebody's livelihood; dealing with somebody's ego; dealing with somebody's ability to provide for their family".

- They feel guilty because as leaders of the organisation, they wondered whether they could have done something more to change this outcome.

- Some felt guilty because they were on the "inside" of the decision-making process and because of this, they survived.

- They also experienced guilt, as the retrenchment act required implementers to engage in activities on behalf of their employers that may contradict its implicit culture as well as their personal values and self-image. In their research, Brockner, Tyler and Cooper-Schneider (1992) found that further exacerbating the situation was the contradictory message sent by the organisation that had engaged in positive management practices to date (e.g. open communication, participative decision-making or team building) as retrenchments tended to leave the survivors more sceptical and cynical.

- Long after the retrenchment event, implementers still experienced feelings of guilt because they were often reminded of this experience "just by walking through the halls at work" (Wright & Barling, 1998, p.350).

- The most guilt experienced was attributed to the course that they had put others on and being overburdened by the course they had selected for themselves.

Noer's (1993) research explained the complexity of feelings described above in the light of emotional dissonance theory: as managers and executives generally are expected to maintain an orderly and cool exterior it is likely that the tension between feeling guilty and trying to feel in control will produce

emotional dissonance. Middleton (1989) defined emotional dissonance as the conflict between genuinely felt emotions and emotions required to be displayed in organisations. Morris and Feldman (1996) argued that emotional dissonance is likely to have a negative effect on individuals as efforts to manage and suppress these emotions come at a personal cost to implementers. Wright and Barling (1998) add that it would be useful to consider emotions at work such as emotional labour (Morris & Feldman, 1996) and the guilt process (Izard, 1991) in future examinations of this area of emotional dissonance.

3.3.7. Self-perceptions

Implementers reported that their communication style and strategy were important parts of their experience of interacting with both the victims and the survivors. They expressed the need to be able to treat those affected with dignity and spoke of maintaining their own self respect and developing trust through compassionate actions and by ensuring that all their dealings were seen as fair by staff. In this regard, the method of informing victims was critical. Some had received feedback on the way that they had conducted the implementation act and where it was perceived positively they managed to maintain self-respect (Wright & Barling, 1998). Pertaining to this, Knowdell, Branstead & Moravec (1994, cited in Noronha & D'Cruz, 2005) advised that the retrenchment interview be conducted in private and in a business-like manner with only the two concerned people, that is, the implementer and the victim present in a neutral room. This would allow the implementer the opportunity to continue with business at the end of a difficult session, particularly if the victim was in a very emotional state.

Implementers in the Wright and Barling study (1998) revealed that when the way that they had communicated the bad news was perceived negatively, they felt added distress. Despite difficulties associated with retrenching others, implementers also became concerned when their task became too easy. It did not fit well with their self-perceptions.

3.3.8. Role Overload

Within any organisation there is a set of tasks that an individual is expected to accomplish. When work expectations exceed what is reasonable and or possible to accomplish, role overload occurs (Beehr, 1995). Due to increased workload, that is daily duties and the implementation task, implementers suffered from role overload. The consequences of this are well documented, where it has been found to foster job dissatisfaction, fatigue and low job involvement (Beehr, Welsh & Taber, 1976), interference with family functioning (Stewart & Barling, 1996) and withdrawal behaviour at home (Repitti, 1989).

Implementers also distanced themselves from the retrenchment experience by "running", that is working harder. They "run" faster to escape the guilt that they felt (Molinsky & Margolis, 2006), to hide from their emotions by burying themselves in their work (Wright & Barling, 1998) and to escape from fear that they may be the next one to be let go (Grunberg, Moore & Greenberg, 2004) by working harder than ever before (Wright & Barling, 1998). They furthermore increased the pace of work because besides their daily workload, they had expanded duties. They had more direct reports, increased tasks and increased demands for productivity, even though they had to do more with less resources (Molinsky & Margolis, 2005; Wright & Barling, 1998). Additionally, implementers also felt that they owed it to those separated to continue to get their work done and to justify the retrenchments: "Psychologically you have to…the feeling is that you owe it to the people you let go to ensure that all their jobs get done" (Wright & Barling, 1998, p. 350).

Long beyond the retrenchment, implementers are still "running hard" as they still felt obligated to. Within a short space of time they had affected many lives: the victims, their families, the survivors and their own (Wright & Barling, 1998).

Some implementers continued to describe that they knew just how overloaded they were, whilst others only realised it in retrospect (Wright & Barling, 1998). In addition to working longer hours and having expanded duties,

implementers also shouldered the responsibility for getting the survivors through this difficult time (Hancock, 1995).

3.3.9. Role Conflict

Wright & Barling's (1998) study supported earlier research (Kopelman, Greenhaus & Connolly, 1983) that the stress brought on by the retrenchment carried over into the implementers' family role and leisure time. Guilt and role overload played a guiding and causal role where lingering guilt at work began to spill over at home. Engaged by this negative emotional state, where guilt is experienced as tension, anxiety, depression and remorse (Stein, 1996), the implementers' general outlook took on a dark view. Family members, confronted by this negativity, pessimism and/or withdrawal, were initially confused. With time, however, they began to challenge implementer actions or seeking understanding and resolution, but because of the implementers' emotional state, they were unaccommodating. Family relationships therefore suffered (Wright & Barling, 1998).

Implementers' workloads and thus longer work hours also put family relationships at risk due to the extra time spent at the office at the expense of family time. Even if there was time available, implementers were too drained, physically to do anything (Stein, 1996). Because of lingering guilt and added work pressures, conflict developed between work and family roles and they were left wondering whether anyone cared about the price they were paying in terms of work and family role conflict (Wright & Barling, 1998).

3.3.10. Decreased Wellbeing

Wright and Barling's research (1998) also showed a link between being involved in retrenchment and decreased personal wellbeing. Some implementers reported taking mild sedatives to help them sleep, others complained of being physically exhausted from work, while others reported that they were smoking and drinking more. Most complained about feeling poorly. Grunberg, Moore and Greenberg (2004) supported this and found that implementers experienced increased health problems and complained of sleep disturbances, even to the point of seeking treatment for these problems.

Another part of experiencing decreased wellbeing and personal strain related to the fear that the victims' emotional reactions evoked. Barling (1990) referred to the threat of personal violence and/or damage to company property that sometimes followed a retrenchment. This is supported by findings in the Noronha and D'Cruz case studies (2006, 2005) where victims responded with threats and personal abuse to the harsh tactics employed by the implementers. Levinson's research (1981, cited in Wright & Barling, 1998) also focused on the experience of emotional burnout in implementers when they were exposed to the risk of attack for doing their jobs. They were faced with deep emotions, carried enormous burdens and felt that no one really knew, let alone cared, about the price they were paying.

Implementers who continued to work long hours under unrelenting pressure and continuously faced with conflicting interests, ran the risk of emotional exhaustion, finally resulting in burnout in some cases (Grunberg, Moore & Greenberg, 2004). Kets de Vries and Balazs (1997) found that implementers suffered decreased wellbeing, reporting feeling dizzy and anxious; some felt that they were going insane and many had disturbances in their sense of time and space. Some complained of suffering from insomnia, weight loss was common and sexual interest decreased.

3.3.11. Organisational and Social Isolation

One of the consistent lessons offered by social and behavioural research in the 1980's is the importance of and positive role played by social support for personal wellbeing and functioning (Cohen & Wills, 1985). Despite this, implementers (Wright & Barling, 1998) reported feeling extreme levels of isolation, both inside and outside of the organisation. In their view, isolation within the organisation potentially stemmed from factors such as guilt, role overload (which limited time available for any social interactions) and survivor hostility and ambivalence (O'Neill & Lenn, 1995). Implementers recognised this as a natural result of their involvement. To counter this intra-organisational isolation, they turned to other implementers within and outside of their organisation for support. According to Jackson (1988, cited in Wright &

Barling, 1998) when this occurs, the contents of the discussion is customarily around the retrenchment, which may in some cases be counterproductive as individuals finding themselves in such stressful situations also needed access to less intense relationships and discussions.

Implementers also experienced a degree of social isolation due to their experience of work overload, emotional overload and the fact that in some cases they carried knowledge that they could not necessarily share with anyone; hence the feeling that it was easier to isolate themselves (Molinsky & Margolis, 2005; Wright & Barling, 1998).

Implementers tended to withdraw at home, because of this unresolved conflict. Being tired of the challenges at work and hence too tired to tackle problems at home, they were too tired to do much else. This resulted in those closest to them mirroring the behaviour and, in some instances, also withdrawing. Without support from this extra-organisational network, they experienced an even deeper sense of social loneliness (Wright & Barling, 1998).

3.3.12. Job Insecurity

Operating in an environment where retrenchments were being conducted, that is, having retrenched their direct reports as well as the accompanying emotional trauma, heightened feelings of uncertainty (Buch & Aldridge, 1991; Cascio, 1993). This magnified the perceived risk or perceived threat of a similar occurrence happening to them (Grunberg, Moore & Greenberg, 2004; Wright & Barling, 1998). Both the latter studies also showed that such feelings contributed to a desire to leave the organisation to seek out a more secure work environment. Grunberg et al. (2004) postulated that implementers expressed a desire to leave the organisation to escape the intense emotional discomfort associated with implementing retrenchments. Their findings supported evidence in earlier research on the role that emotional exhaustion plays in turnover intentions (Lee & Ashforth, 1996, cited in Grunberg, Moore, & Greenberg, 2004).

3.4. Delivering the Message: Dysfunctional Conversation Types

The experience of actually delivering the retrenchment message unleashed a surge of emotions, catching implementers by surprise. These emotions derailed implementers from the path they had been trained to follow. According to Molinsky and Margolis (2006), in their attempts to regain emotional equilibrium, some implementers strayed into what is termed as "dysfunctional conversations", a summary of which is shown in Table 2 below. Dysfunctional conversations varied from one extreme to another, where implementers either pandered to their own emotions or they shut down their emotions entirely. By pandering to felt emotions, implementers risked straying into one of the counterproductive dysfunctional conversations, namely bargaining, cushioning, unloading or arguing. On the other hand, by shutting down/out their emotions, implementers risked mechanising the retrenchment conversation, producing behaviour that is overly rigid and robotic-like. Any of these behaviours undermined fair, sensitive and respectful treatment.

Table 2. Dysfunctional Conversation Types

Conversation Type	Description	Emotional Trigger	Outcome
Bargaining	Manager negotiates details of the retrenchment and offers special accommodations	Sympathy, Guilt, Anxiety	Jeopardise consistent treatment across all employees
Cushioning	Manager softens the news of the retrenchment to relieve employee's distress.	Sympathy, Guilt, Anxiety	Message not delivered and subsequent delivery generates worse feelings
Unloading	Manager is overwhelmed by emotion and relieves it by releasing it during the retrenchment meeting	Guilt, Sympathy, Anxiety	Message not delivered. Sensitive treatment not accorded
Arguing	Manager fights back when employee confronts or blames	Anger, frustration	Sensitive treatment not accorded
Mechanising	Managers relieves own distress by delivering message rigidly or rapidly	Guilt, Sympathy, Anxiety	Sensitive treatment not accorded

(Molinsky & Margolis, 2006, p.150)

In the interest of rigour, a short elaboration is provided, with examples from literature case studies on the dysfunctional conversation types.

Bargaining

A common suggestion is to avoid negotiations at all costs during a retrenchment conversation. Bad news is never pleasant, but it is even worse when badly delivered (Molinsky & Margolis, 2006). Although implementers knew that they were not supposed to bargain with affected employees, they still found it difficult to avoid negotiations, especially when employees where highly persistent as was the case in Noronha and D'Cruz (2005, p. 150). In these instances, managers tried to avoid having what they termed "but why" conversations. To avoid negotiations, "it was critical to get the words 'final decision' out in your first breath, because if you don't, people want to bargain". LaBaugh (cited in Odendahl, 2001) concurred and suggested that implementers kept the message concise and compassionate, but also held firm that the retrenchment was a final decision.

Molinsky and Margolis (2006) continued to add that the implementers in their study found that victims tended to persist negotiating around issues like the amount of time they could take to gather their things before leaving the premises or whether they could complete a project that they were busy with. Contemplating these acts of accommodation would seem like a natural extension of caring and compassionate treatment and also seemed like a minor request and an especially convenient way for implementers to express sympathy and soothe their own guilt, but these gestures also undermined the organisation's efforts to administer a consistant approach which is vital for victims' and survivors' sense of fairness. Moreover and what is potentially worse, rather than calming raw emotions of the victims, these special gestures stirred up more intense negative feelings, when they inevitably were repealed in the name of consistant and fair treatment across the board for all. As one manager in the case study remarked: "by acting out on your own you actually cause more pain and suffering for the person than you do good" (Molinsky & Margolis, 2006, p.151).

Cushioning

Attempts at cushioning the blow ended up confusing the victim and prolonged the agony (Molinsky & Margolis, 2006). Best practice research suggested that approaching the negative news in a more indirect fashion left the victim unclear of the contents of the conversation and resulted in unintentionally delaying the inevitable, making the message ultimately more difficult to communicate and for the employee more humiliating (Dubose, 1994; Molinsky & Margolis, 2006; Watters, 2004).

Unloading

According to Molinsky and Margolis (2006), although unloading emotion before and after a retrenchment conversation was touted as a useful means of coping, unloading during the conversation was considered inappropriate and dysfunctional, as it would indulge the implementer's emotions rather than those of the affected employees. Watters (2004) supported this and suggested that implementers worked through some of their emotions in anticipation of the retrenchment meeting, thereby ensuring that their emotions would not become the focus of attention during the meeting. This minimised the danger that the message was not delivered and the victim being treated in an interpersonally insensitive manner. Molinsky & Margolis (2006, p.152) continued to add that in some instances in their case study, implementers struggled to prohibit unloading their emotion as is illustrated by the following remark: "I had recruited her from another stable job and had to retrench her when the new division was abruptly closed…I literally cried when terminating my employee".

Arguing

Implementers were especially vulnerable when victims responded with anger and outrage to the negative news. Participating in the argument is inconsistent with how implementers are expected to treat victims as this not only undermined fair treatment efforts (Molinsky & Margolis, 2006), but also increased risks of retaliatory acts by victims as was reported in the Noronha and D'Cruz studies of 2005 and 2006.

Furthermore because some of the implementers were unable to maintain their composure when it was most critical to do so, it left them feeling incompetent as a manager (Molinsky & Margolis, 2006). In this regard, LaBaugh (cited in Odendahl, 2001) and Watters (2004) suggested that expressing regret was acceptable and preferred over apologising as it encouraged further angry discussion from the victims.

Mechanising

Instead of indulging their emotions as described before (i.e. bargaining, cushioning, unloading and arguing), highly emotional implementers were also prone to detach or distance themselves from their emotions and delivered the retrenchment news in an awkward, rigid and mechanistic style. An example of this is cited where the executive of a start-up company described how emotional overload caused her to deliver the message in this way: "The carefully rehearsed words didn't flow smoothly and instead I came out sounding like an Al Gore campaign speech" (Jeffrey, 2001, p.5). Another example in Molinsky and Margolis (2006, p.153), shared the story of a senior executive who "…instead of looking the employee in the eye…looked down and mechanically read from the retrenchment script".
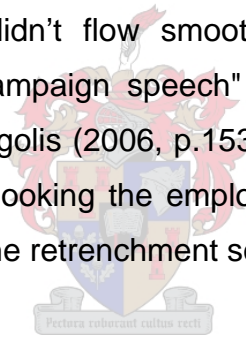
3.5. Delivering the Retrenchment Message: Coping Techniques

Implementers tend to rely on coping techniques or behaviours to reduce the dysfunctional effects of their emotions, thereby assisting them in maintaining composure and treating victims with interpersonal sensitivity and respect during the retrenchment conversation.

Lazarus and Folkman (1984, p. 15) define coping as "the cognitive and behavioural efforts to manage specific external and/or internal demands that are appraised as taxing or exceeding the resources of the person". According to Shaw and Barrett-Power (1997, p. 118) "coping strategies may focus on solving the actual problem causing the stress or on alleviating the emotional consequences of the stressful situation". In this regard, Lazarus referred to problem-focused coping and emotion-focused coping, the latter indicating withdrawal from the situation (Shaw & Barrett-Power, 1997). From the

literature discussed thus far, it is clear that implementers suffer too (Molinsky & Margolis, 2006) and in an attempt to cope, managers often became abrasive, narcissistic, withdrawn, alienated, apathetic or depressed. Many blamed themselves for the harm that they have caused others (Kets de Vries & Balazs, 1997). Noronha and D'Cruz (2005, 2006) and Wright and Barling (1998) argued that in the absence of being able to control the situation, implementers largely relied on emotion-focused strategies to cope with their experiences. That is, they relied on mechanisms to alter their view of the situation, without actually changing the situation. Molinsky and Margolis (2006) supported this. They found that those implementers who were able to regulate their emotions (i.e. via coping techniques that helped reduce the intensity of the experienced emotion), neither indulging nor stifling them, enabled them to implement the task, maintain composure and treat the victims with interpersonal sensitivity and respect. Their research on these emotion-focused coping strategies is depicted in Table 3, below. Following the table is a brief discussion with case study examples cited in the literature of the four types of emotion-focused coping strategies employed.

Table 3. Manager's Coping Strategies

Coping strategy	Description	Illustration
Justifying one's actions	Providing oneself with a convincing justification for one' actions in order to reduce guilt and personal distress.	"I look at the job market. It's hot right now. A lot of people here are young and even the outplacement people have told us that they are employable…they almost made us feel better about it…about what we were doing…"
Quarantining emotion	Distancing oneself from one's emotions in order to deliver the difficult message.	" I find it's personally easier to put the emotions on the back burner. I'll deal with them prior to or after the fact, but during the meeting, I am there to do a job and I just focus on my performance and get the job done..."
Releasing emotion	Exhaling, or releasing, negative emotion to prepare for, or help recover from a difficult conversation.	"Misery loves company, if you feel that other people are experiencing the same types of pain you are feeling, just to talk about it and talk about how the process makes you feel, and we are going to be done by 1:00pm so lets aim for 1:00pm then we can all take a deep sigh of relief…"
Diverting attention	Focusing on something other than one's own distress or that of the affected employee in order to facilitate delivery of the negative message.	"If I don't have a checklist per se or even a mental checklist I think I would definitely have forgotten because you're anxious and you might start to get to a point and they might cut you off with something else, then you just forget what your point is…"

(Molinsky & Margolis, 2006, p.154).

Justifying

Providing justification for one's actions helped reduce the guilt and personal distress implementers felt about causing pain to others (Molinsky & Margolis, 2006). In their study, implementers justified their actions by for example focusing on the retrenchment as having a "silver lining" for the victims, believing that they often end up getting even better jobs at other organisations. Implementers in related research agreed with this, remarking on seeing opportunities within the dark clouds of retrenchment: "You can make lemonade from lemons" (Klinger, 2003, p.32). A further example of the silver lining justification is found in the research study on retrenchments at a financial firm (Clair & Dufresne, 2004), where implementers expressed feeling comfortable with retrenching others as they where providing opportunity for the affected to get to their next position in a new company.

Other implementers in Molinsky and Margolis (2006) and Noronha & D'Cruz (2006) also justified the retrenchment as a necessary part of their role, suggesting that even if they strongly disagreed with the decision being made, they had no choice, were tasked with the job and needed to carry it out. In this context, Molinsky and Margolis (2005, p. 245) state that retrenchment is often legitimised as a "necessary evil", "where an individual must as part of their job, perform an act that causes emotional or physical harm to another human being in the service of achieving some perceived greater good or purpose".

Although justifications and rationalising were useful to lessen the guilt of implementers, Molinsky and Margolis (2006) referred to a potential downside, where justifications potentially reduced the level of empathy they felt for victims, which in turn could result in less compassionate treatment.

Quarantining emotions

Intentionally and temporarily distancing oneself from the onslaught of negative feelings was another means of emotion management. Implementers in Molinsky and Margolis (2006, p.155) suggested that quarantining was an intentional strategy used to regulate their emotion so that they could be emotionally available for the affected employees and treat them with

sensitivity: "I've definitely taken a step back and tried to remove myself emotionally from the meeting and the conversation, yet maintaining enough empathy with the person to be able to make them feel like they have been treated with dignity and respect". They continued to add that the danger with quarantining was that it could deaden implementers' sensitivity and lead to rigid script-reading or callous treatment. This was particularly highlighted by Watters (2004) who added that if the implementation act became easy, implementers were at risk of losing that sense of empathy and harks back to the mechanising dysfunctional conversation type mentioned previously.

Releasing emotions

Implementers maintained that support from others, before and after retrenchment conversations, like their peers not only provided occasion to ventilate and share their experiences and emotions, but also provided opportunity to learn how to handle different and difficult situations and allowed for recovery for the next conversation. Peers also played a key role in supporting implementers, particularly with regard to threats, abuses and assaults from victims (Noronha & D'Cruz, 2006). Some implementers spoke of heaving a "collective sigh of relief" following a difficult set of conversations (Molinsky & Margolis, 2006, p.156).

The disadvantage to expressing negative emotions before or after to others, was that it in some cases increased rather than decreased an implementer's stress level, particularly if they felt that maybe they had not done the right thing. Moreover those implementers that struggled to refrain from releasing emotions during the retrenchment conversation resulted as mentioned before in a shift in focus from the experience of the victim to that of the implementer (Molinsky & Margolis, 2006).

Some implementers spoke of seeking professional counselling in a bid to vent emotions and deal with the distress created by the enactment of the retrenchment task (Grunberg, Moore & Greenberg, 2004).

Implementers also cited support from various other areas, such as family members and senior executives in the organisation. With regards to senior management support, implementers in the Molinsky and Margolis (2005) case study were unanimous that the Managing Director of their organisation provided the greatest support in that he met with the implementers on a daily basis, discussed the various issues facing the organisation and the problems they faced with implementing the retrenchment. He assisted with finding solutions to problems and was concerned for their personal safety and that of their families. In the case study of Noronha & D'Cruz, (2005, p. 91), the Director of Personnel and Industrial Relations, "personally supervised operations by controlling and coordinating the effort and dealing with hard-core employees. Once we had his support, we required nothing else".

Diverting attention

Molinsky and Margolis (2006) found that implementers also coped by focusing their attention away from the felt negative demands and emotions. In this regard, some implementers focused on the retrenchment script provided by their organisations. Other best practice authors supported this and suggested that a carefully planned script is invaluable in dealing appropriately with both sets of emotions, that is, that of the implementers and those of the victim. They continued to suggest that deciding ahead of time what will and will not be said, would serve to assist the implementer in handling the meeting with more confidence (DuBose, 1994; Odendahl, 2003; Watters, 2004).

Further research suggested a focus of attention towards non-work related areas of their lives such as families, leisure activities, hobbies and spiritual sources (Molinsky & Margolis, 2006; Noronha, & D'Cruz, 2006; Stein, 1996).

As is the case with the other coping strategies mentioned before, diverting attention had a potential downside too in that implementers ran the risk of paying too little attention to the needs of the victim and so could appear disinterested and less able to respond to the needs of the employee (Molinsky & Margolis, 2006).

3.6. Enabling Strategies

It is clear from the discussion so far that researchers on organisational justice have documented the wide-ranging benefits of following fair procedures and ensuring that they are conducted in an interpersonally sensitive manner when "necessary evils" are performed (Donovan, Drasgrow & Munson, 1998, cited in Molinsky & Margolis, 2005; Mikula, Petrik & Tanzer, 1990).

Various authors have suggested that a critical factor in the retrenchment process is the emotions of the implementers themselves and the challenges that they are faced with when attempting to produce interpersonally sensitive behaviour (Kets de Vries & Balazs, 1997; Mishra, Spreitzer & Mishra, 1998; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2005, 2006; Wiesenfeld, Brockner & Thibault, 2000). It is also clear that the experiences of implementers may hold the key to ensuring fair and compassionate treatment of the affected employees (Folger & Skarlicki, 2001; Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2005, 2006; Stein, 1996; Wright & Barling, 1998).

These authors furthermore hold the view that while organisations mostly prescribed fair and dignified treatment as an essential quality of the retrenchment process, they do not do enough to prepare the implementers to handle the emotional dynamics essential for delivering this form of treatment. And if effective, consistant and strong leadership is vital to the organisation's success post the retrenchment period, then it behooves organisations to proactively prepare the implementers by way of enabling strategies for the challenges they may face in handling these conversations instead of leaving their managers to their own devices for coping with their emotions. What follows are suggested examples of the role that organisations can play in providing assistance and support in this regard.

3.6.1. Acknowledge the Role of Emotions

Molinsky and Margolis (2006) suggested that a first step towards preparing implementers to handle their own emotions is to acknowledge the role that emotions play in delivering the retrenchment message. In their case study

they noted that a mere half a percent of the training material prepared for the implementers had anything to say about their own emotions. Watters (2004) concurred and suggested that implementers found some time to reflect on how they felt about their task. Part of this required implementers to think about their typical reactions.

3.6.2. Provide Realistic Simulations of Emotional Dynamics

Organisations are starting to pay attention to the importance of training for retrenchment conversations (Molinsky & Margolis, 2006). Training should not only focus on the legal requirements adhered to; it should also explain how to communicate the retrenchment announcement empathetically and convincingly. It should provide the implementers with skills and opportunities for practice in telling victims that they will lose their jobs (Mishra, Spreitzer & Mishra, 1998).

Moreover, the methodology or way that implementers are trained is critical to the success of the retrenchment initiative. Training should provide a realistic preview, not only exposing implementers to the range of emotions victims will experience, but also the true stressors and emotions that they as implementers will likely experience in real conversations with employees. To this end, Molinsky and Margolis (2006) continue to suggest that the training include role-plays with actors or even retrenchment victims and perhaps videotapes of them portraying their reactions during a retrenchment conversation. "Perhaps a pale comparison to the real event, but such an approach would alert implementers to the storm they might experience and furthermore allow the implementer to gauge their emotional reactions to a milder version of what they may encounter" (Molinsky & Margolis, p.157, 2006).

3.6.3. Customise Training

By customising training to fit the implementers' experience levels, as well as the difficulty of the situations they face, organisations can increase the likelihood that they will be able to achieve the standards of dignified interpersonal treatment. Implementers with limited experience may have a great deal of difficulty managing their raw emotions. In contrast, seasoned

managers may have an opposite problem, in that they may become so numb to the situation that they become persistently detached from their emotions as explained by one implementer in Molinsky and Margolis (2006, p.158): "If you have done it as long as I have, the challenge is that you focus on the job so much that it is the individual that you ignore and it can become cold, you can just race through the process. If this is the first time you have done it, you can be so caught up in the sympathetic role that one must play that you are not able to convey the message. So it is striking a balance between the two extremes".

3.6.4. Coaching

Schroeder (retrieved August, 31, 2006) suggested that in addition to training programmes, it is vital to individually coach implementers to avoid mistakes that threaten to translate an organisation's "bad time" into the label of "bad company". According to Douglas Pugh, Assistant Professor of Psychology at San Diego State University in the same article: "There is growing evidence that the specific manner in which employees are notified about lay-offs and terminations is directly linked to the number of wrongful termination claims made against companies. Manager coaching will equip implementers to anticipate and prepare for typical reactions of employees, to tailor their own behaviour and to avoid legal action by separated employees" (Schroeder, retrieved August 31, 2006, p.100). Table 4 below provides examples of coaching advice to this effect.

Table 4. Conducting a Termination Meeting

DO	DON'T
• Get right to the point	• Engage in small talk
• Explain the actions taken and the reasons	• Use humour
• Listen to the employee and wait for a response	• Be apologetic
• Restate the message if necessary	• Defend, justify or argue
• Use your prepared notes/guidelines	• Threaten
• Clarify the separation date	• Discuss other employees
• Give an overview of the separation package	• Try to minimise the situation
• Explain the logistics for leaving the company	• Make promises
• Provide appropriate written materials	• Personalise the anger
• Close the meeting within 15 minutes	• Use platitudes like 'I know how you feel'

(Schroeder, retrieved August, 31, 2006, p.100).

3.6.5. Counselling and Support

According to Mishra, Spreitzer and Mishra (1998) implementers often needed counselling and support in dealing with their own guilt and stress. Some organisations made use of external assistance from Employee Assistance Programmes service providers who supplied training and coaching for employers to enable them to carry out the difficult task of informing individuals of job loss (Modise, 2002). What is not clear in the literature is whether enough is done to debrief and counsel implementers on their experiences. In Appelbaum and Donia's (2001) view, debriefing for implementers is vital as it can allow managers responsible for implementing the programme to ventilate and dissipate their feelings in a safe and appropriate setting.

Insofar as organisational support is concerned, the literature on how employees cope with work stress, suggested that social support generally acted as a significant buffer against work stress (Cohen & Willis, 1985). Wright and Barling (1998, p. 352) found that participants in their study were uniform in pointing out that they received no support from their organisations and that they experienced social isolation within their organisations. They concluded that in their view organisations needed to acknowledge that "people charged with the responsibility of laying off other people need some form of assistance" and proposed formalised social support mechanisms like pre-retrenchment training and support for the implementer and their families.

In their work on the role of organisational support for the survivors of retrenchment, Naumann, Bies and Martin (1995, p.89) define organisational support in this context as "the degree to which an organisation takes care of its employees". In their view, a link existed between organisational support and survivors' coping strategies, that is, individuals who were employed in organisations which had proven to be supportive in the past evaluated changes as less threatening and stressful and therefore were able to rely on control-orientated coping strategies. While the work of Naumann et al. (1995) is focused on the survivors of retrenchment, it could be argued that the implementers also form part of this category of stakeholder and so organisational support through the retrenchment process itself is also likely to

be important in relation to, for example, the type of coping strategy which implementers will adopt. Since implementers do not have control over having to enact the retrenchment task, the aim of such organisational support would likely be on emotion-focused coping, thereby assisting in alleviating the emotional consequences of the stressful situation. In addition, while Naumann et al. (1995) argues that the most important and most likely source of this type of support would be the survivors' line manager, it could be argued to be as applicable to the surviving manager tasked with the implementer role. The participants in Noronha and D'Cruz (2005) and Molinsky and Margolis (2005) case studies would seem to have experienced this form of organisational support.

3.6.6. Personal Preparation

It has been argued that implementers having to implement the retrenchment have a tough task. What originated as a business decision rapidly becomes a life-changing event for the victims, some of who may be the organisation's highest achievers. Personal preparation is therefore key for the implementer (Schroeder, retrieved August, 31, 2006). DuBose (1994) suggested that they allowed time to plan, organise and practice the steps for the retrenchment interview, which should improve their ability to handle their own emotions and victim reactions to bad news. Schroeder (retrieved August, 31, 2006) concurred and added that in their personal preparations, implementers may find it helpful to draft a short, concise script for the retrenchment meeting, containing key messages, explaining the challenges facing the organisation and the rationale behind the decision to retrench. Similarly, implementers must ensure they did not assume personal responsibility for the decision; it is a business decision based on business needs. Implementers should be prepared to answer any questions (Mishra, Spreitzer & Mishra, 1998) and all the information should be available in writing beforehand, including, for example, the notification letter, severance package and benefits (Bendix, 2003). Implementers should also be prepared and ready to be able to explain next steps to victims, which included, for example, information on when the victim is to collect their personal belongings, whether they should return the following day or work another few weeks, information about outplacement

assistance or Employee Assistance Programmes services if it has been arranged, and being sure to indicate that the organisation has paid for these services (LaBaugh, cited in Odendahl, 2003). If it is appropriate, implementers should have arranged to have an escort for the victim. According to Dubose (1994), appropriate situations might be when, regardless of the reason for retrenchment, the safety of person(s), equipment or information is at risk. The company's security officer, selected managers or co-workers typically act as escorts. According to Schroeder (retrieved August, 31, 2006) such careful planning has been shown to increase implementers' confidence.

3.7. Summary

It is imminently clear from the literature that the experience of delivering a retrenchment message unleashes a flood of emotions that may render the implementer overwhelmed. It is also clear that despite their crucial role in retrenchment processes, researchers, models and best practice guidelines have largely neglected those experiences of the implementers.

The importance of understanding the implementers' experiences in the context of the emotional challenges they face is becoming increasingly relevant, particularly since retrenchment is an ever-increasing phenomenon in the world of work today. In this regard a limited but nonetheless clearly present and applicable number of emerging themes were identified from the literature overview. The procedural experiences with regards to being convinced of the need to retrench, the procedures followed to initiate the retrenchment programme, target setting, role preparation, voluntary and involuntary retrenchment and post retrenchment follow-up processes were discussed. With reference to the personal experiences of the implementer, themes relating to the managing of organisational expectations, the experienced felt demands of sharing the bad news with interpersonal sensitivity and coming to terms with their role were discussed. Also included were their experienced feelings to the news of the retrenchment, their experiences of victim and survivor reactions, perceptions of self, experiences of guilt, a sense of responsibility, role overload and role conflict, feelings of

decreased personal wellbeing, organisational and social isolation and job insecurity.

In addition, the dysfunctional conversation types and typically emotion-focused coping techniques implementers employ in their efforts to emotionally cope in not only performing the retrenchment act, but also to do so in an interpersonally sensitive manner was discussed. The role that organisation's could proactively play in preparing and assisting implementers for this emotionally taxing task was also discussed.

In the following chapter (Chapter 4) the research methodology, pertaining to the qualitative research paradigm, is discussed.
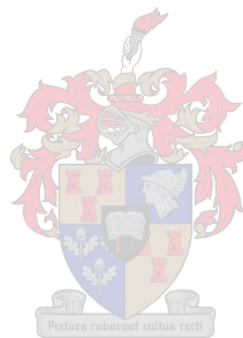
CHAPTER 4: RESEARCH METHODOLOGY

4.1. Introduction

In the present study the qualitative research paradigm is utilised. The Chapter commences with a discussion of the qualitative research paradigm, including the phenomenological-hermeneutic approach.

Also included in the chapter is a detailed discussion of the qualitative interview method as data collection method, as well as data analysis and issues relating to the quality of the research methodology.

4.2. Qualitative Research Methodology

Denzin and Lincoln (1994) define qualitative research as a multi-method in focus, involving an interpretive, naturalistic approach to its subject matter. Qualitative researchers thus study things in their natural settings, utilising different qualitative techniques and data collection methods and attempt to make sense of or interpret phenomena in terms of the meanings people bring to them. Qualitative research methodology is appropriate for the present study in so far as it focuses on uncovering the meanings ascribed to the subjective experiences of the participants as was lived and undergone by them.

This methodology therefore focuses on the subjective meanings, metaphors, definitions, symbols and descriptions of specific events and experiences from the participants' point of view in an attempt to capture and record their impressions of the social world in the form of written or spoken language, including words, tone and gestures (Neuman, 1997; Terre Blanche & Durrheim, 1999). It uses language as a tool through which fluid reality is investigated and therefore uncovered (Punch, 1998; Winegardner, 2001).

Qualitative research focuses on an inductive approach to knowledge generation where theories and principles are generated from data collected through observation and intuitive understandings gained in the field (Punch, 1998; Winegardner, 2001). The present study made use of this inductive approach as abstract themes and eventual propositions were generated

through the employment of interviews, thus providing the researcher with a comprehensive understanding of the various issues raised in view of the experiences of the participants.

Since qualitative research seeks to gain an in-depth or insider perspective into the phenomenon under investigation, the researcher of the present study sought to immerse herself into the subjective life-world of the participants in order to understand the world through their lenses (Winegardner, 2001). This potentially raised the question around subjectivity of the researcher's perspective. As will be noted further on, this was dealt with by being aware of her biases and presuppositions regarding the research area.

Thick descriptions of the experiences of participants were achieved by interviewing them in their natural setting, namely the workplace. Qualitative research usually requires fieldwork where the researcher enters a field such as a setting or institution in order to observe the behaviour and actions of participants within their natural setting. Entering the field therefore allowed the researcher to obtain rich descriptions of the phenomenon under study and satisfied the objectives of an exploratory study where the researcher attempted preliminary investigations into unknown areas (Neuman, 1997; Terre Blanche & Durrheim, 1999; Winegardner, 2001).

Unlike the quantitive researcher, the qualitative researcher focuses on subjective meanings, definitions, metaphors, symbols and descriptions of specific cases and attempts to capture aspects of the social world for which it is difficult to develop precise measures expressed as numbers as is the case with quantitive research (Neumann, 1997).

The following section focuses on the ideology underpinning the present study, namely the phenomenological-hermeneutic approach.

4.3. The Phenomenological-Hermeneutic Approach

Within the qualitative tradition, a phenomenological research method was chosen for this study. A congruent approach with qualitative research, this

ideology is well suited to the present study as it enabled the researcher to understand the meaning of experiences as understood by the participants.

Phenomenology regards the context in which human experience occurs as important (Kruger, 1998). Human experience and behaviour are always linked to the living world of the individual and every human experience is linked to the situation in which the person lives. Thus, "the commitment to understanding human phenomena in context, as they are lived, using context-derived terms and categories, is often referred to as the phenomenological perspective" (Terre Blanche & Kelly, 1999, p.26). Phenomenology does not view individuals as organisms that react to stimuli but as organisms that perceive or experience reality in unique ways. It also accepts that every human being experiences his or her living world in a unique and non-repeatable way and that he or she is also affected in a unique way by the phenomenon.

An important feature of adopting the phenomenological approach is to practice phenomenological reduction, which requires being cognisant of and critical about one's presuppositions, preconceptions and prejudices concerning the outcome of such research (Sokolowski, 2000). This process entails bracketing one's fore-structure of understanding so as to develop awareness for ones taken-for-granted assumptions, characteristic of the natural attitude (Kvale, 1996). In view of this study, note was taken of the following presuppositions.

Firstly, a presupposition that the experiences of the participants would reflect a negative impact on the participant and their organisations and secondly, a presupposition that this experience would be perceived by the participants as traumatic both personally and as related to the workplace.

While the phenomenological component of research focuses on the participants' lived experience as an implementer, the hermeneutic component of inquiry focuses on interpreting the phenomenon, firstly from the perspective of available literature, then by allowing the descriptions of the phenomenon to

assert their meaning (Terre Blanche & Durrheim, 1999). Through this approach, interpretive analysis involved building up a web of interpretation from text and theory which both provided a more accurate and superior account of the experience of the participants.

To this end, the phenomenological-hermeneutic approach was seen as being appropriate and best suited to gather an authentic understanding of the participants' experiences. This study aimed to describe the phenomenon as the individual in his or her lived world experienced it, namely the procedural and emotional experiences of the participants.

The following section outlines the research methodology employed in the study.

4.4. Methodological Approach

According to Choudhuri, Glauser and Peregoy (2004), as part of establishing trustworthiness or validity, the author must present an explicit description of the data collection process, including amongst others a clear articulation of how the participants and/or sites were selected, the kinds of questions asked and the documentation of observations. It is also helpful to include information on the actual amount of time spent on interviewing or observing as well as the total length of the study. There also needs to be some form of dependability or reliability through the articulation of for example triangulation, reflexive journaling, multiple viewpoints and sources and length of engagement with the participants (Snow & Thomas, 1994).

4.4.1. Sample Population

According to Leedy (1997), participants are chosen because they are likely to be knowledgeable and informative about the phenomenon the researcher is studying. Kruger (1988, p.150) discusses four qualities of participants who are pre-eminently suitable for partcipating in phenomenological research:

• Participants who have experiences relating to the phenomenon to be researched.

- Those who are verbally fluent and able to communicate their feelings, thoughts and perceptions in relation to the researched phenomenon.
- Those who have the same language as the researcher, since this will obviate the possible loss of subtle semantic nuances owing to the need to translate from one language to another.
- Participants who express a willingness to be open to the researcher.

All the participants in the sample population of South African managers met the requirements of the aforementioned qualities.

4.4.2. The Sample

According to Streubert, Speziale and Carpenter (2003, cited in Vishnewsky & Beanlands, 2004), the sample size is rarely pre-determined. Instead researchers aim to include as many participants as necessary to gain a comprehensive understanding of the phenomena. The sample size was to be limited because the study design required semi-structured interviews to be administered by a single researcher. A sample size of 25 different participants was determined to be appropriate in the qualitative context. The participants were selected across industry categories with the aim of obtaining the participation of organisations of comparable size with a variety of orientations to retrenchment implementation.

The researcher approached client organisations as well as using a South African-based Internet HR Forum, with a request for potential research participants. In the case of the client organisations, the Human Resources Managers of these organisations were notified of the research intentions and provided with an information page, documenting the objectives of the research and assurances pertaining to voluntary consent as well as anonymity (see Appendix A). Also included in the information page was a guide of the semi-structured questions that would be asked (see Appendix B). In the case of the Internet HR Forum, the researcher provided the same information.

The participants for the study consisted of participants that were self-selected. In other words, in the case of the Internet HR Forum, only those who were interested responded to the request for participants. In the case of the client organisations approached, the Human Resources Managers of these organisations announced the study to their managers and so only those who indicated interest, were to be contacted.

Upon receiving clarification of the purpose and use of the research study, fifteen potential participants identified themselves as having an interest in being interviewed. Of these, seven participants came from the Internet HR Forum and eight from the client organisations. These fifteen participants were initially contacted by email or telephonically, as the case may be, to further gauge their interest in partaking in the study. This was followed up with an email, restating the study's aims and objectives. The same information page as mentioned previously was provided to them. Ten individuals responded via email, and five responded telephonically confirming their willingness to participate. In the case of one of the participants, further clarification was requested to aid his decision to participate or not. To facilitate this participant's decision, the researcher followed the advice of Burns and Grove (2003, cited in Vishnewsky & Beanlands, 2004), who suggest that qualitative studies require the researcher to develop a very different relationship with the participants as opposed to quantitive studies. The researcher must approach the subject as a "collaborator" and an equal in the research process, as it is the support and confidence of these individuals that make it possible for the research to be completed. Therefore, upon further clarification and guarantee of anonymity, the participant consented to participate.

The researcher furthermore followed the guidance from Kruger (1988, p.151) who suggested: "rapport should exist between the researcher and the subjects, and it is important that the researcher creates a situation in which the subject can feel relaxed and where anonymity and confidentiality can be guaranteed if so desired by the subject". Therefore, as a qualitative research principle and given the potential sensitivity of the research topic, all the participants were again contacted and assured anonymity prior to the

interview, with the affirmation that the information shared was to be solely used for academic purposes. All but three of the participants were concerned about anonymity. The researcher furthermore requested participants' permission to use an audio tape recorder to record the interview and asked them to read and sign an informed consent document, thereby demonstrating their understanding of ethical issues involved in the study.

4.4.3. Participants

As mentioned before, the "actors" of the present study consisted of fifteen participants each representing different organisations. A table of the biographical data is presented in Chapter 5.

4.4.4. Instrument Design: The Interview Guide

The interview guide used in the study (see Appendix B) was divided into three sections representing self-contained themes. The following themes were extracted from the literature overview:

- Participants' procedural experiences regarding legal requirements (as discussed in Chapter 2);

- Participants' personal experiences of the their role as implementers, with specific reference to organisational expectations and their emotions (as discussed in Chapter 3); and

- Participants' experiences of organisational enabling strategies and their personal preparation for facilitating the retrenchment conversations (as discussed in Chapter 3).

Each section contained a series of general questions and potential probes to be used in exploring that theme. The interview protocol was developed from methods documented by McCracken (1988) and Brenner, Brown and Canter (1985) based on their qualitative research experiences.

The interview guide was designed with the dual aim of avoiding bias and ensuring adequate reporting within the frame of reference of the present study. The structure adopted helped minimise bias through the pre-specification of non-directive questions and probes. The interview guide was also designed to ensure completeness in covering the terms of reference of

the study during each of the interviews. Moreover, in order to elicit full and undirected accounts from participants on the themes under investigation, the interview guide was designed to be used flexibly, i.e. the guide did not require that questions be addressed in a particular order. The pre-specification of questions and probes on each theme assisted in maintaining a non-directive stance, even if used in a different order from that indicated in the guide (Brenner, Brown & Canter, 1985).

4.4.5. Data Gathering Method: The Interview

The interviews were conducted during the last week of August and first week of September 2006. The qualitative research interview sought to understand and infer meaning from themes of the lived, daily world as experienced from the participants' perspective (Holliday, 2002; Neuman, 1997; Terre Blanche & Durrheim, 1999; Winegardner, 2001). The objective was therefore to gather descriptions from the participants' *Lebenswelt,* i.e. the life world, as is encountered in direct and everyday life by the participant and given in direct and immediate experience, independent of and prior to explanations (Kvale, 1996).

The choice of data collection method or technique requires consistency with the research objectives, purposes and strategy employed in any study (Saunders, Lewis & Thornhill, 2003). In view of the previously mentioned description of a qualitative research interview, the choice of this data collection method was congruent with the epistemological orientation of this research, namely, a qualitative, exploratory and phenomenological-hermeneutic approach. As such, the interview focused on a descriptive and explorative account of the participants' consciousness and experiences as guided by various themes in the literature (Flick, 2002; Saunders, et al., 2003).

Appointments were made with the fifteen consenting participants to conduct a semi-structured interview. Tuttery, Rotnery and Grinnell (1996, p.56) recommend that a semi-structured interview is used when a researcher wants to understand people's experiences, and they conjecture that "it is important

when you want to compare information between and among people while at the same time you wish to fully understand each person's experience". According to Polkinghorne (1989), the phenomenological interview is seen as a discourse or conversation involving an interpersonal engagement in which subjects share their experience with the researcher.

The participants were offered their choice of location to provide for a non-threatening environment. Holliday (2002) contends that the selection of a non-threatening location is considered critical when interviewing participants about experiences that may be challenging on a personal or emotional level. Some of the interviews were conducted at the participant's place of work, in their offices as they had the necessary facilities to accommodate the researcher. Alternatively, where requested, the interviews were conducted at the researcher's offices.

The interview sessions lasted between 45 minutes to two hours, depending on the time available and the need to explore the participant's experience in more detail. As suggested previously, the interviews were tape (audio) recorded with consent from the participants, who were assured of the anonymity thereof in that the research was to be used for academic purposes only. The in-depth interviews took place using semi-structured questions (see Appendix B), which guided the emergence of rich and comprehensive information relating to their experiences as retrenchment implementers. Semi-structured interviews are suited to exploratory or explanatory research and include a number of pre-defined questions, derived from a list of central themes as found in the literature review of a particular area (Flick, 2002; Saunders, Lewis & Thornhill, 2003). They are thus neither free conversations nor highly structured questions, allowing for flexibility in probing important areas of investigation as directed by the participant (Marshal & Rossman, 1999).

As stated, the interview guide consisted of a variety of questions designed to elicit information that would highlight a holistic understanding of the participants' experiences of having to implement the retrenchment (Holliday,

2002). These included open questions designed to attain a description of a situation or event such as: "Can you describe the goals/objectives offered by management for the impending retrenchment(s)?" and closed questions designed to obtain specific information: "Are you familiar with the Labour Relations Act, 66 of 1995 (as amended) provisions regarding retrenchment: s189?" Also included were probing questions used to explore a particular focus of direction or significance to the research area, such as: "How did you feel when you heard that you were tasked with implementing the retrenchment?" The use of reflection was at times used when probing an area of interest where a statement made by the participant was paraphrased by the researcher using the participant's own words (Saunders, Lewis & Thornhill, 2003).

4.4.6. Data Analysis and Interpretation

Once the interviews were completed the tape recordings were transcribed verbatim and formed into a readable text that was free of redundancy. The transcripts delivered 235 pages of interview data. Such transcripts provided the basis for this next stage of the research, namely data analysis. Polkinghorne (1989, p. 50) asserts, "the aim of phenomenological enquiry is to reveal and unravel the structures, logic and interrelationships obtained in the phenomenon under inspection". Data analysis is at the core of this aim as it enables the researcher to derive a description of the essential features of a specific experience. In pursuit of this goal, data was analysed using content analysis as located within a descriptive-interpretive approach (Boyatzis, 1998). This technique of analysis was selected as it provided a tool to make inferences by systematically identifying specific characteristics within the transcribed text and was considered appropriate since it guided the researcher with regards to the generation of themes, codes, categories and propositions, thereby facilitating the researcher's holistic understanding of the participants' experiences. A descriptive-interpretative approach to data analysis is also congruent with the phenomenological-hermeneutic underpinning and was appropriate for the present study as it related to both describing the participants' experiences and interpreting such experiences against previous literature and research conducted in this area (Flick, 2002).

Unlike quantitive analysis, which may occur as a separate stage during the research process, the qualitative approach to analysis requires that the stage of data analysis occurs simultaneously with other stages such as data collection, interpretation and report writing (Terre Blanche & Durrheim, 1999), therefore requiring the qualitative researcher to be equipped to such an interactive approach to analysis.

A process of reduction, involving summarising and simplifying the data followed, which is the subject for discussion in the following section.

4.4.7. Categorisation of Themes

To understand the experiences of the participants, the researcher re-read the fifteen transcript protocols and re-listened to the recorded interviews repeatedly to gain a holistic sense of the whole data collected. Terre Blanche and Durrheim (1999) refer to this as a process of immersion. This process also involved rough note taking and the drawing of diagrams in an attempt to make sense of the findings.

A more exacting analysis was followed by classifying the raw data into meaningful categories, according to emerging thematic patterns (Neuman, 1997) such as the participants' emotional experiences tasked with having to implement the retrenchment. Themes therefore refer to units of meaning derived from patterns such as conversation topics, feelings and recurring activities (Boyatzis, 1998) and were labelled through a system of coding (Farber, 2006). Themes were initially expressed in the everyday language of the participants and later transformed into formal psychological language (Neuman, 1997). The researcher was mindful to focus attention ensuring that such categories were both meaningful in relation to the data as well as to other categories such that a well-structured analytical framework was developed (Flick, 2002). This provided the basis for the next step, namely unitisation.

4.4.8. Unitisation

The process of unitising data involved identifying chunks or units of meaning in the data and relating such units to the appropriate categories of themes that

have emerged in the previous stage (Boyatzis, 1998). Maykut and Morehouse (1994) refer to these chunks or units of meaning as indicators and contain the actual verbatim quotations and statements offered by participants during the in-depth interviews.

The process of unitising data requires a systematic method in order for valid and coherent conclusions to be arrived at (Saunders, Lewis & Thornhill, 2003). To this end, different methods of indexing are employed by researchers, for example some choose to use an indexing system with cards that are cut and paste and others find it helpful to use different colour highlighters or record the emergent categories where they occur in the respective transcripts (Faber, 2006). The present study used a blend of the aforementioned indexing systems, which involved a combination of highlighting key phrases and noting word repetitions, followed by indexing the category in the margin of the transcript, for example: IMP/EMO/EXP refers to implementer's emotional experiences.

4.4.9. Structuring and Displaying Data

A structured data display was used to present indicators with their appropriate categories such that coherent and justified conclusions could be drawn. This type of data display was selected over other types such as partially ordered display, role or time display as the study involved a clearly defined set of variables based on prior information derived from the literature (Miles & Huberman, 1994; Saunders, Lewis & Thornhill, 2003).

Data was displayed using a spreadsheet format with a tabular matrix where the columns represented central themes and sub-themes and the rows represented the indicators associated with the various themes and sub-themes. The alphabetic letter assigned to each participant for each interview transcript was noted alongside the respective indicators so that each sentence or statement could be traced to the respective participant (Saunders, Lewis & Thornhill, 2003). This assisted with keeping track of the context within which the statements or sentences may have been voiced.

Themes and sub-themes were established and labelled by way of the constant comparative method. This process involved comparing and contrasting each new unit of meaning to all other units of meaning in order to subsequently group these together. Through this process of continuous refinement, initial categories were changed, merged or discarded; related themes were combined and catalogued into sub-themes (Maykut & Morehouse, 1994; Terre Blanche & Durrheim, 1999) until central themes and their respective sub-themes emerged.

This systematic arrangement of central themes and sub-themes served to facilitate the ease and speed of drawing clear conclusions and allowed for the comparison of participant responses across various themes and sub-themes as well as showing how often a certain response was replicated. This arrangement consequently promoted the achievement of an integrated understanding of the participants' experiences in a manner that made theoretical or conceptual coherence (Miles & Huberman, 1994).

The next section will focus on evaluating the quality of qualitative research, which requires consideration of in particular, factors like validity, reliability and generalisability. Interviewer bias and ethical considerations will also be discussed.

4.4.10. Reliability

Within a qualitative framework, reliable research refers to the consistency of research findings and relates closely with the quality of the research process (Holliday, 2002).

Functioning as a precondition for research validity, reliability is threatened by any careless act in the data gathering process or by ambiguity of various kinds. To ensure the preservation of reliability, the researcher therefore endeavoured to develop and describe the research question and design of the study in a clear and non-contradictory manner, such that every step of the research was congruent and consistent with the former.

Regarding data gathering and analysis, multiple observer bias was avoided since only the researcher collected and analysed the data. The researcher furthermore applied peer debriefing as part of methodological rigour, by sharing the research methods, analysis, interpretations and findings with academics working in the field of qualitative analysis who provided critical feedback and suggestions. The incorporation of their inputs strengthened the analysis (Holliday, 2002).

4.4.11. Validity

According to Saunders, Lewis and Thornhill (2003), qualitative research is considered valid insofar as it is useful and worthwhile in assisting the researcher, participants and others to gain a deeper insight and understanding of the meaning of the phenomenon under investigation. The findings of the present study provide rich, reflective material for the implementers of retrenchment with regards to raising their awareness to the experience of having to implement the retrenchment as well as the means by which they choose to cope with their task. The findings also benefit retrenchment decisionmakers (or senior management) in that it offered a window on the life-world of the implementers, thereby assisting them in understanding some of the challenges faced by the implementers in implementing the retrenchment decision. The findings therefore offered guidance in the role that they can play in preparing the implementers to deal with the emotional, psychological and psychosocial impact of retrenching others. Finally the findings offered guidance to implementers in their personal preparation for their role.

Research validity was furthermore attained by clarifying and checking the participants' responses both during the interview (i.e. by way of probing and crosschecking) and at the end of the research (Flick, 2002). To this end, copies of the transcriptions were made available to all the participants for validation of their experiences as implementers of retrenchment. The researcher furthermore endeavoured to verify individual viewpoints and experiences against other participants and ultimately a rich picture of the

experiences of those under scrutiny was constructed based on the contributions of a range of participants (Van Maanen, 1983).

Miles and Huberman (1994) opined that validity is moreover enhanced if it proves to be believable, coherent and logical, given the research question, data collection, processing and interpretation of material. To this end the researcher ensured that validity was achieved insofar that a unified, non-contradictory and comprehensive picture of the lived-through experiences of implementers from various organisations was presented in a manner that addressed the research question, namely what are the experiences of retrenchment implementers?

Kvale (1996) suggests that the validity of research is also ensured through the suggestiveness and potential of the research to provide fertile ground for raising questions that stimulate further research and interpretation. This is particularly applicable to the present study since the experiences and resulting consequences of retrenchment on this group of organisational stakeholders have been an area largely neglected. The propositions of the present study may add to existing research on the survivors and victims of retrenchment and stimulate further research for a more complete grasp and appreciation of the human costs of retrenchments.

4.4.12. Generalisability

Generalisability refers to the transferability of conclusions to other contexts demonstrating that the results of the work at hand can be applied to a wider population (Merriam, 1998). Patton (1990) challenges this and asserts that the purpose of qualitative research is not to produce generalisations. With this in mind, participants in this study were selected to provide "information rich cases" for studying in depth and specific experiences (Patton, 1990). It is the researcher's belief that by offering a rich account of the views expressed by this group of retrenchment implementers, the researcher succeeded in indicating the extent of transferability of the present study's findings to other milieu. This view is confidently expressed by the researcher in relation to what commentators like Borgman (1986) and Pitts (1994, cited in Shenton, 2004)

have suggested. They acknowledge that the understanding of a phenomenon is gained gradually, through several studies, rather than one major project conducted in isolation. And so, in an attempt to initiate an exploration into this as yet inadequately researched area of study, particularly in the South African context, namely the experiences of the implementer, the research sites constituted multiple environments in which the phenomenon under investigation took place. The researcher furthermore maintains that the present study was solely concerned with exploring and providing a "baseline understanding" with which the results of subsequent work could be compared.

To this end, the findings of this research will not only be accessible to the participants in this study, but will also be documented in scientific journal articles to further facilitate raising of awareness of the challenges faced by implementers as well as recommendations for the emotional preparation and support required for the retrenchment implementers.

It is the informed view of the researcher that the present study can however be considered generalisable insofar as the themes emanating from the findings are tied with the broader themes of implementer procedural and emotional experiences, coping techniques to deal with these experiences and organisational enabling strategies as unearthed in the literature review. Bearing in mind the multiple contexts of the research, the researcher furthermore maintains that such themes can therefore be transferred to and have a bearing on other contexts, as related to the individual experiences of the retrenchment implementers.

4.4.13. Interviewer Bias

Researcher bias refers to the manner in which the researcher impacts and affects the data emanating from the interviews (Flick, 2002). The semi-structured interview method used in the present study is rich in heuristic potential, but is always subject to the intrusive effects of interviewer bias, both during the interview and in the analysis of transcripts (Lillis, 1999). Several tactical approaches were used in the study to limit bias.

First, an interview guide was designed with the aim of ensuring complete and consistent coverage in each interview of the themes under investigation as well as minimising researcher intrusion through the pre-specification of neutral questions and probes.

Second, a systematic analytical protocol was used to develop theoretical propositions from the qualitative data. This process provided for the development of an audit trail from the transcribed text to the results of analysis, through successive stages of data reduction and summarisation to the development of theoretical propositions.

Third, interview bias was addressed through the researcher clearly articulating her intentions to the participants on three occasions, namely when the participants were first approached for interest to participate, again when the participants indicated willingness to participate and finally as the interview was about to commence. This included conveying who she was, the main purpose for the research and what she intended to do with the findings.

Fourth, the researcher employed a self-reflexive approach to mediate interviewer bias, by monitoring how her own emotions might bias the findings, being mindful of her preconceptions and by attempting to suspend her personal judgements such that the data could be collected in a bias-free manner. Moreover by adopting a self-reflexive approach, the researcher was vigilant against leading implementer responses; rather entertaining responses precisely as the participants presented them to her.

4.4.14. Ethical Considerations
Neuman (1997) is of the view that ethics begins and ends with the researcher and that the researcher's personal moral code is the strongest defence against unethical behaviour.

4.4.15. Informed Consent
As mentioned previously, the researcher communicated the purpose of the study and informed the participants of steps taken to ensure their anonymity and that all data was to be treated with confidentiality. Any issues of

discomfort were directly addressed before obtaining signed consent from the participants and they were offered the opportunity again at the commencement of the in-depth interview to decline participation. The participants were furthermore informed of the study supervisor's and supervising university's details and the possibility of obtaining a summary of the results.

4.4.16. Researcher Integrity

According to Mouton (2001, p.240) researcher integrity implies the following:

- Adherence to the highest possible technical standards, teaching and practice.

- Since individual researchers vary in their research modes, skills and experience, they should always indicate the limits of their findings and the methodological constraints that determine the validity of such findings at the conclusion of the research study.

- In practice or other situations where researchers are requested to render a professional or expert judgement, they should represent their areas and degrees of expertise accurately and justly.

- In presenting their work, researchers are obliged to always report their findings completely and not to misrepresent their results in any manner. To the best of their ability, researchers should also disclose details of their theories, methods and research designs that might be relevant to interpretations of research findings.

It is the researcher's opinion that to the best of her ability and knowledge, all the aforementioned requirements of researcher integrity were met throughout the present study.

4.5. Summary

In the present chapter the research methodology was explicated.

This chapter recorded the parameters of the sample population as well as the means by which the selection of participants took place. The present study made use of semi-structured interviews as the primary data gathering method

by which insight was gained into the subjective life-world of retrenchment implementers.

A detailed discussion of the data analysis process was offered by way of categorisation, unitisation, the data display format as well as strategies employed to generate a comprehensive and coherent understanding of the implementer experiences.

This chapter concluded with a brief discussion of the means through which the quality of the qualitative research process was dealt with.

In the following chapter (Chapter 5) the results are presented for the qualitative (semi-structured interviews) research.
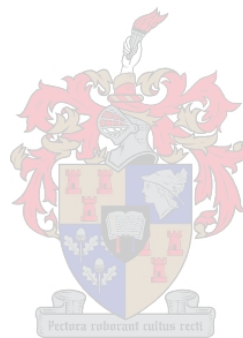
CHAPTER 5: PRESENTATION OF RESULTS

5.1. Introduction

This chapter comprises the findings obtained from the qualitative interviews. The raw data indicating the rich experiences of the implementers is available in electronic format, which is attached as a CD and included as Appendix C for the reader to peruse at length.

In the presentation of the results, direct quotations and excerpts from the interviews are used and italicised so that, firstly, the study remains true to the lived experiences and views expressed by the participants and secondly, the reader's understanding of the participants' experiences are enhanced, thereby gaining a better perspective. It was felt that the discussion of the results (Chapter 6) would be facilitated by such understandings and perspectives.

Prior to the presentation of the emerging themes and sub themes, this chapter commences with a presentation of the participants' biographic data, background detail on their familiarity with s189 and s189A of the Labour Relations Act 66, of 1995 (as amended) and the extent of their involvement as retrenchment implementers.
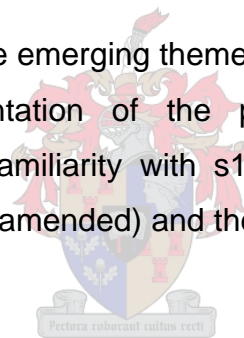
The analysis of the data led to the emergence of a number of themes and sub-themes. To this end each key emerging theme is explained, followed by a description of the sub-themes within these.

The frequency of responses could exceed the number of participants involved in the present study because some of the participant's were involved in more than one retrenchment initiative in various organisations during their working lives to date.

5.2. Biographical Data

Biographical data (see Table 5) for the implementers was gathered in the following categories: age, gender, designation, industry, highest educational qualifications and number of years work experience.

Table 5. Biographical Data

Participant	Age	Gender	Designation	Industry	Highest qualifications	Work Experience
A	Unknown	Female	HR Consultant	Advertising, retail, liquor, insurance	Honours Psychology	16
C	40	Male	Operations Manager	Motor, engineering	MBA	17
D	37	Male	HR Manager	Security	Honours Industrial Relations	10
E	48	Female	HR Consultant	Government	HR Diploma	26
F	Unknown	Female	HR Manager	Services	Honours Psychology	8
G	44	Male	HR Executive	Banking, mining, engineering	Nat. Higher Dip: HR	15
H	37	Female	HR Executive	Packaging	BA, Industrial Psychology	7
I	35	Female	Marketing Director	Fashion Retail	B.Comm. Honours	13
J	48	Male	Managing Director	Fashion Manufacturing	Matric	30
K	31	Female	HR Manager	Leisure	HR Diploma	10
L	43	Male	HR Manager	Liquor, manufacturing	Honours Industrial Psychology	20
M	42	Male	HR Director	Fashion Retail	MBA	18
N	53	Male	Production Manager	Textiles	Diploma	34
O	36	Female	HR Manager	Semi-government	IPM Personnel Diploma	15
Q	37	Female	HR Manager & part-time Lecturer	Unknown	HR Diploma	15

The record of the interviews of Participants B and P could not be used due to the inaudibility of the recording. From the table it is clear that the participants consisted of two Human Resources Consultants, six Human Resources Managers, two Human Resources Executives, one Human Resources Director, one Operations Manager, one Marketing Director, one Managing Director and one Production Manager. Eight of the participants are female and seven are male. Between them, the participant's have 254 years of work

experience and work in the fields of advertising, retail, liquor retail, insurance, automotive, engineering, government, semi-government, services, banking, mining, packaging, fashion retail, fashion manufacturing, leisure, liquor manufacturing and synthetic textiles.

5.3. Knowledgeable about the Legislative Requirements

The following discussion is not covered in the literature review chapters because no information was obtained from the literature regarding aspects of implementers' knowledge of s189 of the Labour Relations Act, 66 of 1995 (as amended) nor the frequency with which implementers have been involved in implementing the retrenchment and rather pertains to the participants involved in the present study.

Thirteen participants claimed that they were familiar with the various provisions of s189 pertaining to dismissals for operational requirements and s189A pertaining to dismissals for operational requirements by employers with more than 50 employees and two participants, claimed that they were not. Table 6 represents the methods in which participants familiarised themselves with s189 and s189A.

Table 6. Method of becoming familiar with the Legislative Requirements
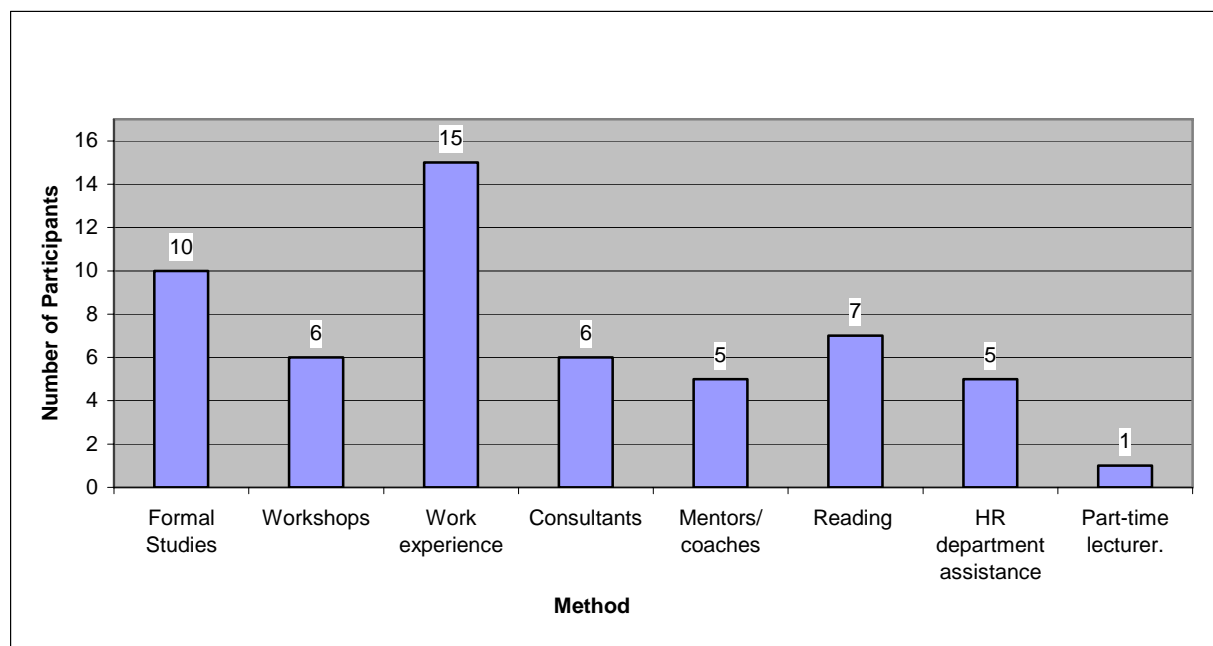
The table shows that the participants familiarised themselves through various means with the provisions of s189 and s189A. In all instances it is clear that participants increased their knowledge of the legal requirements via on-the-job work experience.

All fifteen participants have personally been involved as implementers of retrenchment and their participation varies in frequency from *"one to many times"* with between *"one to 30 personal involvements in retrenchment conversations"*.

The first central theme to emanate from the research relates to the implementers' experiences of the procedural aspects of the retrenchment.

5.4. Implementers' Experiences of Procedural Aspects of Retrenchment

This central theme reflects the implementers' experiences of the manner in which the retrenchment process was managed, i.e. the procedural aspects of s189 and s189A of the Labour Relations Act, 66 of 1995 (as amended). Emerging sub themes include amongst others the causes of the retrenchment, participants' perceptions of whether the organisational goals were achieved with the retrenchments and whether the retrenchments made business sense. Further sub themes relate to participants' experiences of organisational management style and whether the possibility of retrenchment was approached with an open mind, participants' perceptions of whether there was consultation with all stakeholders, whether alternatives were considered, the selection criteria applied, notification processes and severance packages and other support offered.

5.4.1. The Causes of Retrenchments

Section 213 of the Labour Relations Act, 66 of 1995 (as amended) defines the term "operational requirements" to mean, "requirements based on the economic, technological, structural or similar needs of an employer" (Thompson & Benjamin, 2006). The table on the following page depicts participants' experiences of the causes of retrenchment in terms of their organisations' "operational requirements".

Table7. Causes of Retrenchments.
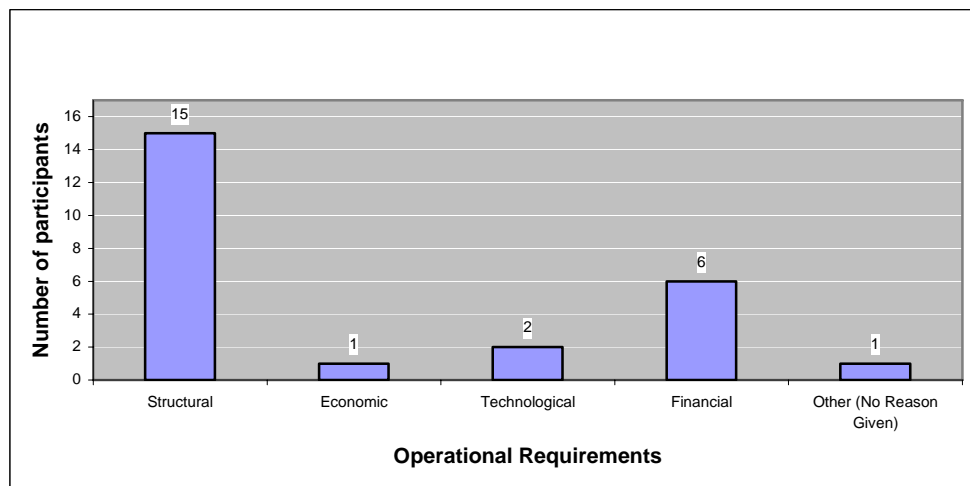
From the table it is clear that the need to **restructure** was the **most frequent** cause for the retrenchment decision.

Participant perceptions varied in terms of whether the business goals were achieved with the retrenchment. The majority of participants (nine) agreed that the objectives were achieved, a smaller number (five) disagreed and then there were a few (four) who were undecided. The latter were of the view that although there was a short-term benefit, there might have been a longer-term loss.

Five participants were of the opinion that the retrenchment initiative made business sense and three participants were of the opinion that it did not. A number of participants (eight) were uncertain because they felt that the retrenchment had positive and negative outcomes.

5.4.2. The Organisational Management Style
The table on the following page depicts that the majority of participants' experienced the organisational management style as autocratic in making the final decision on whether to implement the retrenchment decision.

Table 8. Organisational Management Style.
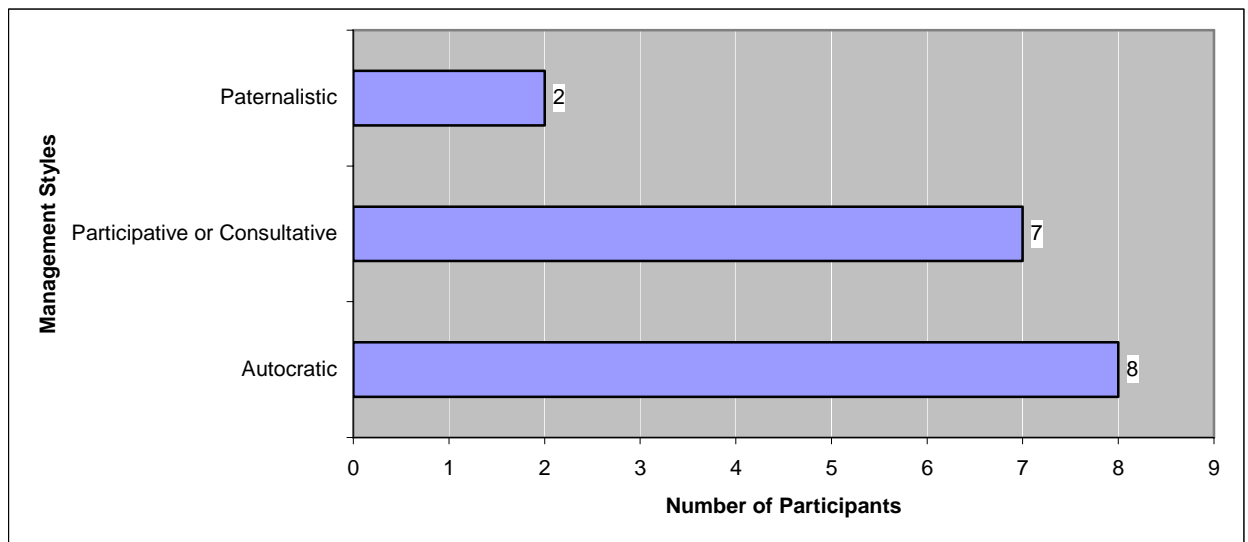
5.4.3. Contemplation Stage

As discussed in Chapter 2, according to s189, when an employer **contemplates** dismissing one or more employees based on operational requirements, the employer must consult with the parties identified in the collective agreement, the registered trade union, workplace forum or employees representative(s), as the case may be (Thompson & Benjamin, 2006). Section 189, therefore is clear that before the final decision is made to retrench, employers need to approach the possibility of retrenchment with an open mind. Emerging from this sub theme is the participants' experience of whether management had approached the possibility of retrenchment with a predetermined decision that they would retrench. The majority of participants (12) were of the opinion that management had **already made the decision** to retrench prior to entering into the consultation process.

5.4.4. Consultation

The legal requirements relating to procedures to be followed during consultation was discussed in Chapter 2. Ten of the fifteen participants indicated having **consultation** with the other party. In those instances, participants experienced amongst others, management declaring reasons for the necessity of retrenchment, discussion of alternative options to minimise

the impact of retrenchment and feedback regarding the suggested ideas offered by the consulting parties. Participants varied in their opinions as to whether the consultations were **meaningful** and whether there was a concerted attempt at consensus seeking and therefore the researcher cannot categorically state that consultation took place according to s189.

Examples of **alternative options** to retrenchment that were instituted in the majority of cases included, early retirement and voluntary retrenchment with the option to refuse, based on the retainment of specialised skills, demotion, redeployment and eliminating temporary labour.

Six participants experienced **compliance** with **some** of the requirements of s189 or a complete **lack** of compliance with s189. This is in contradiction to the requirements of s189 as is discussed in Chapter 2.

In two instances, participants indicated that employees were reluctant to or did not offer **suggestions**. In their opinion, the reasons for this related to employees believing that management had already made up their minds to retrench as per one participant's explanation: *"9/10 times employees would say that they 'hated' managements suggestions, but they rarely offered alternatives. I don't really know why, maybe they felt that management had in any case made up their minds, so they took a 'God's water oor God's akker approach, kom ons wag nou maar vir die valbyl'. Perhaps they were right, because companies do what they have to do and the unions and shop stewards understand this very well, in my experience".* The second participant was of the view that nobody wanted to be responsible for a colleague potentially losing his or her job due to suggestions offered.

5.4.5. Selection Criteria

The legal requirements regarding **selection** criterion was referred to in Chapter 2. In some instances a combination of criteria was applied. For example, the "Last In First Out" principle subject to the retention of key skills and consideration of poor performance records was applied in nine of the participants' organisations. While they felt that the principle of "Last In First

Out" would seem to offer some sort of guideline for selection, eight participants also commented on the efficacy of "Last In First Out" and whether it was good business practice. In their view, while skills and experience were retained, newer ways of thinking and younger talent was lost or people that were close to retirement were retained.

The **majority** of participants (12) experienced another approach to selection criteria where the organisational **strategy** informed the new look company or division. The new organogram constituted divisions or departments, depicting functions with job descriptions and accompanying skills required. Employees were invited to apply, interviewed and selected, based on meeting the requirements of the position.

Outsourcing to employees, by bringing them back as independent contractors or setting up businesses for them to run as suppliers of services or products, was used in a minority (3) of instances as a technique for selection.

A final selection approach emerging from the interviews was the application of **poor performance** as a process to select employees out, as was experienced by nine of the participants. In these instances, seven participants experienced it as a subjective process and an unfair selection mechanism, because in their opinion, poor performers or *"people with attitude"* or other unwanted employees were managed out of the company **under the guise of retrenchment** and they preferred that the organisations made use of their poor performance processes more effectively when it came to managing poor performance.

Eight participants struggled with the concept of fairness in the application of selection criteria in particular and the fact that people were losing their jobs in general.

In eight of the participants' experiences, senior management were given packages and asked to resign. In four of these instances, participants felt that

this amounted to inconsistency in the application of selection criteria and this they felt was unfair. In this regard, "Last In First Out" for example, was only applied to the lower level or unionised employees, while senior management were approached with *"packages and given the option to resign rather"*. This, however, is not in contradiction with s189, which states that there needs to be consensus on the method for selecting employees to be dismissed or if no criteria have been agreed, criteria that are fair and objective (Thompson & Benjamin, 2006).

Some participants were of the opinion that some employees were protected and selected in. Six participants remarked about the company **politics** that played out during this process, which contributed to their perceptions of unfairness, as is encapsulated by the following experience: *"I'll never forget with my one company I got all the vacancies where people could apply, but what the 'stupid sods' didn't do, they put peoples' names in already, on the initial spreadsheet and they 'hide it' and I, 'unhide it' and went to them and said: 'why did you people bother to lie if you'd already decided who you wanted to employ?' And there were big eruptions about this in the company and all it took was somebody who was computer literate, to see"*, and by a further example: *"Retrenchment took part across the organisation but it seemed that some individuals and departments were 'protected' and not as objectively handled as others – empire building"*.

In the minority of cases (three) participants intervened to ensure that those selected for retrenchment were treated fairly. These participants emphatically stated that when they suspected the **integrity** of the selection criteria was being compromised, they would step in to ensure fairness in the application of selection criteria. The following statement by one of the participants captures an example of this: *"Sometimes operations see it as a way of getting rid of bad workers, then you say to them: 'bring their personnel file let's see what you have done by way of managing performance, how many counsel letters, how many warnings did he have.' If there is nothing in his file and the guy is adamant that this is a 'bad' person, but there is nothing in his file, you say: 'I am sorry, I can't help you'."*.

The majority (ten) also commented that hasty decisions often led to a situation where people were recruited back either as consultants or just reemployed but in other slightly different roles and they wondered about whether anybody (the organisation or employees) benefited in the long run. In six instances this was viewed as unfair as *"peoples lives were played with"*, but some felt that these things couldn't be predicted, especially with *"upturns in the market or when new customers or contracts were won"* as was the opinion of five of the participants.

With regards to the perceived fairness of procedures followed in selecting out, five participants were of the view that the inclusion of affected employees in organisational decisionmaking mitigated their perceptions of fairness. A minority of participants (four) also experienced the selection process as fair since all employees were affected, in other words from the top right down to the lowest level of employee.

5.4.6. Severance Pay

The next sub theme relates to the participants experiences of severance packages offered to the victims.

As discussed in Chapter 2 in terms of section 41(2) of the Basic Conditions of Employment Act, 75 of 1997 (as amended), an employer is required to pay severance pay equal to at least one week's remuneration for each completed year of service.

Six participants experienced their organisations as offering the minimum requirements of the law and then also leave pay, provident fund and the like. With regards to other benefits offered, one participant referred to share options being paid out and another mentioned the continued payment of Medical Aid for three months: *"… unless they found another job…"*

In some of these instances (four), participants were of the opinion that the practice of senior management receiving more than the minimum

requirements and junior staff receiving the minimum in terms of severance pay was unfair.

One participant relays an example of unfairness in her opinion: "*In the one case I had a guy, I think he was a bit retarded but he came to work, sometimes he would wear shoes that were too small for him, he would walk on his toes. He was 'dom'. And he took a package of R8000, went out and bought himself a leather jacket and made one payment on a 'bakkie' and ended up homeless. You know that's the reality of voluntary retrenchment. He was an adult and I counselled and counselled and counselled, the unions helped me with him; but he still wanted to take it. R8000 was the most money he'd seen in his life. So is it fair? All the legal requirements were followed but I think it was a 'skande' – because that guy should not have lost his job".*

Eleven of the participants experienced the organisation as **offering more than the minimum requirements** for severance pay. Participants referred *to "generous severance packages".* Five participants continued to add that their organisation offered generous packages as they wanted employees to volunteer for retrenchment, *"but the downside to this was that the 'good apples' applied and wanted to leave".* In their view this posed a dilemma to management and in one instance, the participant experienced management imposing a deadline on the voluntary retrenchment option to minimise the impact of losing good employees.

5.4.7. Organisational Assistance offered to the Victims

As was discussed in Chapter 2, consultation is an essential step and when an employer considers retrenching employees because of operational requirements, he must also disclose in writing to the other consulting party relevant information pertaining to any assistance that the employer proposes to offer the employees likely to be dismissed and the possibility of future re-employment (Thompson & Benjamin, 2006). The table on the following page describes participants' experiences of organisational assistance offered to the victims.

Table 9. Organisational Assistance Offered.
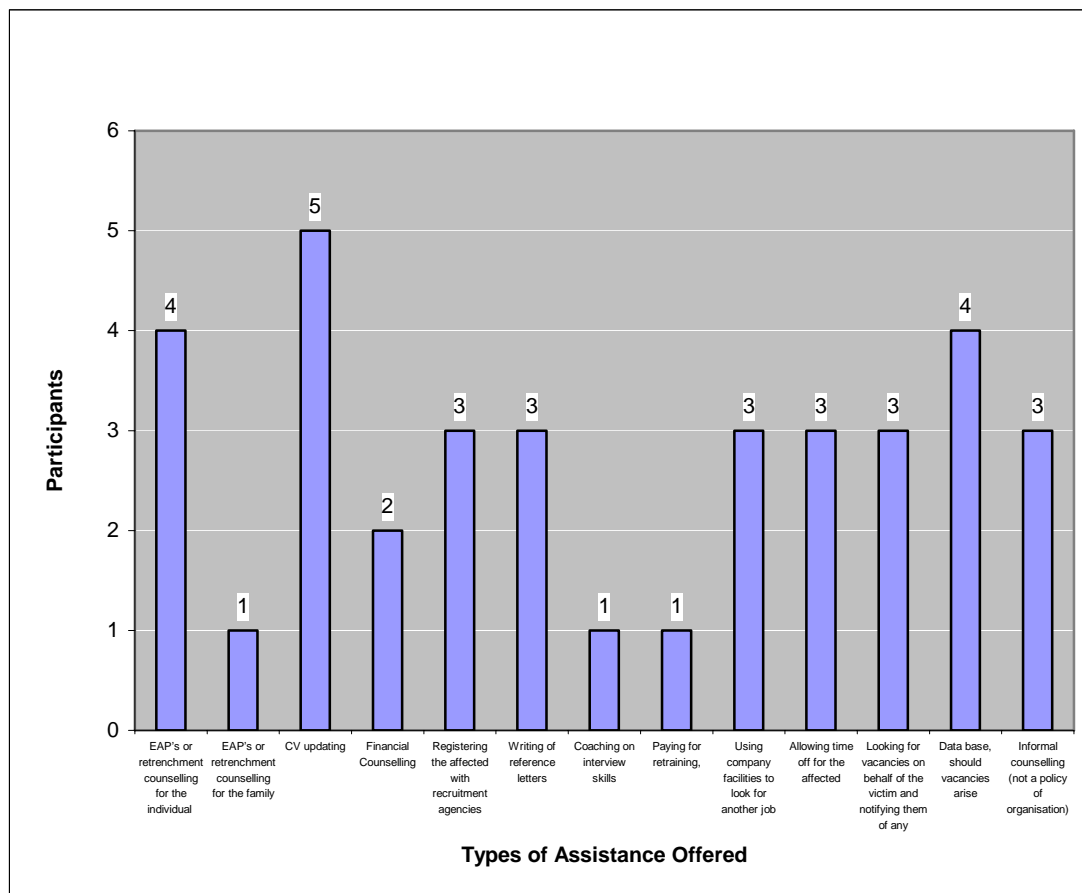
The table shows that in the **majority** of participants' experience, the organisation offered some form of formalised **assistance**, with individual retrenchment counselling for the victim being the most popular form of assistance being offered. Seven of the participants offered informal counselling, which was not part of their organisation's official position on assistance offered. The least frequent form of assistance offered was coaching for interview skills.

A **minority** (three) of participants experienced **no** official **assistance** offered.

With regards to the offer of **re-employment**, nine participants experienced this as part of the retrenchment agreement. One participant remarked on the efficacy of data bases as in her experience, it was a case of employees moving, or their contact numbers changing and the data bases were impossible to manage based on the sheer size of it. Another participant remarked that they had an agreement with the union to be able to select

whom they wanted re-employed from the data bases as in some cases, the manual labour tasks required younger, fitter and healthier employees.

5.4.8. Communication Process

As was discussed in Chapter 2, according to s189, the consulting parties are obliged to enter into **meaningful interaction and the organisation is required to disclose in writing** to the other consulting party relevant information pertaining to the possible retrenchments (Thompson & Benjamin, 2006). This relates to the communication (verbal and written) processes before and throughout the retrenchment process.

In most of the cases, bar six, the participants suggested that the initial news about the contemplation to retrench did not come as a surprise. In those instances where it did not come as a surprise, one participant for example was of the opinion that employees were expecting the division closure due to it no longer being financially viable to operate. In another instance, rumours that had been circulating in the months preceding the final decision lessened the element of surprise. In the cases where news of the retrenchments did surprise employees, participants expressed their dissatisfaction with the absence of notification and communication processes.

The majority of participants (14) were satisfied that attempts at **communication increased** in their organisations, once the news of the retrenchment decision had broken. Communication increased on issues such as the new strategy and organogram, functions that would be affected, new job descriptions and related job functions and the selection criteria for who would eventually stay and who would go.

Some expressed that while timely notification was offered and should therefore logically speaking provide ample time for employees to prepare for the retrenchment, it still did not mitigate the initial shock reaction to the news that a final decision had been made and that this would result in colleagues losing their jobs. Once the victims were notified of their status, communication also increased with them in the majority of instances.

An interesting observation was made by Participant F who mentioned that: *"initially only those that were affected were communicated with. Our CEO didn't want the others to know for some reason initially and it was quite interesting to see what transpired…the senior guys that were affected also didn't want others to know…they preferred to resign and a lot of negotiation at that level took place, in terms of pay packages and time left to stay with the company, other than that, particularly with the lower level employees, communication did increase"*.

As to the **mode of communication**, all participants, bar one, reported a variety of means like monthly group and face-to-face meetings, notices on bulletin boards, letters, posters and emails.

In eight of the cases, participants reported that the Chief Executive Officer or more senior person(s) in the organisation played a role in making sure that information about progress or new developments was being communicated. In their view this would seem to indicate that top management cared.

In other instances (six), participants experienced top management as leaving it up to the participants to be the spokesperson and/or the bearer of the retrenchment news. Four participants expressed dissatisfaction with this, with one participant regarding the mode of communication as impersonal and that she was left to do top management's *"dirty work"* and another expressing dismay at the way that her top management managed the retrenchment conversation with the affected employees. In both these instances, the mode and method of communication aggravated their perceptions of fair treatment for the victims. The third participant expressed relief at being the spokesperson as she was of the opinion that management was incapable of delivering the retrenchment news with interpersonal sensitivity. The fourth participant experienced their Exco as *"just walking in and telling us that we were retrenching 50% of the workforce"*. This he described as *"shocking treatment"* and aggravated his experience of unfair treatment of employees.

With regards to post retrenchment communication on **re-employment**, nine participants spoke of databases or lists that were kept of former employees and in five of these instances, participants specifically indicated knowledge of victims typically being followed up on when opportunities arose. As indicated earlier one participant was not convinced of the efficacy of these *"lists"* and in three instances, participants recounted that the victims would call to specifically enquire about re-employment opportunities.

5.4.9. Treatment

Six participants were of the opinion that the victims were not **treated** with **dignity and respect**. Two participants expressed that in their experience victims were treated as if the retrenchment was their fault as is encapsulated by Participant L: *"they were treated as if they had done something wrong".* Four participants were of the opinion that employees were retrenched on a subjective basis and that aggravated their experience of unfair treatment.

While follow up systems are not legally prescribed by the law in South Africa, it will be discussed next as it appears in the literature review and because participants in the study made mention of encountering informal follow up systems in their experience.
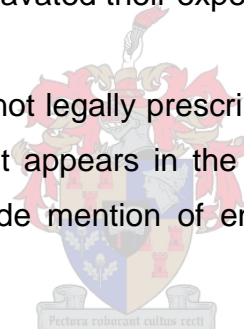
5.4.10. Employee Wellbeing Follow-up Strategies

All participants reported that no formal follow up systems were in place to check up on victims' welfare. Eight participants suggested that it was rather an informal process whereby victims from time to time called in to *"chat"* or the participants would keep in contact informally with victims from time-to-time. In other instances, the informal organisational *"grapevine"* kept participants updated on how victims were faring or they would "*bump into each other in town".* Three participants suggested that they felt victims were too negatively affected by the treatment received to want to have anything further to do with the organisation.

5.5. Implementers' Experiences of Personal Aspects of Retrenchment

Within this second central theme of personal experiences, a number of sub themes emerged. These relate to amongst others experiences of

organisational expectations, implementer role preparation, how the affected stakeholders (victims, survivors and implementers themselves) reacted to the initial news of retrenchments, participants' personal experiences of their emotional reactions to enacting the retrenchment conversation, dysfunctional experiences of the delivery of the retrenchment message and coping techniques applied to enable successful retrenchment conversations.

5.5.1. Personal Experiences of Organisational Expectations

Regarding the participants' personal experiences of organisational expectations in their roles as implementers of the retrenchment act, in all cases the participants' **main task** was ensuring compliance with legal requirements as per the relevant labour legislation and in most cases to enact the retrenchment conversation and answer all questions.

Three participants explicitly stated that they were to make sure that they had *"no comebacks in the form of CCMA cases".*

Nine participants reported that besides meeting the legal requirements and enacting the retrenchment conversations, they were also tasked with **dealing with the victims' emotional reactions** to the news of the final retrenchment decisions.

Some participants, who are line managers, had assistance from the Human Resources Department or Manager in facilitating the retrenchment conversation as was experienced by three participants.

One participant as a Human Resources Executive experienced the Human Resources Department as having a far larger strategic role to play than just a traditional welfare role. This was particularly true in his environment since the operational team would always include him as head of Human Resources in decisions that were being made. In his opinion this was due to the fact that any decision would have an impact on people.

5.5.2. Implementer Role Preparation

Emanating from the next sub theme is participants' personal experiences of the manner in which they were assisted to prepare for their implementer role.

As part of their role preparation, the majority of participants (nine) reported receiving **training** in the procedural aspects of retrenchment as well as training on what they could expect from the victims in terms of their emotional reactions.

The minority of participants experienced personal or group coaching or had a personal mentor to assist them. In these instances the coaches and/or mentors sat in on retrenchment conversations and afterwards provided feedback to the implementers on how they faired during the conversation and what they could improve on.

Four participants reported that they had received no training and in their opinion believed that they were out of their depth because of this, as is encapsulated by Participant O for example: *"No there wasn't any emotional assistance or preparation for me. It was a difficult situation for me, because I was quite a bit younger at that stage and the people in the company were much older. They've been there for 20 years, some of them 30 years. And then 30 years old is quite young when someone is nearly 50 and you've been given the 'message', and now you've come to someone for support who could be your daughter"*.

In two instances, where participants did not undergo training, they relied on the fact that by personally knowing the victims they would be in a position to determine the best way to share the retrenchment message.

Four participants commented that they had been part of so many retrenchments in the past that they deemed it to be a normal part of their roles and as such it had become *"second nature"* to them*.*

As independent Human Resources Consultants, two participants continued to add that they had over the years developed a retrenchment plan, which they presented to client organisations as part of their preparation: *"… which consists of budgeting for counselling, workshops, financial advisors and the like…so that people are just better prepared…"*.

Two participants reported only having procedural training or legal assistance available to them, as per Participant H: *"But I get the help of a labour lawyer when I go into a grey area. But no, not other than: 'how is it going and how far are you?' and that's the extent of that. So, no, I've never had training in how to retrench and how to deal with it and how to facilitate it"* and Participant Q: *"I was able to work together with a corporate legal specialist and legal department as and when required"*.

5.5.3. Experiences of Stakeholders' Reactions

The next sub theme to be discussed will be a description of the participants' personal experiences of how the affected stakeholders reacted to being informed of the retrenchment decision and the focus falls on the reactions of the victims, survivors and the implementers themselves.

5.5.3.1. The Victims' Reactions

The majority of participants experienced a variety of **negative** emotional reactions and some experienced **positive** reactions from the **victims**.

The majority of the participants (14) experienced negative emotional responses from the victims and reported amongst others reactions of shock, initial denial, surprise, panic, blame, anger, threats, bitterness**,** sabotage, crying and screaming.

Expressions of **anger** in the form of shouting and screaming was encountered by seven of the participants, who experienced employees to be angry because they (the victims) said that *"their employers did not care for their people"*.

Participant A encapsulates an example of this experience: *"She shouted at me and threatened me for performing my job, she thought the process was not as effective as she wanted it to be. I looked at her and said nothing. I wanted her to finish. I think it was anger"*.

The same participant also experienced **intimidation** from a union member, at the start of the consultation process: *"I walked in on a union meeting that was going way beyond the agreed time set aside for it, which means production is standing still, which means poor performance…the union member later said to me in private: 'we wouldn't want to see you as a lady get hurt so you mustn't just walk into union meetings'."*.

Three participants reported experiences where victims expressed **bitterness**, because they were hurt or because they had either left a secure job to join the company or as in the third participant's words: *"Everybody feels as if they have done much more for the company than anyone else and people really feel that the company owes them"*.

Four participants experienced incidents of **verbal abuse** as is encapsulated by Participant E: *"In another case I had another coming in and swearing at me and using the filthiest language you've ever heard and not actually being able to interact with you for a long time afterwards because they are ashamed of their reaction and behaviour"*.

In six cases, participants reported experiences of being **blamed** indirectly or directly for the retrenchment. The reasons for this varied. In some instances, participants' experienced the victims' opinion that the Human Resources Department were biased toward management as is described by Participant Q: *"HR was blamed by the odd few for not standing up for the people"*. Another participant experienced the victims suggesting that had their ideas and concerns been listened to before, the organisation would not be in the position of having to retrench employees. A third participant conjectured that victims: *"looked at me as the boss, as if I was the one directly to be blamed for this"* and three participants mentioned not being clear about why they were

being blamed. Two participants reported not experiencing being blamed, as in Participant D's view their employees knew that *"they were on contract and the possibility always existed that clients do not renew their contracts, either because they were unhappy with the guarding services or because they were price sensitive".* In Participant G's experience, because of the clear communication processes leading up to the final retrenchment decision and in his view because of the sophistication level of employees in banking, employees tended not to apportion blame.

One participant experienced machinery **sabotage** in the factory that he worked in, but qualified that by saying that this was perhaps related to the political tensions of the time and another participant shared that in some cases where victims were required to show survivors certain parts of their jobs before they left, they at times were withholding information. Where he suspected this to be the case, he would ask the employee to leave immediately.

Five participants experienced **tears and crying**: "*Another woman just sobbed and sobbed and sobbed"* as was the testimony of Participant I and in most of these participants' views, it was due to the reality of the situation dawning on the victims.

A minority (2) participants reported the victims as showing **no apparent emotion** and saying nothing or being very quiet during the retrenchment interview and later on returning for further discussions, mostly for clarification on what would happen next.

Participant N described a **tragic** experience that would seem to haunt him almost 3 years later, where an employee together with a colleague who was a passenger on the motor cycle that they were travelling on, were both killed in a tragic accident on OuKaapseWeg. The cause of death is suspected to be due to the employee not being able to cope with the uncertainty of the news and so either committed suicide or his emotional state and resulting lapse in concentration may have led to the fatal accident.

Five participants also experienced **positive reactions** in some cases. The attributed reasons for this being that some victims wanted to pursue their own **business interests** or relished the thought of **early retirement** or saw it as an opportunity to **grow** from as is for example described by Participant G: *"People looked forward to starting their own thing, they may be very successful and then have something for their kids to inherit"* and Participant E: *"its amazing how many people started new business, got better positions in companies, its just amazing how many good things came from that"*. Two participants commented on the fact that the amount of employee participation in the decision-making beforehand, in their experience, contributed to some positive responses: *"Some were positive and fairly upbeat, I think because they had opportunity to contribute and people saw that"*.

5.5.3.2. The Survivors' Reactions
As with the victims, the participants also experienced a range of **survivor** reactions, some **negative** and some **positive**.

Indicators of participants' experiences of negative survivor reactions related to negative work attitudes, negative work behaviours, feelings of management mistrust and expressed feelings of empathy, guilt, relief and envy.

Fourteen of the fifteen participants felt that the retrenchments affected the survivors' **work attitudes** negatively. Key indicators of this were decreased **morale** and a drop in **motivation**. Some participants reported that this was not a short-lived experience and eight participants employed team-building efforts in an attempt to rebuild morale and motivation. Participant E: *"It's like a black cloud that settles over the whole organisation. And it's always been the case in the various retrenchments I have been involved in. And it goes on for months"*. Only one participant reported that the team-building efforts showed an almost immediate positive effect. Another participant found the results from climate surveys that she had conducted before and after the retrenchment as well as the fact that the Friday afternoons spent socialising in the company pub had drastically decreased, as indicators of a drop in morale and stated: *"We have a pub downstairs, previously it was frequented late on a Friday*

afternoon, lots of fun, a vibe and used for team building, not after though. So this and the climate survey were huge indicators to me". Participant J also made mention of the decrease in after hours socialising in his company.

Negative **work behaviours** also emerged as a common survivor experience to the participants in the form of absenteeism, a drop in performance and increased feelings of job insecurity. Following are examples of opinions offered for these negative work behaviours:

Five participants experienced an increase in **absenteeism**. In their opinion, this related to the negative feelings around the retrenchment process.

Ten of the participants experienced a **drop in performance**. Four of these participants qualified their statements by saying that survivors were overloaded with tasks and *"often without an increase",* as was the case in Participant A's experience. Others remarked that additional tasks resulted in performance dropping because they had to do work which they did not want to do or were not yet trained to do or were not yet accomplished at doing as per Participant C, who motivated his comment by saying *"people are trying to find their feet and find out how to do things more efficiently".* Some attributed the drop in performance to survivors being unable to concentrate as they felt concern for their colleagues who had been affected.

Just under half (seven) of the participants reported that survivors felt **less secure** about their jobs as is captured by Participant A's expression: *"I think people feel threatened, because they feel unsafe, they feel less secure".* Five participants mentioned that when the survivors saw anyone from the Human Resources Department, their immediate thought was that further retrenchments were imminent. Two participants mentioned survivors resigning. In this regard, Participant M for example stated that: "*but they don't take their CV's off the market, so what we do find is six months later, they get a call from an agency saying 'remember six months ago you've put a CV out with us, I have a great opportunity for you', and we lose people like that. Many of them will come in and genuinely say: 'when we went into the thing I*

thought: 'oooh hang on I better get my CV out' and then 'I have not been looking and suddenly the agency phoned' and then they go".

The majority of participants (11) noted survivors as expressing feelings and opinions on the retrenchment of their colleagues in the form of empathy, guilt, relief and envy. Six remembered survivors as expressing feelings of **empathy** and compassion for their colleagues, particularly when they were close friends or colleagues. In one instance, Participant Q stated that: *"Some believed that the wrong people were retrenched".* Four participants reported that they noticed survivors expressing feelings of **guilt** that they had survived and not their colleagues. A few participants (four) experienced survivors as having a sense of **relief** that they had not been retrenched. Only one participant reported survivors as being **envious** of their colleagues: "*Some of the survivors were envious of the packages; some were quite substantial. There were some big numbers flying around".*

In four instances, participants experienced **mistrust** either towards the organisation or towards the participants themselves as in encapsulated in Participant L's experience when training or other organisational activities were arranged and survivors refused to participate: "*It was particularly evident when opportunities for training were arranged. We tried green areas, quality circles etc, those things just never took off, people would just sit there and not participate, they were disillusioned, distrustful and disenchanted…We used to have long service awards and parties, we would get jazz artists in and we would take every one out. But that year, people just took their meat and went home".*

A few participants referred to experiencing the behaviours of some **survivors** as more **positive**. One participant attributed this to *"the excitement of new projects"* and another to the realisation that *"because they know if we don't all pull together and make a success of this job, not one of us will have a job".* Another participant attributed it to "*opportunities that existed in the new brand, so that helped a 'heck' of a lot. I also had good relationships with people, and they knew I wasn't going to tell them anything else than the truth and do*

anything I could to help them". This same participant also experienced how the employees rallied together and were prepared to all work without a salary and simply to stay operational, before the new owners took over: "*I get goose bumps when I think back. We heard from the banks that there was a possibility that we could not pay salaries that month, but everyone was prepared to jump in, we divided ourselves up to go and run the branches, we got up early in the morning and not one person had a problem with that, we just did it"*.

5.5.3.3. Implementers' Personal Reactions

This section discusses the **participants' own reactions** to the initial news of the retrenchment decision. Most (14) expressed personal feelings and thoughts about their own jobs. Examples of feelings of apprehension relate to one participant expressing feeling initial **concern for his job**: "*When you hear the 'R' word, the first thing you think about is yourself, self preservation, its human nature"*. In this participant's case his feelings of discomfort were such that he wanted to escape: "*I just wanted to run away and I still feel that way today"*. Another participant expressed similar feelings of discomfort: "*I just dreaded the time"*.

Three participants were **not concerned** about their positions for various reasons. Participant D felt that his goal was to make himself indispensable: "*My goal is to make my position indispensable. As long as I do that, they won't touch me, I am quite secure in that"*. He felt certain and secure of his value to his organisation, in the light of the role that he could fulfil: "*…we build the fat into the HR department, because there is a big focus especially, … the more people the more problems, so there will always be a job. It is such a labour intensive industry and business that you need the specialists"*. Participant F expressed that she knew that while she was not "*irreplaceable"*, she felt that she was "*invaluable"*. In Participant I's case, she knew that her job was not affected, because she was a new manager and one of her first tasks was to implement the retrenchment.

Four participants did not express a clearly positive or negative view. They did indicate awareness that change like retrenchment was a **reality** and that they always expected change to be a part of their roles as expressed by for example Participant K*: "Even I have come to expect it. I can be approached tomorrow".* Participant G took a proactive stance, given the fact that he had been part of many retrenchments: *"Every single time we do a restructure, then I pick up the phone and ask the head of HR: 'tell me upfront is the HR function going to be restructured or not?' If he says: 'yes', then you say: 'well, my position might change' but I think with any restructure, your position does change because you now have different areas you are looking after. Your job continuously changes in any case".*

Six participants expressed mixed feelings and thoughts. While they were concerned about themselves, they also saw **opportunity**, particularly since they were also all to be retrenched. Participant A encapsulates this experience: *"You obviously worry about yourself. How would it affect me? You also know that problems might open up opportunities for you, which is good news. Um… you go through a range of emotions".*

Some participants' (four) awareness to **self manage** and drive their own **careers** was highlighted by the retrenchment experience as expressed by Participant H: *"It also opened my eyes to my comfort zone and for the first time I started questioning me and my future",* and Participant Q: *"It could affect my future prospects too. It is important that we all have a plan B in the event of retrenchment which includes flexible and portable skills and competences, above average presentation skills to enable 'selling yourself' to prospective employers and an extra large dollop of self confidence to sometimes just jump in at the deep end!"*

The preceding section, presented the sub theme of the participants' personal experiences of the survivors' and victims' reactions to the news of the retrenchment decision as well as the participants' own experienced reaction to this news. The next section will discuss the sub theme emanating from the

research in relation to the participants' emotional experiences of the retrenchment conversation.

5.5.4. Emotional Experiences of the Retrenchment Conversation

Diverse reactions were obtained with regards to their emotional experiences. These relate to amongst others feelings of guilt and a sense of responsibility, experiences of decreased emotional wellbeing, role overload, role conflict, a sense of isolation and perceptions of self.

Four participants expressed experiencing **both guilt and responsibility** feelings. Nine participants solely expressed feelings of guilt and two expressed only feelings of responsibility in some form or another. Three participants expressed not experiencing any feelings of guilt and two participants expressed not feeling a sense of responsibility.

In the present study, reasons for experiencing **guilt** feelings included amongst others when participants were of the opinion that the company was not treating someone fairly and they had to do the *"dirty work"* on behalf of management who were using it as an opportunity to get rid of people. Those experiences left them "*feeling guilty and dishonest".* A couple felt guilty for *"letting people down",* and when they knew or were exposed to the victim's family and their circumstances. Some also felt guilt because when they reflected back to their first retrenchments, they wondered about whether they could have done more for the victims. One participant felt guilty, because she did not anticipate it and also because she was overseas at the time that the decision was made, feeling that she let people down by not being there then. A minority felt guilty because they still had a job. Another participant felt guilty because of the manner in which the victims were treated. Participant N felt a *"bit of guilt"* in the case of the employee who was killed in the motorcycle accident: "*because I thought maybe, had I given him a different answer to his question, maybe he wouldn't have done that*".

Three participants reported **not** experiencing feelings of **guilt** for various reasons: Participant G: *"I never ever felt guilty, I never allowed myself to feel*

guilty. If it is done with 120% integrity. In the beginning, years back in mining, it was difficult, but that had more to do with the integrity of the process and whether they were trying to get rid of someone. … It is only in exceptional circumstance that I would sit and worry further, but then my wife tells me I am a 'cold, clinical bastard', but I think for me it's just a part of your make-up". Participant L: *"I didn't feel a sense of guilt as much as I felt a sense of powerlessness and a sense of cynicism, because you went into HR, knowing you wanted to help people and now you end up hurting people",* and Participant M expressed that his feelings of guilt were tempered by the knowledge of *"making sure that we have done the right thing the right way. And that we are doing everything we can".*

Insofar as feelings of **responsibility** were concerned, participants expressed various reasons here too. Participant E's feelings of responsibility related to ensuring that she had thought of everything she could to ease the situation. Participant H felt responsible for *"changing someone's life course. You are an instrument and that is quite heavy and a huge responsibility"*, and Participant K also wondered about her role: *"You felt like you had failed in some ways, you didn't do enough as HR, you feel responsible, because you had employed these people, you had helped build the structures of the business. Could I have done something differently or better?"* Participant M expressed feelings of responsibility for both *"the company and for the person".*

All of the participants reported some form of decreased **emotional wellbeing**, with nine of the fifteen participants reporting sleep disturbances. One reported taking medication for insomnia and still having trouble with it, years after the retrenchment: *"I used my wife's sleeping tablets, now and again, just something to relax me and help me through the night. But that has started a habit now that I can't get out of. I wake up a 'hell' of a lot. I probably have an average of 4 hours sleep a night now. Now, 3 years later, I still worry about the company and month to month we look at the results and I think: 'oh gosh, it hasn't been a very a good month' and that worries me".*

Eight participants reported experiencing **burnout** in the form of **emotional exhaustion**, **fatigue and stress** from work. Following are examples imparted by some of the participants:

Participant E: *"I definitely had emotional injury. I had to take three months off for posttraumatic stress; they called it a nervous breakdown then"*. Participant J experienced burnout nine months after the retrenchment process: *"The reality just set in and for two weeks I was really low and I couldn't make decisions. So I would just sit and everything was just 'no'.* Participant A experienced *"heart palpitations due to the stress and gained a lot of weight during this time"*, whereas Participant M experienced: *"a lack of appetite"*.

Participant H experienced nervous tension, particularly in the early years of her experience with retrenchment, due to feelings of incompetence as another dimension of burnout: *"I was fearful of not knowing what I am doing"*, and Participant K stated experiencing *"being really exhausted at times, physically and emotionally. You were constantly being sucked into this negative energy as opposed to the positive stuff of your job and that was some of the hardest part"*.
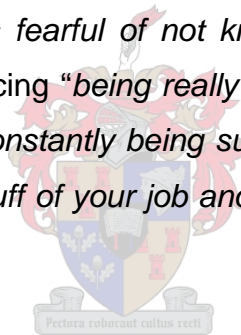
The majority (ten) of participants expressed working harder and experiencing **role overload.** All ten participants expressed it as due to expanded duties where the retrenchment implementation tasks occurred in addition to their daily duties. Participant A felt a sense of obligation and pushed herself: *"It's not nice, I found it professionally and personally very demanding. I was in charge of the head office with 300 people, I had to do the whole HR function without a secretary and I was in charge of psychological services countrywide and the clinics. And I was in charge of alcohol abuse. And I was one person and I was recruiting a new head office. I had to interview every single person. And I had very tight deadlines. And I had to leave at half past four, as I had to pick my 2-year-old up. I was too proud to drop the ball. It's not in my nature, because that would reflect badly on me so I would try and work hard and fast and more and quicker. I wasn't prepared to let my people suffer"*.

Nine of the fifteen found they were working longer hours to keep up with their duties and one experienced having to shoulder the responsibility for others. Two participants experienced working harder to escape from their emotions as a coping mechanism by way of disassociation.

Participant E, expressed dismay at her experience of role overload: *"I experienced role overload when I would just shout at everyone and then ask myself: 'who is that?' I didn't recognise myself".*

The majority of participants (nine) indicated that they experienced **role conflict** between work and home life, where the stress and resulting emotional exhaustion from the implementer act spilled over into family life. Five participants described how family relationships suffered where they withdrew from either their spouses or their children. Following are examples of the variety of experiences described:

Participant A: *"The day my dad passed away I thought: 'you know what…I am being a bad mom, I am being a bad wife, and I'm being a bad worker, for what'?"*

Participant H: *"Well, my marriage broke up as a result. I became emotionally absent for my husband. My husband said to me: 'you don't need me. I haven't felt like you needed me the last couple of years'. I was making all the decisions in the house. And I realised it came from my job. I saw that if you were going to get anywhere in this company and be one of the 'boys', this is how you make it, this is how you have to behave. And they saw that I did it well. Now they accept me. Now they respect my opinion and listen to me".*

Participant M: *"No I did not talk about it at home. I guess to buffer them. Work is work. I think they were probably quite relieved that I did not talk about it: 'Ag dad, tough day' [laughing]…so if there's distance it's more me than them withdrawing and also I guess my tolerance for things being at lower ebb. And going through that and then the guilt of it because my daughter would come and say 'dad, dad, I did this project at school' and me say 'that's very nice*

dear' and then 2 days later, think she was actually wanting to show me her project and I did not give her the space. 'Oh no, I'm a bad dad' [laughing]".

Insofar as **organisational isolation** was concerned, five participants experienced **lack of support** from their **immediate bosses**, which was a source of distress for them as encapsulated by Participant A: *"Your boss doesn't really care; you must just make it work. There was no insight…the day I resigned my dad died and they didn't phone me to say they were sorry. And the day I resigned they said to me, you know you should have spoken to us. I said: 'I wrote you three memos to say I need help'. And they didn't acknowledge it";* Participant F: *"When I told the CEO how I felt, he told me I was insubordinate and had a job to do and I must do it";* Participant J: *"But from the group MD, he just said I am overreacting, because I don't like what he is doing";* and Participant Q: *"I was disillusioned with the status quo and management style and clashed with my director on a number of issues".*

Four participants experienced **isolation** from the **victims**, who did not see things from the participant's point of view and in their opinion had no appreciation for what they as implementers were experiencing emotionally. Three participants recall being **negatively associated with retrenchments** when they were seen in the building as for example expressed by Participant E: "*some of the staff nicknamed me 'the lynch lady'.",* and Participant M*: "It got to a stage, where if I walk down the corridor, if I step into the corridor, it was full, by the time I got to the other end it was empty, people will just disappear: 'I don't want to be in [name] sight because if he sees me'…".*

Two participants reported experiencing **social isolation**, by virtue of the nature of the Human Resources Manager's job and so they were compelled to **isolate themselves** socially, as was reported by Participant A: *"It's a very lonely job, HR is like the 'dominee on site', you know all the 'skandes', but you can't talk to someone"* and Participant M: "*I had to be the strong one and I had to be the one that people would come and offload to…Sometimes you need HR for HR and that can be a bit of a lonely time to be in".*

Six participants received **support from others** within the organisation, from peers and colleagues, who were also tasked with implementing the retrenchment and a minority reported receiving **support at home**.

Also emerging within this sub-theme is a discussion of how participants perceived their **own actions of interacting** with the affected, that is, whether they treated the victims **sensitively** and with **empathy** and how those interactions and the feedback they received influenced their **self-perceptions** positively or negatively.

All fifteen participants expressed feelings of empathy and compassion for the victims' circumstances and this guided their interactions with them. This was particularly important for maintaining their sense of humanity and self-respect.

Nine participants expressed feeling satisfied with the way in which they conducted the implementation act as was for example expressed by Participant A: *"I would feel pride, if I achieved well under difficult circumstances. I would feel good about myself and what I am capable of, how I would handle and carry myself"*. This was particularly evident to them when they received positive feedback on the way that they had conducted themselves from the victims. A minority of participants (four) received direct feedback, for example, Participant A: *"the feedback I would get from people, so that would be nice, because people would say that I was nice to them, I was working for them and not for management"* and Participant C*: "two people at Company A, said to me 'thanks for the way you handled it, I realise how difficult it must have been for you', that was nice to get that feedback"*.

5.5.5. The Retrenchment Conversation

The next sub theme to emanate from the research was participants' experiences of the way their emotions impacted on how they **handled the retrenchment message**. Within this sub theme two further themes emerged. The first relates to **dysfunctional** conversations where participants experienced their emotions as undermining the treatment afforded the victims and the second relates to the **coping techniques** that participants used to

resist the dysfunctional effects of their own emotions, enabling them to regulate their emotions, maintain composure and treat the victims with sensitivity and respect when delivering the message.

5.5.5.1. Dysfunctional Conversation Types

Of the fifteen participants interviewed, eleven reported having difficulty coping some of the time and sometimes experienced **dysfunctional** conversations, where their emotions negatively directed their behaviour in delivering the retrenchment message. In these instances participants reported experiencing behaviour where they either unloaded emotions, were mechanistic, argued with the victims or tried to cushion the blow during the retrenchment conversation.

Insofar as **mechanistic** dysfunctional conversations are concerned, five participants found that they detached themselves from their emotions to such an extent, that they delivered the retrenchment news in a mechanical, inept, awkward and rigid fashion as is captured by Participant I's experience: *"I remember, I rehearsed the entire, what I had to say in the car driving to work. I knew the whole thing off pat. I sat him down and I just started, everything came out I did not even breathe, I just said 'nenenenena' and I just said the whole speech [deep breath] and then I thought: 'now I'm finished'. Meanwhile this poor guy just heard all this terrible news and I couldn't stop myself because I knew I just had to say it all and exactly what I had to say. I mean I didn't even give him a chance to interact. Afterwards [name] said to me: 'you know [own name], next time you should at least breathe'. I couldn't breathe and on top of it, I was 4 months pregnant so I was feeling pretty sick as well, so it was terrible".*

Four participants found themselves so overwhelmed by the task, particularly if they knew the victim well and could not stop themselves from **unloading** their emotion as is shared by Participant L: *"I remember I had to retrench a friend of mine. Actually we shared the same flat. We were great 'buddies', we went away for weekends in a group of us and I couldn't do this on my own. So I asked another mutual friend of ours who also works there: 'please just come*

and sit with me when we have this discussion'. So we sat down and this woman came in and she sat down and she started moving things around on the desk and she said: 'Ok, now say what you want to say'. And when she looked up, all three of us just started to cry. So we sat there and we sat there and we sat there and then she said: 'just give me the paper' and she walked out". Of these, two participants pointed out that in hindsight they had learned that *"crying with the victim was probably not the best thing to do".*

One participant recalls experiencing a dysfunctional conversation, where she had to stop the conversation before it escalated into a further **argument**: *"One guy was the most cocky, stubborn, difficult guy and I chased him out of my office one day, but he was simply unreasonable and he was probably the only person I ever chased out of my office because I was going to lose my cool with him. I just said: 'just get out now, please, I've said my bit, what the situation is. I've got nothing more to say to you on the matter'.".*

Insofar as **cushioning** the conversation to soften the blow of the retrenchment news, one participant expressed receiving feedback from her direct manager, who sat in on initial retrenchment conversations for coaching purposes of: *"…'don't be too nice and get too involved in their circumstances'…So I had to learn from that".*

5.5.5.2. Coping Techniques

Within the second theme to emerge from this sub theme of handling the delivery of the retrenchment message, all fifteen participants relied on **coping techniques** to reduce the dysfunctional effects of their emotions, thereby assisting them in maintaining composure and treating victims with interpersonal sensitivity and respect during some of the retrenchment conversations. Their coping techniques varied with examples of rationalising and justifying, quarantining emotions, releasing emotions and diverting attention being amongst techniques employed.

Rationalising emerged as mitigating coping behaviours in nine of the participant experiences. They rationalised that retrenchment was a necessary

part of their role and it was a decision made in the interest of the business and others remaining behind, as is encapsulated by Participant G: *"I have a responsibility to the organisation and to the people that are left behind, to make sure that they have every possible chance to succeed, otherwise we would be 'braaing tjops' during the middle of the week and nobody would have jobs".*

Two participants rationalised that retrenchment was increasingly becoming a "fact of life" as per Participant C*: "Retrenchment is a fact of life and as you get more experienced you realise that you may have to do it again, that's business".*

Six participants rationalised that they had no choice in the matter and empathised professionally to assist them in getting the job done as is captured by Participant A: "*It's not my fault that they are going through this. I was simply executing what the company required. I would be as professional as possible and as quick to minimise their pain and to enable them".*

In two instances, particularly with their first experiences of retrenchment conversations, rationalising reduced the level of empathy felt for the victims as is explained by Participant H: *"I came across as cold-hearted and I just went through the motions: 'lets just do it' and after a while I didn't feel emotions".*

Some participants rationalised by also focusing on the positive **opportunities** that the retrenchment would hold for the victim as is described by Participant A: *"where I would say to somebody: 'the situation you were in wasn't great, this is a new beginning… see it as a new opportunity' and my personal experience with retrenchment, every time I got a better job with better pay and a package. So wow, financially it was nice. It was horrible to go through, but I learned that there's life after retrenchment. And I could share that with them",* and Participant C: "*I would focus on the positive. I would talk about their skills sets and that I didn't think that they would have a problem finding work again. If the guy had entrepreneurial ability, I would say: 'you have always talked*

about this, maybe this is the break you needed to start your own thing'. That positive approach would help me cope with it better".

The majority (12) of participants intentionally and in some cases temporarily distanced themselves from the assault of their emotions by **quarantining** their emotions as expressed by, for example, Participant O: *"I put them in a box"*. This was attributed to the fact that they realised that they needed to be available emotionally to treat their victims with interpersonal sensitivity and respect during this time, yet maintaining enough professional distance to get the task done. For example, Participant A explains: *"There is a certain amount of detachment and yet a certain amount of feeling goes into it.* Participant C echoed this sentiment: *"You deal with it professionally on the outside, but inside you feel different, you just don't show it".* Participant E commented that: *"Biggest thing for me is to know that I care. Going in there and knowing that you are dealing with a human being who is so down at the moment and so battered and bruised and try and help them through it, not their or my fault, That is a person there who needed someone to help them, be empathetic, not too sympathetic".*

One participant found that he had difficulty and at times would go to extreme lengths to quarantine his emotions *"I depersonalised it…trying to think: 'what has the person done wrong?' So you can be angry at the person, distancing yourself, trying to break the relationship, prior to the discussion, in my mind".*

A variety of **diversion** techniques were also employed as a means of coping and to divert their attention away to something else other than their distress or that of the victim. This assisted in facilitating the delivery of the retrenchment message. Eleven participants focused their attention to **non-work related activities**. Three participants went on leave, two increased their alcohol consumption, one participant increased her smoking habit, four participants exercised and one read more books, to escape the intense emotion of retrenchments. A minority (two) reported relying on the **retrenchment script** and the pre-retrenchment workshop training to decide in advance what will and will not be said as a means to focus attention away from the experienced

negative demands, as explained by Participant N: *"You have script and you have to follow the script word for word. In the workshops, they told us: 'don't be emotional, don't be apologetic, it is really sticking to the facts. So that was the one-on-one, carefully scripted by me, notes being taken by HR. The retrenchee had an opportunity to speak and ask questions for clarification, but I treated the meeting very clinically, because that was how I was going to deal with it"*, and Participant I: *"I knew the whole thing off pat…I knew I just had to say it all and exactly what I had to say"*.

Another effective coping tool used by participants was to **release emotion**s either before or after the retrenchment conversation to their peers, colleagues or senior management at work. Some were able to release emotions at home and others sought psychological **counselling**.

Releasing before the retrenchment conversation helped the participants to prepare for the difficult task ahead. Seven participants maintained that support from **peers or colleagues** created opportunities to vent and discuss how they were coping or if they needed to offload afterwards; then this was the outlet available to them. Participant K for example shares her experience: *"The team I worked with was amazing. We would talk about difficult cases amoungst ourselves…and as regional managers we relied on each other to talk about things"*.

The knowledge that **senior members** in the organisation were also available to participants created another outlet to release emotions and a minority of participants (three) reported this to be the case in their organisations. In this regard, Participant J, for example, stated that: *"I am close with one of the group directors, who is also my direct boss and we talk a lot. That actually pulled me through. He pulled me through, because he understands it the way I do. We have an incredibly trusting relationship and understanding. He is a huge 'crutch' for me. He has guided me to deal with it"*. Participant K: *"We also had support from the national HR manager…so that helped because you realised that you always have someone to talk to if you get stuck or didn't*

know what to do". This left the participants with a sense that their needs and concerns were important and a feeling of being cared for.

Five participants reported not having opportunities to release emotions before or after the retrenchment conversation in the workplace with either colleagues or senior management and typically relied on their own capacity to manage their emotions as expressed by Participant A: *"Before the interview I would go to the bathroom, take a deep breathe, make a cup of tea, you know you've got to do this, so off you go and do it"*. Participant M, being the Human Resources Director and leading the process commented that: *"I suppose preparing others was a way to release emotions"*.

Six participants reported being able to **release their emotions at home** and gaining support and strength from spouses or other family members; which assisted them in coping and in alleviating the strain from the retrenchment task. For example, Participant D: *"In the beginning I would discuss it with my dad"*. Participant F shared: *"At home, it was a combination of listening, often taking over certain responsibilities and going out for dinner instead of cooking"*. Participant A stated that: *"I would talk to my husband; he's my best friend. I would go home to my husband and use him as a sounding board and a confidante, it's important to have someone to talk to"*.

In five instances, participants spoke of seeking professional psychological **counselling** on their own as a helpful means to release emotions as Participant E describes: *"I would make an appointment with the psychologist because I realised that's the way to do it. I went for six counselling sessions and it was very helpful, it turned me around completely. I learnt coping tools and to set boundaries, what's my responsibility, what's the managers' responsibility"*. These five reported that they only sought professional counselling after the retrenchments were completed, mostly because they did not think it necessary at the time of the retrenchment implementation, and only when their emotional and physical wellbeing, was affected did they then deem it appropriate and necessary as is described by for example, Participant F: *"Suddenly it caught up with me. I took advice, that I go and see a*

counsellor myself, which I did. It did help to see a counsellor, because you are not holding everything inside. I went quite a while later after the retrenchments", and by Participant H: *"I saw a psychologist last year after the divorce and obviously the retrenchments".* Participant L commented that: *"In the early days I didn't seek counselling. 'Asseblief, ek is 'n man!' I mean you are at that stage where you can conquer the world. With the merger, much later, I had a child and so my perspective changed. I now see a psychologist and he said to me: 'during our 20's and 30's these things don't have a visible impact, but it hits you when you hit your 40's".*

Two participants in hindsight suggested that professional psychological counselling was something they now thought would have assisted them in venting their emotions and dealing with the stress created by the retrenchment implementation task.

In the one instance that the organisation made psychological counselling available, Participant N, with regards to the fatal accident that saw him lose two work colleagues, commented that: *"At the time I didn't seek help. Talking to you now, I am surprised how emotional I feel about it now and how it is affecting me now. Maybe there is room for closure. Maybe I should talk to somebody about it. I didn't use the psychological counselling facilities offered. I didn't think I needed it, then".*

5.6. Implementers' Experiences of Enabling Strategies

The third and final central theme to emerge will discuss participant proposals of enabling strategies. In this regard two sub themes emerged. One being ways in which the **organisation** can **enable** and proactively **assist** them in preparation for their roles in handling the emotional dynamics of the implementation act and the second sub theme being suggestions on ways in which implementers could **personally prepare** for their role.

5.6.1. Organisational Enabling Strategies

Emanating from the organisational enablers were suggestions of **emotional support**, pre-retrenchment **training** or coaching and mentoring and psychological **counselling**, in preparation for the emotional challenges

participants may face in handling retrenchment conversations. All the participants agreed that a combination of these enablers would assist them in coping more effectively with their role in implementing the retrenchment conversation. Some participants also had a message for organisations for **preparing employees** in general for the **realities** of the **new world of work**, which included a view on the traditional practices of life-long employment and the changing **psychological contract.**

Nine of the participants did not experience **emotional support** and proposed that organisational support is vital throughout the retrenchment process. In their view this facilitated coping with the retrenchment process, as per for example, Participant G: "*support for the person that must break the news is important",* and Participant L: *"From an organisational perspective, they need to play a role in preparing you and supporting you".*

Participant A, backed her line of reasoning, saying that support would assist with the work load and associated stress and cited her personal experience of not having support: *"It was an unfair load. They could have come down and said to me: 'I see that you are writing repeated memos, are you coping?' … It would be nice to ask the person: 'are you coping?' You know: 'do you need help?' Without making you feel incompetent. Without making you feel that your career will be judged. You know as a result of: 'are you tough enough?' As a woman its doubly so. You know, can you do it as well as your male colleagues?"*

The majority of participants (14) commented that some form of **pre-retrenchment training** or coaching for the implementer is critical to the success of the retrenchment implementation. Some spoke of the training manner or method in which implementers were trained where seven participants suggested role-plays as an example of methodology to be employed, which in their opinion would provide practice opportunities. An example of such a view is expressed by Participant M: *"In preparing others, to the extent that I say 'let's walk through a script and let's role-play a little bit about what we are going to be seeing' and 'when you see this emotion, how*

do you think you are going to react to that? How do you think you could do better?' and that is preparing them", and Participant Q: *"We as the HR department…also trained them on handling the emotional aspects and gave lots of opportunity for role-plays to acquire skills. Some were reluctant and had to be 'forced' to undergo this training as they maybe underestimated the importance thereof. I would like to suggest that possibly one implements a 'buddy system' for 'at risk' managers to support them through the retrenchment process, especially new or young appointees".*

Six participants also commented on the value of **coaching** and **mentoring** as an enabling mechanism to equip implementers with skills in handling the retrenchment conversation more effectively as is encapsulated by, for example, Participant D: *"I think having a mentor or coach definitely helps"* and Participant L: *"I think they need to coach you or something and in it prepare you for what you can expect"*, and Participant O: *"I had no training to deal with this. I wish I had some sort of coaching on what to expect, what are the typical questions you would get and the kinds of emotions you can expect or at least have someone with you in the office when you break the news, because what if they have an emotional breakdown, how do you handle that?"*

The majority of participants (12) strongly supported **counselling** to deal with their own emotions and implementer role. Most felt that this also provided opportunity for emotional and psychological care and debriefing. Examples of individual participants' views include:

Participant H: *"I would definitely recommend that they go to someone, where they can 'pack out'. A lot of emotional stuff and stress builds up. You are directly responsible for changing someone's life course. You are an instrument and that is quite heavy and a huge responsibility".*

Participant K: *"Debrief counselling is good because it helps you get energy again and reminds you of your responsibilities and what your role is. Just to get perspective back again".*

Participant Q: *" I would like to suggest mandatory counselling for all managers and the union officials post the retrenchment with a follow up a few months later to ensure that they are not carrying guilt, stress or other baggage".*

The majority of participants (12) had a view on the **changing world of work** and the reality that *"jobs-for-life is a thing of the past".* In most instances, they were of the opinion that not enough was done to move towards the modern mindset of a *"relationship contract"* as opposed to the traditional contract. A minority of participants indicated that in their opinion, while retrenchments were indeed an increasing reality, business was more focused on the bottom line and survival than spending money on employee preparation for the realities of retrenchment in particular and the new employment contract in general.

One participant indicated that they did in fact prepare employees for the likelihood of retrenchment, but that was in his view due the nature of their employment relationships being short-term contracts. Another indicated that within the more sophisticated banking environment, it was common practice for employees not to spend too many years at the same bank and that *"banking being banking, there are only so many in this country",* he would be privy to CV's of employees who had rotated through all the banks and *"they would end up with us again".*

A minority of participants were of the opinion that employees and organisations had a shared responsibility to prepare themselves for the new world of work and they commented that this would seem to have implications for the unspoken and implied **psychological contract** that *"employers would take care of employees for life".* Examples of these sentiments are encapsulated below:

Participant A: *"Why do you wait for the company? Save yourself…if they haven't promoted you, it doesn't mean that they don't see it in you. I've had hard sessions with my people, told them to take ownership for their career, its okay to work for more than one company these days. I believe firmly…take*

charge of your career. I always say to people when I interview them: 'where do you want to end up? You have got 30 more years. And what do you need to get there? What training, what skills and your career must fit in like Lego blocks'. I am very passionate about this, I get very angry with people who are like a victim and sob and cry 'the company's not doing anything' [put on sob voice]. The company needs to pay money for labour, that's it".

Participant H: "*…there is so much happening in the global economy at the moment, you know business is changing… The unions did, after the last retrenchments. They came with a thing to say: 'look, they want an agreement in place that guarantees job security for the next five years'. And I said to them: 'are you insane? Now how on earth can we guarantee a job for five years? It's just not happening'… I said to them: 'you know you just cannot have anything like that anymore. As much as we would like to have a business in five years time, I cannot guarantee it'. So I worked hard to get that message out. I don't think anybody can expect to work here forever. They do expect to work here forever, but they know it's not a guarantee".*

Participant Q: "*I do not believe organisations always do what they would like to in terms of training and development to increase skills and competences because of the associated costs. In the same way individuals do not prepare themselves to manage their own skills through training and development, etc. because many just cannot afford to do so".*

5.6.2. Personal Preparation as an Enabling Strategy

All the participants were of the view that while having to break the news during the retrenchment conversation was tough, **personal preparation** for the conversation was key as it facilitated what they were going to say and in some cases (four), knowing the victims personally, seemed to make it *"easier"* as they felt that they would be in a position to determine the best approach for that individual situation. Participant C suggested the following in this regard: "*But one thing that I did think about is: 'how will this person react?' and depending on how well you know the employee, and so you may approach it*

accordingly. But I find I go into it thinking I am going to have to manage it situationally as it develops".

Insofar as **practical preparation** for the retrenchment conversation is concerned, all the participants suggested that they had a **structure** to follow and were prepared beforehand by ensuring for example that they had all *"their ducks in a row"* with information and answers to potential questions, all the related paperwork was ready, they were versed in the legal requirements, followed a script (if provided during pre-retrenchment training) and tried to remain as empathetic as possible. This bolstered their confidence in their ability to handle the retrenchment conversation as is captured by for example:

Participant H*: "I needed a 'hell' of a lot of help and I said to the directors: 'no problem, right, what do you want to do and how do you want to do it?', then I phoned everyone I know and I said: 'help'. So I put together a 'recipe', it was just a question of filling in the gaps. I then went back to the directors: 'Okay fine, what are your reasons? Give me everything' and they showed me financials, they showed me market share, they showed me everything and I put everything together. 'What are you prepared to offer as retrenchment packages?' they gave it to me. 'When you want to do this by?' and they gave me a date. And so, I got all the ingredients of the cake together. And I said: 'Okay, fine, now I had to phone the union. I phoned the union. I said: 'I will facilitate the meeting, but you need to come up with alternatives', they had questions, the directors answered it and that was fine. So the first retrenchment was the most difficult and from there it was really just following the process".*

Participant A: *"I would be helpful and cooperative. I would always be well prepared. Make sure everything is right for them, their confirmation of employment, UIF card, all their salary stuff, everything that needed to be done. I make the experience as painless as possible, having been retrenched myself, I realised what it does to people".*

Participant D: *"Also sticking to the letter of the LRA, so you must know it, just follow the process and then you know you are not going to deviate from it, if you go with a blank sheet, you will get distracted and you forget about the key aspects you have to cover. It is still the thing you take the greatest care of, you cover all the angles and you make sure that you don't make any mistakes because you are not just dealing with the law, you are dealing with someone who has worked for a number of years and who is going to lose his job. I would think about it at night before I go to sleep: 'what must I do the next day, what is the following step? What do I still have to do? What is the union's next step going to be? What else are they going to bring up, have I covered for everything? So it was more from a technical preparation aspect, but I did not really get anxious".*

Participant M: *"Preparation is key. Have a structure. I do a Gant chart, with details, which is probably my safety blanket. There are three layers to this thing; there's legal, there's the process, and there's emotion. Preparing for each of those very clearly. And then it would also be; don't be afraid of the emotions, don't be afraid of the emotional side of the situation. Very often people are scared to 'go there' and it's when you 'go there' that it actually makes it easier for both parties. So get in there, once you've got that news on the table then work with it. I would do a lot of planning. The next steps and so on. I would make sure there is a lot of structure. Not only for me, but also for the benefit of the managers who had to do the implementing and for the victims. Until you get to a point where you think: 'Okay, I have dealt with that Okay and got through that'.".*

5.7. Summary

This chapter documented the results obtained from the fifteen in-depth interviews conducted with participants who have played the role of implementer in their organisation's retrenchment processes.

The chapter provided three central themes with related sub-themes. The first central theme to emerge was the participants' experiences of the procedural aspects of retrenchment, namely s189 of the Labour Relations Act, 66 of

1995, (as amended). The second central theme focused on the participants' personal experiences of having to enact the implementer role and the final central theme to emerge focused on enabling strategies.

In the following chapter (Chapter 6) the results that were presented here are interpreted and discussed.
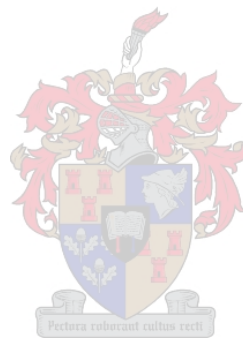
CHAPTER 6: DISCUSSION OF RESEARCH RESULTS

6.1. Introduction

In this chapter the research results, as presented in Chapter 5, are discussed and interpreted in the light of the literature review (Chapters 2 and 3).

In discussing the themes, the researcher will offer a sample of direct excerpts from the data (interview text). These excerpts provide an awareness of the depth of experiences as it has been lived by the implementers.

The discussion begins with the implementers' experiences of the procedural aspects as per the legal requirements in the South African legislation, namely s189 and s189A of the Labour Relations Act, 66 of 1995 (as amended) pertaining to retrenchments. This is followed by the personal experiences of the implementers. The final discussion point of this chapter relates to organisational and personal enabling strategies that proactively assisted in preparing implementers for their role.

6.2. Procedural Experiences of the Retrenchment Initiative

The core theme to emerge in the analysis of implementers' experiences of the **procedural** requirements suggest that in **most cases** the procedures were followed as per s189 of the Labour Relations Act, 66 of 1995 (as amended), amplified by the Code of Good Practice: Dismissal Based on Operational Requirements which codifies the principles dealing with dismissals for operational requirements (Thompson & Benjamin, 2006). From the analysis of the findings, it is noteworthy to qualify the findings in that a minority of the participants experienced full compliance, some experienced limited compliance and some experienced no compliance with the application of the various provisions of s189. This could be interpreted as either the retrenchment decisionmakers (senior management) are unaware of the provisions of s189, or they selectively and perhaps willfully applied the provisions of s189. In addition the findings could also be interpreted as the implementers not advising the decisionmakers properly. The following examples are offered in support of the extent to which the proper procedures were followed.

With regards to whether the **business goals** were achieved against the suggested "operational requirements", five participants disagreed and four were undecided as to whether business goals were met. Their view was that while there were short-term benefits, there might have been longer-term losses; some felt that there was a downside to achieving stated business goals and that was the human impact of retrenchment. Alternatively some suggested that the emotional costs were often ignored in the business rationale. These experiences are validated in the literature, where authors indicate that the people dimension is often marginalized when implementing retrenchment programmes (Cameron, Freeman & Mishra, 1993; Folger & Skarlicki, 1998; Kets de Vries & Balazs, 1997). Participants also mentioned that in the months post the retrenchment, employees where either contracted back on a consulting basis or re-employed because of critical skills lost or because of a shortage of manpower, particularly if there was an increase in business. This resulted in organisations' wage and salary bills increasing again and implementers questioned the long-term success of employee cuts. The literature bears up this experience (Cascio, 1993; Evans, Gunz & Jalland, 1996; Kets de Vries & Balazs, 1997).

The majority of participants (12) experienced their management as **already having made the final decision to retrench even before consulting** with the other consulting party. This would seem to be supported by their experiences of the organisational management style which was characteristically autocratic as per the experiences of eight of the implementers: *"they knew where they wanted to end up and pushed hard to get there"* and/or paternalistic, i.e.: *"we knew what was the best thing to do"* as was the case in two of the participants' experiences. Insofar as the provision of s189 relating to the contemplation stage of retrenchments (Thompson & Benjamin, 2006) (refer Chapter 2), the employer should approach the possibility to retrench with an open mind. The participants' experience is therefore in contrast with what the Code of Good Practice suggests with regards to the initial contemplation stage of a retrenchment decision.

While the majority of participants experienced **some form of consultation** on amongst others reasons offered for the necessity to retrench, discussions on measures to avoid dismissals, minimise the number of dismissals, change the timing of dismissals, ways to mitigate the adverse effect of the dismissals and feedback regarding suggestions offered by the other consulting party, they differed in their experiences as to whether consultations were meaningful and whether there was a concerted attempt at consensus seeking. The researcher therefore cannot categorically state that consultation took place within what the spirit of the Code of Good Practice intended.

Insofar as the **criteria for selection** is concerned, while nine of the participants experienced the application of poor performance as one of the processes to select employees out, seven of the participants however experienced it as a subjective process and an unfair selection mechanism. In their opinion, poor performers or *"people with attitude"* or other unwanted employees were managed out of the company under the guise of retrenchment and they preferred that the organisations made use of their performance management processes more effectively, when it came to managing poor performance. This is contrary to the legal requirements that any selection criteria can be used, subject to it being objectively ascertained (Roskam, 2002). Issues of justice, specifically procedural justice, which refers to the perceived legitimacy of the retrenchment, that is, perceived fairness of the processes used to implement the retrenchment decision (Brockner, 1992; Greenberg, 1987) is also supported by the literature.

With regards to the experiences of **severance pay offered** to the employees likely to be dismissed, while the provisions of s41(2) of the Basic Conditions of Employment Act 75 of 1997 (as amended) does prescribe a minimum severance pay, it does not differentiate between levels of seniority. Some of the participants experienced unfairness in that senior management received more than the minimum requirements and junior staff received the minimum in terms of severance pay. The literature in terms of distributive justice refers to the experiences of perceived fairness of the allocation of rewards in this regard (Brockner, 1992; Greenberg, 1987). Further to the offer of generous

severance packages, management in four participants' experiences, found that *"the good apples applied and wanted to leave"*, resulting in the *"wrong employees"* leaving and so stepped in to impose a deadline as was the experience of one participant or to *"accommodate"* other employees as was the experience of another participant. In this instance, management tried to dissuade the loss of certain employees who were applying for voluntary retrenchment. This too influenced the perceptions of fair (distributive and procedural justice) treatment of employees by participants. The literature cites various examples of justice issues in this regard (Brockner, 1992; Greenberg, 1987; Noer, 1993; Noronha & D'Cruz, 2005, 2006).

A minority of participants (three) experienced **no assistance being** offered to affected employees. This is in contrast to the provisions of s189 (Thompson & Benjamin, 2006) and aggravated participants' experience of unfair treatment of employees in terms of distributive justice. Various authors in the literature (Brockner, 1992; Greenberg, 1987; Noer, 1993; Noronha & D'Cruz, 2005, 2006) support this finding on distributive justice.

A minority of participants expressed dissatisfaction with the role that senior management played in being involved in the notification and **communication** processes of the retrenchment decision as well as the poor **treatment** (lack of dignified and respectful treatment) of employees. This aggravated their experience of unfair treatment of employees and is supported by the theory on informational and interactional justice respectively (Brockner, 1987; Brockner & Wiesenfeld, 1996).

6.3. Implementer Personal Experiences of the Retrenchment Initiative

In all cases, participants experienced their organisations as expecting them to ensure **legal compliance** as per s189 of the Labour Relations Act, 66 of 1995 (as amended) and in most cases to personally implement the retrenchment and answer all the questions that followed.

Most underwent **procedural training** on what to say and what not to say and a minority of participants experienced training or coaching on what they could

expect in terms of the emotional reactions from the victims in preparation for this task. Despite their training, only a few of the implementers experienced some form of experiential training or coaching on **preparing them to handle the dynamics of their own emotions.** This experience is supported in the literature (Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2005, 2006; Wright & Barling, 1998) The majority of participants (14) commented that some form of pre-retrenchment coaching or training for the implementer is critical for the success of the retrenchment implementation. The reader is referred to the section on organisational assistance below for more detail in this regard.

The literature reports on the implementers' experiences of the victims and survivors reactions to the news of the retrenchment decision as well as the implementers' own reactions to the news of the retrenchment. The following provides a description thereof.

With reference to the **victims**, the majority (14) of participants in the study experienced a variety of victims' **negative** emotional reactions to the news of retrenchments. Examples of reactions experienced include amongst others shock, initial denial, surprise, panic, blame, anger, threats, bitterness, sabotage, crying and screaming. The literature supports these findings and refers to the social, psychological and medical effects of unemployment (Fryer & Payne, 1986, cited in Wright & Barling, 1998) as well as the negative emotional reactions of victims (Molinsky & Margolis, 2005, 2006; Noronha & D' Cruz, 2005, 2006; Wright & Barling, 1998).

Five participants experienced victims as having **positive** reactions to the initial news of their retrenchment. Attributed reasons were because victims wanted to use their package to pursue their own business interests or looked forward to early retirement or saw the experience as an opportunity to grow from. Examples of these positive experiences are borne out in the literature review (Appelbaum, Close & Klasa, 1999; Arthur, 1994; Leung & Chang, 2002; Noronha & D'Cruz, 2006; Thornhill & Saunders, 1997).

It is also mentioned in the literature that termination plans in the form of victim aftercare or assistance mitigates negative experiences and reactions to the retrenchment implementation (Appelbaum, Close & Klasa, 1999). While the majority of organisations **offered assistance** to the victims, it is not clear in the present study whether the majority of implementers experienced victims' negative emotional reactions to the termination plan. Only one participant mentioned that victims did not make use of *"exit strategies"* because they were *"too hurt"* by the retrenchment experience.

The majority of participants (14) experienced **survivor negative work behaviours and work attitudes**. Examples include a decrease in morale and performance, an increase in absenteeism, feelings of job insecurity and mistrust of management and expressions of survivor guilt, empathy, relief and feelings of envy. These experiences of negative survivor reactions is cited in the literature as expressions of "survivor syndrome" (Appelbaum, Leblanc & Shapiro, 1998; Brockner, 1992; Brockner, Grover & Reed, 1990; Brockner, Grover, Reed & Dewitt, 1992; Cameron, 1994a, 1994b; Cascio, 1993; Cooper, 1994; Dupuis, Boucher & Clavel, 1996; Kaye, 1998; Kets de Vries & Balazs, 1997; Kinnie, Hutchinson & Purcell, 1997; Noer, 1993; O'Neill & Lenn, 1995; Wright & Barling, 1998).

Evidence of **positive survivor reactions** was reported in a minority of participants' experiences. The literature review also provided examples of positive survivor reactions (Caudron, 1996), particularly when retrenchments were handled effectively in the form of for example a survivor support plan (Appelbaum, Close & Klasa, 1999; Appelbaum & Donia, 2001). What is not clear in the present study however is whether this was due to organisations having a survivor support plan in place. It would seem to relate more to differences in personality traits and thus psychological adaptation through the mourning cycle, where those who had a fighting spirit were driven by hope and opportunities (Kaye, 1998).

Eight participants reported using team-building workshops as part of efforts to regroup, rebuild morale, refocus and steer the survivors through the

retrenchment into the new environment. Despite these efforts, only one participant reported experiencing almost immediate positive effects due to the team-building efforts. Some specifically reported experiencing survivors as being reluctant to participate in training efforts or other attempts to improve morale in the aftermath of retrenchments. In their opinion this was due to the unsettling effects of the retrenchments. The research findings by O'Neill and Lenn (1995) support these experiences and they comment that the aftermath journey is characterised by anger, confusion, hostility and hope. What is not clear from the present analysis is whether team building efforts were part of a pre-determined survivor plan as is suggested by supporters of having a well thought through longer-term retrenchment plan, which includes a termination plan (for the victims) and a survivor plan (Appelbaum, Close & Klasa, 1999; Appelbaum & Donia, 2001).

Participants reported on their **own initial response** to the news of retrenchments where the majority (14) indicated having thoughts and feelings about their own jobs. A minority (3) expressed not being concerned about their own jobs, whereas others expressed a mixture of feelings, moreso because they were of the view that retrenchment was part of change and the realities of the new world of work. Six of the participants expressed seeing opportunity due to the retrenchment experience, particularly because they too were to be retrenched and four indicated awareness of taking responsibility for self-managing their careers. This experience would relate to the literature review on employee awareness of the new employment and psychological contract and the role that they need to play in becoming employable (Arthur, 1994; Arthur, Hall & Lawrence, 1989; Gottlieb & Conkling, 1995; Leung & Chang, 2002; Sandler, 2003; Thornhill & Saunders, 1997; Waterman, Waterman & Collard, 1994).

Wright and Barling (1990) suggest that implementers of retrenchment experience their role as both professionally and personally demanding (refer Chapter 3). The findings in the present study verify this impression, where participants indicated that upon **being tasked with the implementer role**, they reported experiencing a range of thoughts and emotions relating to the

task and to coming to terms with their role in having to implement the task. In the majority of experiences this was a negative duty to perform. Specific examples of reported experiences relate to amongst others feelings of being unprepared for the role, concern over delivering retrenchment messages to colleagues with whom they were closely acquainted and emotional feelings of for example empathy, sadness and guilt. Some reported feelings of discomfort with the role, particularly where they were of the view that they were caught in the middle of their responsibilities to the organisation and to their employees. The experience as reported by the implementers in the present study is supported in the literature (Dewitt, Trevino & Mollica, 2003, cited in Grunberg, Moore & Greenberg, 2004; Folger & Skarlicki, 1998; Kets de Vries & Balazs, 1997; Mishra, Spreitzer & Mishra, 1998; Molinsky & Margolis, 2005; Noronha & D'Cruz, 2005, 2006; Sloan, 1996).

Some participants reported **mixed feelings**, because they knew that they had a responsibility to the organisation and to those affected by the retrenchments, that is, the victims and survivors. On the positive side, some reported that they knew that the role that they played in the successful implementation of retrenchments was directly related to the future of the organisation and those remaining behind and then there were those participants who reported that opportunities posed for those who were to be retrenched, were potentially bigger and more buoyant than the victims' current reality. These experiences are supported in the literature (Clair & Dufresne, 2004; Klinger, 2003; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2005, 2006).

Other authors in addition report on the long lasting effects of having to implement the retrenchment (Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis; 2006; Noronha & D'Cruz, 2006; Wright & Barling, 1998), where they were reminded of their role in the retrenchment process in the aftermath thereof. This was particularly so in the case of a minority (3) of participants who reported that when survivors saw them, they were either specifically avoided or comments were made about their being seen in the building as is encapsulated by a participant's comment

who experienced the title of the *"lynch lady"*. Examples of implementers being ascribed negative "titles" or stereotypes abound in the literature (Mishra, Spreitzer & Mishra, 1998; Sloan, 1996; Wright & Barling, 1998).

Further to the personal experiences of the implementer role, their **emotional experiences** during the retrenchment process also requires attention. The majority of participants in the present study reported experiences of negative feelings. Participants referred to experiencing a variety of emotions. Examples of stated negative feelings include the following:

Guilt and a sense of responsibility: *a). "You felt like you had failed in some ways, you didn't do enough as HR, you feel responsible, because you had employed these people, you had helped build the structures of the business. Could I have done something differently or better?" b). "I felt a sense of guilt definitely, if I think back now, in those early days, there was so much more I could have done. There was one chap, same age as my husband, his wife was my age, I met them and I got to know them, their kids were my kids ages, he just bought a new house, just signed for the bond and 3 days later we told him he's going to be retrenched".*

Decreased emotional wellbeing: *a). "I definitely had emotional injury. I had to take three months off for posttraumatic stress; they called it a 'nervous breakdown' then". b). "Yes I lost sleep, in fact you just don't go to sleep. This was so emotionally draining".*

Role overload: *a). "I remember there were times that I didn't know if I was coming or going. You were still required to do the rest of your job and this retrenchment was hugely time consuming". b). "Yes, absolutely massive. I probably work a longer than average day anyway but 'ja' I would easily be working a 14 hour day…. so there's been a situation, I am doing this, and I'll do this and that and I'll have to this and then take some of it home and do that. And that's a very big overload".*

Role conflict: *a). "Well, my marriage broke up as a result. I became emotionally absent for my husband. My husband said to me: 'you don't need me. I haven't felt like you needed me the last couple of years'…". b). "You go home and you have nothing left to give. You have no capacity to deal with your spouses emotional needs".*

Sense of isolation: *a). "With time I became resigned to the way we operate, because to try and fight someone in a position of power was pointless. When I told the CEO how I felt, he told me I was insubordinate and had a job to do and I must do it". b). "I was isolated from both the management team and staff at times as it was impossible to keep both parties happy all of the time. The managers believed I was not firm enough and the staff believed I was not able to 'protect' them. I was disillusioned with the status quo and management style and clashed with my director on a number of issues".*

The participants' form part of the surviving group of stakeholders. It could therefore be postulated that the negative emotional experiences are in some instances comparable to the symptoms of "survivor syndrome" as experienced by survivors. Evidence of this is suggested in the literature on the symptoms of "survivor syndrome" in remaining managers (Newell & Dopson, 1996).

With regards to positive emotions, those participants who received **positive feedback** from victims on how they handled the retrenchment conversation influenced their self-perceptions positively. All fifteen participants expressed having feelings of empathy and compassion, which further contributed positively to their sense of humanity and self-respect. This finding is well supported by the literature (Beehr, 1995; Beehr, Welsh & Taber; 1976; Brockner, Tyler & Cooper-Schneider, 1992; Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Kopelman, Greenhaus & Connolly, 1983; Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2005, 2006; O'Neill & Lenn, 1995; Stewart & Barling, 1996; Wright & Barling, 1998).

An interesting finding is that despite the negative emotional experiences of the majority, only one of the implementers indicated a desire to leave the organisation to escape the intense emotional discomfort associated with implementing retrenchments, a result which is in contradiction to the findings of a study by Grunberg, Moore and Greenberg (2004). As indicated earlier, this related to amongst others some expressing seeing opportunity within the retrenchment process, some being unconcerned about their job security and others indicating an awareness of career self management.

Concerning the implementer **experiences of the retrenchment conversation**, previous researchers have highlighted what is termed as **dysfunctional conversation types**, where the experience of their emotions, negatively directed implementer behaviour in delivering the retrenchment message, thereby undermining the treatment afforded the victims (Molinsky & Margolis, 2006). Eleven of the participants reported experiencing dysfunctional conversation types during their retrenchment conversations some of the time. The following section discusses excerpts of implementer experiences of dysfunctional conversation types.

In qualifying their stated experiences, five participants attributed having **mechanistic** conversations, for example, to a range of reasons. Reasons offered varied from amongst others their inexperience, being by nature task focused and needing to get the task done as quickly as possible before moving onto the next retrenchment victim, being unprepared for their discomfort or being untrained in having to deliver the retrenchment message. The following excerpt provides an example of a mechanistic conversation type: *"I remember, I rehearsed the entire, what I had to say in the car driving to work. I knew the whole thing off pat. I sat him down and I just started, everything came out I did not even breathe I just said 'nenenenena' and I just said the whole speech [deep breath] and then I thought: 'now I'm finished'. Meanwhile this poor guy just heard all this terrible news and I couldn't stop myself because I knew I just had to say it all and exactly what I had to say…"*. These experiences are supported in the literature review (Molinsky & Margolis, 2006).

Four participants found themselves so overwhelmed by the task, particularly if they knew the victim well and could not stop themselves from **unloading** their emotion as is encapsulated by one participant who stated: *"…and when she looked up, all three of us just started to cry…".* This is supported by the literature, where negative feelings stemming from for example a distaste for one's role (Wright & Barling, 1998), empathy with the employee (Grunberg, Moore & Greenberg, 2004) and a strong sense of helplessness, particularly when they shared good relations with employees, contributed to the stress experienced by the implementers (Grunberg, Moore & Greenberg, 2004; Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2005, 2006; Kets de Vries & Balazs, 1997; Wright & Barling, 1998). In their research Molinsky and Margolis (2006) add that while releasing emotions before and after a retrenchment conversation is encouraged as a useful means of coping and dealing with emotions, unloading during a conversation is inappropriate and dysfunctional as it indulges the implementer's emotions thereby shifting the focus from the victim to the implementer.

A minority of participants indicated experiencing dysfunctional conversations pertaining to **arguing** or **cushioning** the blow of the retrenchment decision. This experience is in contrast to what the literature would suggest (Molinsky & Margolis, 2006).

The majority of participants relied on **emotion-focused coping techniques** or behaviours to reduce or resist the dysfunctional effects of their emotions, which also assisted them in maintaining composure and treating the retrenchment victims with interpersonally sensitive treatment (i.e. sensitivity, dignity and respect) during the retrenchment conversation. This is borne out in the relevant literature (Lazarus & Folkman, 1984; Molinsky & Margolis, 2006 Noronha & D'Cruz, 2005, 2006; Wright & Barling, 1998). Molinsky and Margolis (2006) termed these coping techniques as justifying one's actions, quarantining emotions, releasing emotions and diverting attention.

Providing **justification** for or rationalising one's role helped reduce the guilt and personal distress implementers experienced in causing distress to others.

The reasons varied, where several justified their actions in that they had a job to do and that it was a decision made in the interest of the business and the survivors who remain behind. Others rationalised that retrenchment was increasingly a fact of life and that this would not be the last time that they would be doing this. Some rationalised that they had no choice in the matter and empathised professionally to assist them in getting the job done. A few rationalised by focusing on the positive outcomes and opportunities that the retrenchment presented for the survivors. Although justifications and rationalising are useful to lessen the guilt experienced by implementers, Molinsky and Margolis (2006) mention a potential downside, where justifications could reduce the level of empathy felt for victims, which may result in less compassionate treatment. This was to be the case in the minority (2) of participants' experiences and in their opinion occurred during the initial experiences of having to implement the retrenchment conversation. The literature supports the explanation of implementers' inexperience and suggests that there may be differences in how inexperienced and experienced implementers cope in handling retrenchment conversations (Molinsky & Margolis, 2005).

The majority of participants (12) used **quarantining** coping techniques as an intentional strategy to regulate emotions so that they could be emotionally available for victims, that is, to treat them with the necessary interpersonal sensitivity and respect, while simultaneously maintaining enough professional distance to get the task done:

a). *"You deal with it professionally on the outside, but inside you feel different, you just don't show it".* b.) *"I would just pack my emotions in a box, especially when you realise that you can't do anything about it".*

One participant found that he would go to extreme lengths to quarantine his emotions: *"…I tried to think: 'what has the person done wrong? So you can be angry at that person, distance yourself, trying to break the relationship prior to*

the discussion in my mind". These experiences are supported in the literature (Molinsky & Margolis, 2006; Noronha & D'Cruz, 2005, 2006).

Releasing emotions before and after retrenchment conversations are mooted as another coping technique by Molinsky and Margolis (2006) and supported by the research of Grunberg, Moore and Greenberg (2004). Eleven of the participants found this useful to facilitate the delivery of the retrenchment message and would vent to peers, colleagues and in some cases at home. The following excerpts encapsulate these experiences:

a). *"We relied on each other for support and would discuss difficulties amoungst ourselves. I knew I could approach the HR guy if I needed to…".*
b). *"The team I worked with was amazing. We would talk about difficult cases amoungst ourselves".* c). *"…I would talk to my husband; he's my best friend. I would go home to my husband and use him as a sounding board and a confidante, it's important to have someone to talk to".*

In a minority of cases senior management were available to participants, where participants found their involvement to be comforting and providing a sense of not being alone in sharing the distress of the retrenchment. They also felt that it lightened their feeling of responsibility as documented in the following example: a). *"I am close with one of the group directors, who is also my direct boss and we talk a lot. That actually pulled me through. He pulled me through, because he understands it the way I do. We have an incredibly trusting relationship and understanding…".* The impact on their experiences of senior management availability is also mentioned in the literature (Molinsky & Margolis, 2005; Noronha & D'Cruz, 2005).

A minority of participants (5) sought professional psychological counselling in an attempt to deal with the emotional distress experienced. This avenue was only sought post the retrenchment process and in most cases, after a significant period of time*: a). "I took advice, that I go and see a counsellor myself, which I did. It did help to see a counsellor, because you are not holding everything inside. I went quite a while later after the retrenchment".* In

only one instance was counselling offered by the organisation to the implementers as a means to facilitate the implementer role. As mentioned, in five instances, participants reported seeking counselling on their own. One participant mentioned that counselling facilitated the setting of boundaries for where her responsibility started and ended. Grunberg, Moore and Greenberg (2004) reported on the value that professional counselling assisted with dealing with the distress created by the enactment of the retrenchment act.

Eleven participants **diverted their attention** to non-work activities in a bid to focus on something else other than their own distress or that of the retrenchment victim. Examples include exercising, going on holiday, leisure activities, reading books and social activities: *a). "After the burnout, I took two weeks leave and went to watch my son play in an international golf tournament". b). "I would fill my weekends with things to do, so that I don't have to deal with it. Did I drink more? Yes, at that young age, you deal with anxieties differently, you just start to party harder". c). "We always had a very active social life, so I would just talk trivial stuff to my friends…".* These examples of diverting attention to non-work related activities as a coping technique is supported in the literature (Molinsky & Margolis, 2006; Noronha & D'Cruz, 2006; Stein, 1996).
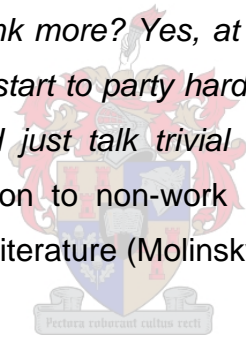
A minority of participants (2) focused on their retrenchment script provided during pre-retrenchment training workshops as another means to focus attention away from experienced negative demands. This behaviour as a coping technique is supported in the literature (DuBose, 1994; Molinsky & Margolis, 2006; Odendahl, 2003; Watters, 2004).

6.4. Organisational and Personal Enabling Strategies

In line with the literature review, the role that organisational and personal enabling strategies can play in preparing implementers for the challenges they may face in handling retrenchment conversations is discussed next.

All participants in the study were in agreement that organisational emotional support, pre-retrenchment training or coaching and psychological counselling

were vital to their success in fulfilling the implementer role. The majority of participants indicated that they did not receive **sufficient or any organisational emotional support** as is captured by one participant who stated that: *"it felt like they didn't care about you…it would be nice if somebody asked you: 'are you coping?'"* The notion of organisational emotional support is suggested as a significant buffer against work stress (Cohen & Willis, 1985) and the participants' experiences is echoed in the literature by participants in the study conducted by Wright and Barling (1998).

The majority of participants' indicated that pre-retrenchment **training,** as part of organisational support is critical to handling the implementer role successfully. Only some received pre-retrenchment training. In the majority of these instances, the training focused on the legal procedures pertaining to retrenchments. In a minority of instances the training also focused on the emotional responses of the retrenchment victims and even less attention was paid to assisting the implementer to deal with their own emotions: *a). "I think they need to coach you or something and in it prepare you for what you can expect. Not just the legal stuff".* This is supported in the relevant literature (Folger & Skarlicki, 2001; Grunberg, Moore & Greenberg, 2004; Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2006; Noronha & D'Cruz, 2005, 2006; Stein, 1996; Wright & Barling, 1998).

All the participants had views on training in preparation for retrenchment conversations. Examples of suggestions include "on-the-job" coaching, "just-in-time" training and workshops. Some participants indicated suggestions to improve the efficacy of the training methodology. In their opinion customisation for experience levels and role-plays for example would facilitate the reality of the retrenchment conversation, exposing them to the range of emotions they are likely to experience during a retrenchment conversation: *"I think emotional intelligence development would be helpful. Reading literature is also good. Customise the training; I was a young manager the first time. Perhaps do role-plays".* Suggestions as proposed by participants in the present study are reflected in the literature (Mishra, Spreitzer & Mishra, 1998;

Molinsky & Margolis, 2006; Noronha & D'Cruz, 2005, 2006; Schroeder, retrieved August, 31, 2006; Watters, 2004).

Despite their role in the successful implementation of retrenchments, in only one instance was psychological counselling offered by the organisation: *"I didn't have counselling, although it was available. Now I think I may go… closure is good".* The literature would suggest that implementers often need counselling in dealing with their own guilt and stress (Grunberg, Moore & Greenberg, 2004; Mishra, Spreitzer & Mishra, 1998; Modise, 2002), as it allows those responsible for implementing the retrenchment programme the opportunity to ventilate and dissipate their feelings in a safe and appropriate setting (Appelbaum & Donia, 2001; Modise, 2002). Other authors (Kets de Vries & Balazs, 1997; Molinsky & Margolis, 2005, 2006; Noronha & D'Cruz, 2005, 2006; Wright & Barling, 1998) continue to add that organisations need to acknowledge that implementers need some form of assistance to facilitate how they cope with the stress associated with the implementer role.

The majority of participants (12) expressed a view on the **changing world of work** and the implications for the traditional **psychological contract** within the reality of retrenchments that *"jobs for life can no longer be guaranteed and is a thing of the past".* Some participants were of the view that the responsibility for career management was a joint one between employers and employees. In terms of preparing employees for employability, participants referred to the role that they have played in career guidance for subordinates. On the other hand, they were of the opinion that employees also need to learn to self-manage their careers and to ensure their skills were such that they were employable. They also were of the view that this would perhaps better prepare employees to cope with change like retrenchments. Various authors support these views (Arthur, 1994; Arthur, Hall & Lawrence, 1989; Fowke, 1989; Gottlieb & Conkling, 1995; Kets de Vries & Balazs, 1997; Krecker, 1994, cited in Fowke, 1989; Leung & Chang, 2002; Sandler, 2003; Schein, 1996; Thornhill & Saunders, 1997).

Relating to **personal and practical preparation** for the implementer role, the majority of participants (some in hindsight and due to initial implementer experiences) reported on the value of investing time in personal preparation: *"make sure you have your ducks in a row".* They suggested that part of personal role preparation required having for example answers to potential questions ready, having all the related paperwork ready, being versed in the legal provisions of s189, following a retrenchment script, and trying to remain as empathetic as possible. In their opinion, personal preparation bolstered their confidence to handle the retrenchment conversation. This is supported by the literature (DuBose, 1994; Schroeder, retrieved August, 31, 2006).

6.5. Summary

This chapter offered a discussion of the findings obtained in the study. This discussion commenced with the first theme offering a discourse of the implementers' procedural experiences as they relate to s189 of the Labour Relations Act, 66 of 1995 (as amended). The second theme focused on the implementer's personal experiences of having to implement the retrenchment. The third theme considered organisational and personal enabling strategies to assist implementers in preparing for their role. The findings to a large extent support the literature review.
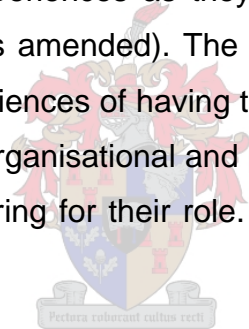
The following chapter (Chapter 7) documents the limitations of the present study, recommendations for future research and a final conclusion.

CHAPTER 7: RECOMMENDATIONS AND CONCLUSION

7.1. Limitations

The final section in this study aims to provide guidance for future researchers interested in studying the experiences of retrenchment implementers.

It does not necessarily follow that the findings are accurate reflections of the entire reality of the implementer. The preceding statement is made against the backdrop that the qualitative research approach followed in the study suffers all of the limitations inherent in relying on data collected during relatively short once-off interviews (albeit varying in length of between 45 minutes to two hours). The picture that therefore emerges is a snapshot across varying time periods of exposure to the implementer role. In the study, time periods ranged from as far back as five years ago to the last six months. This may have diluted the implementer experiences as is natural over the course of time. However, the elaborated responses from implementers provide some description of the "how" and "why" features of the phenomenon under investigation and thus provide a richer, contextualised snapshot as a part of a baseline investigation.

Evidently, multiple independent data coders potentially contribute significantly to the reliability and validity of this qualitative analysis process. For exploratory studies where qualitative data are used in exploration of a phenomenon for example, it is arguably less important to invest in such validation than for studies where quantitative data are used in theory testing. It is the intention of the present study to inform future research which may be conducted in more controlled settings. While the aforementioned issues are commonly raised in the context of qualitative research, it is limitations that are considered part and parcel of qualitative research and the use of moderately limited validation processes needs to therefore be evaluated in the context thereof.

There are also design limitations, in that the study is heavily dependent on the verbal reports of the participants. This is largely a function of a research

question that was not likely to be answered by documented processes. Attempts at triangulation within this study are, at best, "within-method" (Snow & Thomas, 1994). That is, the sources of evidence to support emergent themes were derived from multiple cases, multiple participants within some cases, and also convergence of scaled and elaborated responses collected from individual participants. These multiple sources are likely to share common flaws, which could be avoided by the use of triangulation with alternative methods applied to similar research questions (Snow & Thomas, 1994). This was not however feasible within the scope of the present study.

The majority of the qualitative data that relate to the emergent themes have been reported and to allow for further at length perusal, the participants' raw data are presented in electronic format attached as a CD in Appendix C.

The sample in the present study requires consideration in view of the findings obtained. As has been indicated, the participants are from different organisations and industries, experiencing different organisational approaches to the handling of retrenchment and while they all had the role of implementer to fulfil, the circumstances under which their role implementation occurred, naturally differed. The researcher is cognisant that such differences may have shaped the experiences of implementers in different ways, but nonetheless the findings obtained, offers a holistic account of the implementers experiences and as already indicated in the introduction of the preceding chapter (Chapter 6), the findings suggest that their experiences connect them in a shared narrative, in which strong emotions provide them with lucid and similar chronicles.

7.2. Recommendations for Future Research

It is recommended that future research about retrenchment should address the issue of multiple research sites with obviously different approaches to retrenchment implementation by gathering data from within singular research sites. If, for example, the phenomenon to be observed has to be contained within a single or relatively small number of cases, then future researchers

could choose cases where the experiences of the retrenchment implementer is transparently observable.

To support evidence of emergent themes in the present study, it is recommended that future research apply a triangulated methodology to gather different types of data, which can be used as cross checks. The aim of the triangulated approach is to draw on the specific and diverse strengths of various methods of data collection like interviews, archived documents and direct observation. With triangulation, the researcher has the privilege and benefit of listening to all sides of a particular "drama". With that privilege comes the scientific and ethical responsibility to present all significant views before offering the research's perspective. The balance between and application of the three mentioned methods of data collection will vary between research projects and also be determined by available resources like funding, time and number of researchers involved in the research project.

The data for the present study was collected after the implementer experience of having to implement the retrenchment. In doing future research, the researcher could collect the data in a different way by interviewing implementers about their experiences before, during and after the retrenchment implementation. This would allow the researcher to gather more comprehensive data over a longer period of time, which could enhance the quality of the research.

Given South Africa's unique history and development of modern labour law mechanisms since the country's democratisation in 1994, future research scholars might fruitfully explore another retrenchment stakeholder, namely the retrenchment decisionmaker, with particular investigation into management's understanding of and hence application of the legal provisions of s189 and s189A of the Labour Relations Act, 66 of 1995 (as amended) pertaining to dismissals for operational requirements. This would add to the existing research on the various stakeholders affected by retrenchment and also provide researchers and organisations with further insight into the successful implementation of retrenchments.

Future research might also quantitively explore whether organisational factors significantly shape the implementers' experience.   Stated differently: Do organisational factors that is, emotional support, pre-retrenchment training and the provision of professional psychological counselling as part of an implementer support plan significantly impact the experiences of the retrenchment implementers? Examining organisational efforts at assisting and preparing implementers for their role may reduce implementer's performance anxiety to tolerable levels of intensity and is an area therefore suitable for future research.

While the literature does not implicitly state the impact of varying timelines for counselling sought, future research on the role and timing of professional psychological counselling in shaping and re-framing the experiences of the implementer is another area for investigation.

From the present study it is clear that the majority of implementers experienced negative emotional reactions to their role as implementers. Since implementers tend to rely on emotion-focused strategies to enable them to cope with delivering the retrenchment message, future research could provide insight into how emotional intelligence could be used as a framework to explore the different ways in which specific individual differences affect an implementer's subjective experience of having to emotionally cope with the implementer experience and to control the strong emotions associated with the implementer role. Stated differently: Does emotional intelligence have an effect on the recognition and management of the negative emotions associated with the implementer role? Future research could potentially illuminate how individual differences in emotional intelligence shape implementers' experiences and behaviours.

It is proposed that by acknowledging and addressing the stated research limitations and recommendations, employers and researchers will be in a better position to facilitate the development of comprehensive and systematic long-term retrenchment strategies or plans, which are inclusive of guidelines for assistance and support for implementers, particularly if they are

instrumental in ensuring the success of retrenchment initiatives. It is also the researcher's informed opinion that the success of such an overall retrenchment plan will be mitigated by the experience of fair treatment by all stakeholders in terms of procedural, distributive, informational and interactional justice issues.

7.3. Conclusion

In this study retrenchment was discussed to provide a general orientation for understanding the experiences of retrenchment implementers. The literature review provided an overview of the experiences of retrenchment implementers. As part of this overview it was pointed out that they are subjected to both procedural and personal experiences as well as enabling strategies.
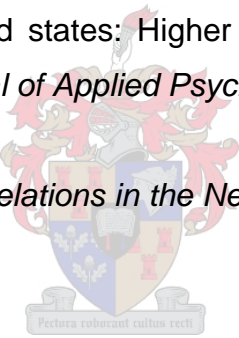
The results of the content analysis of the interview data clearly supports that the experiences of South African implementers are comparable to the experiences of participants in international research and therefore provide rich, reflective material for the implementers of retrenchment with regards to raising their awareness to the experience of having to implement the retrenchment decision as well as the means by which they choose to cope with their task.

The findings of this study also benefit retrenchment decisionmakers (senior management) in that it offered a window on the life-world of the implementers, thereby assisting them in understanding some of the challenges implementers face in implementing the retrenchment and therefore offer guidance in the role that employers can play in preparing the implementers to deal with the emotional impact of retrenching others.

Finally the findings of this study can be used to develop guidelines for assisting implementers in their personal preparation for their role.

REFERENCES

Appelbaum, S.H., Close, T.G., & Klasa, S. (1999). Downsizing: an examination of some successes and more failures. *Management Decision 37*(5), 424-436.

Appelbaum. S.H., & Donia, M. (2000). The realistic downsizing preview: a management intervention in the prevention of survivor syndrome (Part I). *Career Development International, 5*, 333-350.

Appelbaum. S.H., & Donia, M. (2001). The realistic downsizing preview: a management intervention in the prevention of survivor syndrome (Part II). *Career Development International, 6*, 128-148.

Appelbaum. S.H., Leblanc, M., & Shapiro. B.T., (1998). The aftermath of downsizing: A case study of disengagement, disidentification, disenfranchisement and disenchantment. [Electronic version]. *Journal of Management Development, 17*, 402-431.

Appelbaum, S.H., Simpson, R., & Shapiro, B.T. (1987). The tough test of downsizing. *Organizational Dynamics, 16*(2), 68-79.

Armstrong-Stassen, M. (1994). Coping with transition: a study of layoff survivors. [Electronic version]. *Journal of Organizational Behaviour, 15*, 597-621.

Arthur, M.B. (1994). The boundaryless career: A new perspective for organizational inquiry. [Electronic version]. Journal of Organizational Behaviour, *15,* 295-306.

Arthur, M.B., Hall, D.T., & Lawrence, B.S. (1989). *Handbook of Career Theory.* Cambridge: Cambridge University Press.

Barling, J. (1990). *Employment, Stress and Family Functioning.* New York: Wiley.

Baruch, Y., & Hind, P. (2000). Downsizing and survivor syndrome. *Journal of Managerial Psychology, 15*, 29-45.

Bazerman, M., Tenbrunsel, A., & Wade-Benzoni, K. (1998). Negotiating with yourself and losing: Making decisions with competing internal preferences. [Electronic version]. *Academy of Management Review, 23*, 225-241.

Beaumont, M.S. (1991). *Guide to Unfair Labour Practices.* Johannesburg: Industrial Relations Division, FSA (Pty) Ltd.

Beehr, T. (1995). *Psychological Stress in the Workplace.* New York, NY: Routledge.

Beehr, T., Welsh, J., & Taber, T. (1976). Relationship of stress to individually and organizationally valued states: Higher order needs as a moderator. [Electronic version]. *Journal of Applied Psychology, 61,* 35-40.

Bendix, S. (2003). *Industrial Relations in the New South Africa.* (4th ed.). Cape Town: Juta & Co.

Berg, B.L. (1998). *Qualitative Research for Social Sciences.* London: Allyn & Bacon.

Bies, R.J., & Shapiro, D.L. (1988). Voice and justification: Their influence on procedural fairness judgements. *Academy of Management Journal, 31,* 676-685.

Borgman, C.L. (1986). The user's mental model of an information retrieval system: an experiment on a prototype online catalogue, [Electronic version]. *International Journal of Man-Machine Studies 24,* 47–64.

Boyatzis, R.E. (1998). *Transforming Qualitative Information: Thematic Analysis and Code Development.* Thousand Oaks, CA: Sage Publications.

Brenner, M., Brown, J., & Canter, D. (1985). *The Research Interview: Uses and Approaches.* Orlando: Academic Press.

Brockner, J. (1992). Managing the effects of layoffs on survivors. [Electronic version]. *California Management Review, 34*(2), 9-28.

Brockner, J. (1994). Perceived fairness and survivor's reactions to layoffs, or how downsizing organisations can do well, by doing good. [Electronic version]. *Social Justice Research,* 345-364.

Brockner, J., Davy, J., & Carter, C., (1985). Layoffs, self-esteem, and survivor guilt: Motivational, affective, and attitudinal consequences. [Electronic version]. *Organisational Behaviour and Human Decision Processes, 36,* 229-244.

Brockner, J., DeWitt, R., Grover, S., & Reed, T. (1990). When it is especially important to explain why: Factors affecting the relationship between manager's explanations of a layoff and survivor's reaction to the layoff. [Electronic version]. *Journal of Experimental and Social Psychology, 26,* 389-407.

Brockner, J., & Greenberg, J. (1990). The impact of layoffs on survivors: An organizational justice perspective. In J.S. Carrol (Ed). *Applied Social Psychology and Organizational Settings.* (pp. 45-75). New Jersey: Hillsdale.

Brockner, J. Greenberg, J., Brockner, A., Bortz, J., Davy, J., & Carter, C. (1986). Layoffs, equity theory and work performance: Further evidence on the impact of survivor guilt. [Electronic version]. *Academy of Management Journal, 29,* 373–384.

Brockner, J., Grover, S., Reed, T., & Dewitt, R. (1992). Layoffs, job insecurity, and survivors' work effort: Evidence of an inverted-U relationship. [Electronic version]. *Academy of Management Journal, 35*, 413-425.

Brockner, J., Grover, S., Reed, T., Dewitt, R., & O'Malley, M. (1987, December). Survivors' reactions to layoffs: we get by with a little help for our friends. [Electronic version]. *Administrative Science Quarterly, 32*, 526-41.

Brockner, J., Konovsky, M., Cooper-Schneider, R., Folger, R., Martin, C., & Bies, R. (1994). Interactive effects of procedural justice and outcome negativity on victims and survivors of job loss. [Electronic version]. *Academy of Management Journal, 37,* 397-409.

Brockner, J., Tyler, T.R., & Cooper-Schneider, R. (1992). The influence of prior commitment to an institution on reaction to perceived unfairness: The higher they are the harder they fall. [Electronic version]. *Administrative Science Quarterly, 37*, 241-261.

Brockner, J., & Wiesenfeld, B. M. (1996). An integrative framework for explaining reactions to decisions: Interactive effects of outcomes. [Electronic version]. *Psychological Bulletin, 120*(2), 189-202.

Brousseau, K.R., Driver, M.J., Eneroth, K., & Larsson, R. (1996). Career pandemonium: realigning organizations and individuals. *Academy of Management Executive, 10*(2), 38-45.

Bruton, G., Keels, J., & Shook, C. (1996). Downsizing the firm: answering the strategic questions. *Academy of Management Executive, 10(2)*, 37-45.

Buch, K., & Aldridge, J. (1991). O.D. under conditions of organizational decline. *Organization Development Journal, 9*, 1-5.

Cameron, K.S. (1994a). Investigating organisational downsizing: fundamental issues. [Electronic version]. *Human Resource Management, 33*, 183-188.

Cameron, K.S. (1994b). Strategies for Successful Organizational Downsizing. [Electronic version]. *Human Resource Management, 33*(2), 189-211.

Cameron, K.S., Freeman, S.J., & Mishra, A.K. (1991). Best practices in white-collar downsizing: managing contradictions. [Electronic version]. *Academy of Management Executive, 5*(3), 57-73.

Cameron, K.S., Freeman, S.J., & Mishra, A.K. (1993). Organisational downsizing. In G.P. Huber, & W.H. Glick (Eds.), *Organisational Change and Redesign: Ideas and Insights for Improving Performance* (pp.19-65). New York: Oxford University Press.

Cameron, K.S., Sutton, R.I., & Whetton, D.A. (1987). *Readings in Organizational Decline: Frameworks, Research and Prescriptions.* Cambridge, MA: Ballinger.

Cascio, W.F. (1993). Downsizing: what do we know? What have we learnt? [Electronic version]. *Academy of Management Executive, 7,* 95-104.

Caudron, S. (1996). Teach downsizing survivors how to thrive. [Electronic version]. *Personnel Journal,* 38-48.

Chitwood, R.E. (1997). Why change is not working in most companies. [Electronic version]. *National Underwriter, 101*(*5*), 19-21.

Choudhuri, D., Glauser, A., & Peregoy, J. (2004). Guidelines for writing a qualitative manuscript for the Journal of Counselling and Development. *Journal of Counselling and Development, 82,* 443-446.

Christakis, N. A. (1999). *Death foretold: Prophecy and Prognosis in Medical Care.* Chicago: University of Chicago Press.

Clair, J.A., & Dufresne, R.L. (2004). Playing the grim reaper: How employees experience carrying out a downsizing. [Electronic version]. *Human Relations, 57,*1597-1625.

Cohen, S., & Wills, T.A. (1985). Stress social support and the buffering hypothesis. *Psychological Bulletin, 98*, 302-317.

Cooper, C. (1994, October 16). Presentees: new slaves of the office who run on fear, *Sunday Times,* p. 23.

Craven, P. (2003). Joint media statement by COSATU, SACTWU and CEPPAWAWU on Job Losses in the Plastic Bag, Clothing, Textile and Leather Industries. Retrieved August, 30, 2006, from http://nedlac.org.za

Denzin, N.K., & Lincoln, Y. (1994). *Handbook of Qualitative Research.* Thousand Oaks, California: Sage.

Dermer, J. (1988). Control and organisational order. [Electronic version] *Accounting, Organizations & Society. 13*(1), 25-36.

Doherty, N. (1998). The role of outplacement in redundancy management. *Personnel Review Volume 27*(4), 343-353.

Doherty, N., & Horsted, J. (1995). Helping survivors to stay on board. [Electronic version]. *People Management, 1*(1), 26-29.

Dolan, S., Belout, A., & Balkin, D.B., (2000). Downsizing without downgrading: learning how firms manage their survivors. *International Journal of Manpower, 21*, 34-47.

Donovan, M.A., Drasgrow, F., & Munson, L.J. (1998). The perceptions of fair interpersonal treatment scale: Development and validation of interpersonal treatment in the workplace. *Journal of Applied Psychology, 83,* 683-692.

Dougherty, D., & Bowman, E.H. (1995). The Effects of Organizational Downsizing on Product Innovation. *California Management Review, 37*(4), 28-44.

DuBose, C. (1994). Breaking the bad news – informing people that they are fired. [Electronic version]. Retrieved August, 23, 2006, from http://www.findarticles.com

Dupuis, L., Boucher, S., & Clavel, L. (1996). Downsizing. Its effects on survivors. [Electronic version]. Retrieved June, 17, 2006, from http://www.psccfp.gc.ca

Evans, M., Gunz, H., & Jalland, M. (1996, May-June). The aftermath of downsizing: a cautionary tale about re-structuring and careers. [Electronic version], *Business Horizons,* pp. 1-5.

Farber, N.K. (2006). Conducting qualitative research: a practical guide for school counsellors. [Electronic version]. *Professional School Counselling*, *9*(5), 367-375.

Feldman, D.C., & Leana, C.R. (1994). Better Practices in Managing Layoffs, *Human Resource Management, 33*(2), 239-260.

Flick, U. (2002). *An Introduction to Qualitative Research.* London: Sage Publications.

Folger, R., & Skarlicki, D. P. (1998). When tough times make tough bosses: Managerial distancing as a function of layoff blame. *Academy of Management Journal, 41*, 79-87.

Folger, R., & Skarlicki, D. P. (2001). Fairness as a dependent variable: Why tough times can lead to bad management. In R. S. Cropanzano (Ed.), *Justice in the Workplace: From Theory to Practice,* (2nd ed.) (pp. 97-118). Mahwah, NJ: Lawrence Erlbaum Associates.

Fowke, K. G. (1998). Layoffs and survivors' career motivation. [Electronic version]. Unpublished manuscript, School of Industrial Relations, Queen's University, Kingston, Ontario, Canada.

Fried, Y., Tiegs, R.B., Naughton, T.J., & Ashforth, B.E. (1996). Managers' reactions to a corporate acquisition: A test of an integrative model. *Journal of Organizational Behavior 17*, 401-427.

Frost, P., Dutton, J., Worline, M., & Wilson, A. (2000). Narratives of compassion in organisations. In S. Finneman (Ed.), *Emotion in Organisations* (pp. 25-45). Thousand Oaks. CA: Sage.

Gilbert, D. T., Driver-Linn, E., & Wilson, T. D. (2002). The trouble with Vronsky: Impact bias in the forecasting of future affective states. In L. F. Barrett & P. Salovey (Eds.), *The Wisdom in Feeling: Psychological Processes in Emotional Intelligence* (pp.114-143). New York: Guilford Press.

Glosscoe, D.D. (2005). Employment contracts. [Electronic Version] *RDH Magazine*, *25*(1), 18-73.

Gottlieb, M.R., & Conkling, L. (1995). *Managing the Workplace Survivors: Organizational Downsizing and the Commitment Gap*. Westport, CT: Quorum Books.

Greenberg, J. (1987). A taxonomy of organizational justice theories. [Electronic version]. *Academy of Management Review, 12*(1), 9-22.

Greenberg, J. (1990). Organizational justice: yesterday, today and tomorrow. [Electronic version]. *Journal of Management, 16*(2), 399-432.

Greenhalgh, L. (1982). Managing the job insecurity crisis. [Electronic version]. *Human Resource Management, 22*, 431-444.

Grunberg, L, Moore, S., & Greenberg, E. (2004). Managerial reactions to implementing layoffs: the effects on well-being and withdrawal behaviours. [Electronic version]. Institute of Behavioural Science, Research Program

on Political and Economic Change, University of Colorado at Boulder, Working Paper PEC2004-0005.

Hall, D.T. (1996). Protean careers of the 21st century. [Electronic version]. *Academy of Management Executive 10*(4), 8–15.

Hallier, J., & Lyon, P. (1996). Job insecurity and employees' commitment: managers' reactions to the threat and outcomes of redundancy selection. [Electronic version]. *British Journal of Management, 7*, 107-23.

Hancock, L.N. (1995). Breaking point. [Electronic version]. *Newsweek, 125*(10) pp.56-61.

Henkoff, R., (1990). Cost Cutting: How To Do It Right. [Electronic version]. *Fortune, 121*(8), 26-33.

Hlekiso, T. (2004, June) Employment gains and losses by sector and sub sector between 1980 and 2001. *Labour Market Frontiers, The South African Reserve Bank, 5*, 1-5.
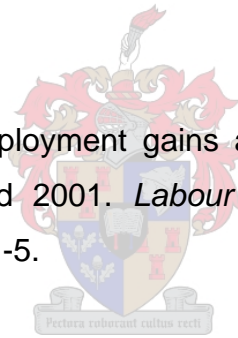
Hodgetts, R.M. (1996). A conversation with Warren Bennis on leadership in the midst of downsizing. [Electronic version]. *Organizational Dynamics, 25*(1), 72-78.

Holliday, A. (2002). *Doing and Writing Qualitative Research.* London: Sage Publications.

Holmstrand, D., & Stens, C., (2001). Survivors, the critical factor in layoffs. [Electronic version]. Unpublished Bachelor Thesis, Uppsala University, Sweden.

Hooper-Box, C. (2002, May 5). South African economy shedding jobs at alarming rate – Stats SA. [Electronic version]. *Weekend Argus,* p.4.

Hopkins, W. E., & Hopkins, S.A., (1999). The ethics of downsizing: perceptions of rights and responsibilities. [Electronic version]. *Journal of Business Ethics, 18,* 145-156.

Hupfeld, S.F. (1997). Restructuring and organization: management's role in defining organizational culture*.* [Electronic version]. *Frontiers of Health Services Management, 13*(4), 40-43.

I-Net Bridge. (2005, September 8). Lonmin mum on retrenchments. *Business Report.* [Electronic version]. Retrieved October, 22, 2006, from http://busrep.co.za

Isabella, L.A. (1989). Downsizing: survivors' assessment. [Electronic version]. *Business Horizons 32*(3), 35-41.

Israelstam, I. (2002, September 18). Outlawing retrenchments done the old way. The Star Newspaper. Retrieved October, 22, 2006 from http://iol.co.za

Izard, C.E., (1991). *The Psychology of Emotions.* New York, NY: Plenum Press.

Jeffrey, J. (2001). The day I killed my dot-com. Retrieved August 23, 2006 from http://www.salon.com

Kaye, B.L. (1998). The surviving core. [Electronic version]. *Training and Development, 52*, 1-8.

Kets de Vries, M.F.R., & Balazs, K. (1997). The downside of downsizing. [Electronic version]. *Human Relations, 50*(1), 1-50.

Kinnie, A., Hutchinson, S., & Purcell, J. (1998) Downsizing: Is it always lean and mean? [Electronic version]. *Personnel Review*, 27, 296-311.

Klinger, D. (2003). Silver Linings. [Electronic version]. *Business Officer Magazine*, pp. 31-34. Retrieved August, 23, 2006, from http://www.nabuco.org

Konovsky, M., & Folger, R. (1991). The effects of procedures, social accounts and benefits level on victims' layoff reactions. [Electronic version]. *Journal of Applied Social Psychology 21*(8), 630-650.

Kopelman, R.E., Greenhaus, J.H., & Connolly, T.F. (1983). A model of work, family and interrole conflict: A construct validation study. [Electronic version]. *Organisational Behaviour and Human Performance, 32*, 198-215.

Kozlowski, S. W. J., Chao, G. T., Smith, E. M., & Hedlund, J. (1993). Organisational downsizing: Strategies, interventions, and research interventions. In C.L. Cooper & I. T. Robertson, (Eds.), *International Review of Industrial and Organisational Psychology* (pp. 263-332). New York: Wiley.

Kruger, D. (1998). *An Introduction to Phenomenological Psychology* (2nd ed.). Johannesburg: Juta.
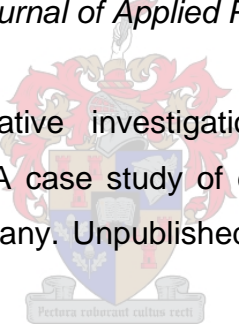
Kvale, S. (1996). *Interviews: An Introduction to Qualitative Research Interviewing.* Thousand Oaks, CA: Sage Publications.

Labib, N., & Appelbaum, S.H., (1993). Strategic downsizing: a human resources perspective. [Electronic version]. *Human Resource Planning 16*(4), 69-93.

Labour Protect. Retrieved August, 31, 2006, from http://www.labourprotect.co.za

LaÈmsa, A.M. (1999). Organizational downsizing: An ethical versus managerial viewpoint. [Electronic version]. *Leadership & Organization Development Journal 20*(7), 345-353.

Larkin, T.J., & Larkin, S. (1996, May-June). Reaching and changing frontline employees. [Electronic version]. *Harvard Business Review,* 95-104.

Lazarus, R.S., & Folkman, S. (1984*). Stress, Appraisal, and Coping.* New York, NY: Springer Publishing Company.

Leana, C.R., & Feldman, D.C. (1988). Individual responses to job loss: perceptions, reactions, and coping behaviours. [Electronic version]. *Journal of Management 14*(3), 375-389.

Leatt, P., Baker, G.R., Halverson, P., & Aird, C. (1997). Downsizing, reengineering, and restructuring: long-term implications for healthcare organizations. [Electronic version]. *Frontiers of Health Services Management, 13*(4), 3-37.

Leedy, P.D. (1997). *Practical Research: Planning and Design with contributions by Timothy J. Newby and Peggy A. Ertmer.* Upper Saddle River, New Jersey: Merrill.

Leung, A.S.M., & Chang, L.M.K. (2002). Organisational downsizing: psychological impact on surviving managers in Hong Kong. [Electronic version]. *Asia Pacific Business Review, 8,* 76-94.

Lillis, A. M., (1999). A framework for the analysis of interview data from multiple field research sites. [Electronic version]. *Accounting & Finance, Vol. 39*(1), 79-105.

Makawatsakul, N., & Kleiner, B.H. (2003). The effect of downsizing on morale and attrition. [Electronic version]. *Management Research News*, 26(2/3/4), 52-62.

Marks, M.L., & DeMeuse, K.P. (2002). *Resizing the Organization: Managing Layoffs, Divestitures, and Closings.* New York: Wiley, John & Sons, Inc.

Marshal, C., & Rossman, G.B. (1999). *Designing Qualitative Research.* Thousand Oaks, C.A.: Sage Publications.

Maykut, P., & Morehouse, R. (1994). *Beginning Qualitative Research: A Philosophic and Practical Guide.* London: Falmer Press.

McCracken, G. (1988). *The Long Interview.* Sage: Newbury Park

Merriam, S.B. (1998). *Qualitative Research and Case Study Applications in Education.* San Francisco: Jossey-Bass.

Middleton, D. (1989) Emotional style: the cultural ordering of emotions. [Electronic version]. *Ethos, 17,* 187–201.

Mikula, G., Petrik, B., & Tanzer, N. (1990). What people regard as unjust: types and structures of everyday experiences of injustice. [Electronic version]. *European Journal of Social Psychology, 20*(2), 133-149.

Miles, M.B., & Huberman, A.M., (1994). *Qualitative Data Analysis. An Expanded Sourcebook.* (2nd ed.). Newbury Park, CA: Sage Publications.

Mishra, A.K., & Mishra, K.E., (1994). The role of mutual trust in effective downsizing strategies. [Electronic version]. *Human Resources Management, 33*(2), 261-279.

Mishra, A.K., Spreitzer, G.M., & Mishra, K.E. (1998). Preserving Employee Morale During Downsizing. *Sloan Management Review, 39*(2), 83–95.

Modise, S. (2002). The impact of retrenchment on employees and measures to alleviate it. [Electronic version]. Retrieved September, 1, 2006, from http://www.ccma.org.za

Molinsky, A., & Margolis, J. (2005). Necessary evils and interpersonal sensitivity in organisations. [Electronic version]. *Academy of Management Review,* 30(2), 245-268.

Molinsky, A., & Margolis, J. (2006). The emotional tightrope of downsizing: hidden challenges for leaders and their organisations. [Electronic version]. *Organizational Dynamics, 35*(2), 145-159.

Moorman, R.H. (1991). Relationship between organization justice and organizational citizenship behaviours: do fairness perceptions influence employee citizenship? *Journal of Applied Psychology, 76*(6), 845-855.

Morar, V. (2004). A qualitative investigation into the experiences of retrenchment survivors: A case study of employees at a South African alcoholic beverage company. Unpublished masters thesis, University of Cape Town.

Morris, J.A., & Feldman, D. (1996). The dimensions, antecedents, and consequences of emotional labour. [Electronic version]. *Academy of Management Review, 21,* 986-1010.

Mouton, J. (1996). *Understanding Social Research.* Pretoria: Van Schaik Academic.

Mouton, J. (2001). *How to Succeed in your Master's and Doctoral studies: a South African Guide and Resource Book.* Pretoria: Van Schaik.

Naumann, S.E., Bies, R.J., & Martin, C.L. (1995). The roles of organizational support and justice during a layoff. [Electronic version]. *Academy of Management Best Papers Proceedings, 55,* 89-93.

Nelson, D.L., & Burke, R.J. (1998). Lessons learned. [Electronic version]. *Revue Canadienne des Sciences de l'Adminstration, 15*(4), 372-381.

Neuman, W.L. (1997), Social Research Methods: Qualitative and Quantitive Approaches. Boston: Allyn & Bacon.

Newell, H., & Dopson, S. (1996). Muddle in the middle: organizational restructuring and middle management careers. [Electronic version]. *Personnel Review, 25*(4), 4-20.

Noer, D.M. (1993). *Healing the Wounds: Overcoming the Trauma of Layoffs and Revitalising Downsized Organisations.* San Francisco: Jossey Bass Publishers.

Noronha, E., & D'Cruz, P. (2005). Achieving downsizing: managerial perspectives. [Electronic version]. *Global Business Review, 6*(1), 79-94.

Noronha, E., & D'Cruz, P. (2006). A Necessary Evil: the experiences of managers implementing downsizing programmes. [Electronic version]. *The Qualitative Review, 11*(91), 88-112.

Odendahl, M. (2001). Breaking the bad news. [Electronic version]. Retrieved August 23, 2006, from http://www.bizjournals.com

O'Neill, H.M., & Lenn, J. (1995). Voices of survivors: Words that downsizing CEO's should hear. [Electronic version]. *Academy of Management Executive, 9*, 23–34.

Osborne-Kilpatrick, A. (1999). When in Doubt, Don't: Alternatives to Downsizing. [Electronic version]. *Management, Vol.* 2(3), 209-219.

Patton, M.Q. (1990). *Qualitative Evaluation and Research Methods,* (2nd ed.). Newbury Park: Sage.

Peak, M.H. (1996). An era of wrenching corporate change. [Electronic version]. *Management Review, 85*(*7*), 45-49.

Polkinghorne, D.E. (1989). Phenomenological research methods. In R.S. Valle & S. Halling (Eds.), *Existential Phenomenological Perspective in Psychology: Exploring the Depths of Human Experience* (pp. 41-60). New York: Plenum Press.

Punch, K.F. (1998). *Introduction to Social Research: Quantitive and Qualitative Approaches.* London: Sage.

Purcell, J. (1993). The challenge of human resource management for industrial relations research and practice. [Electronic version]. *International Journal of Human Resource Management, 4*(3), 511-527.

Quinn Mills, D. (1996, Summer). The decline and rise of IBM. [Electronic version]. *Sloan Management Review*, pp. 78-82.

Repitti, R (1989). Effects of daily workload on subsequent behaviour during marital interactions. The role of social withdrawal and spouse support. [Electronic version]. *Journal of Personality and Social Psychology, 57,* 651-659.

Roskam, A. (2002). Under the guise of retrenchments. [Electronic version]. *SA Labour Bulletin*, *26*(1), 66-68.

Roskies, E., & Guering, C. (1990). Job insecurity in managers: antecedents and consequences. *Journal of Organisational Behaviour, 11*, 345-359.

Rousseau, D. (1990). New hire perceptions of their own and their employees' obligations: A study of psychological contracts. *Journal of Organisational Behaviour, 11,* 389-400.

Sadri, G. (1996). Reflections: The impact of downsizing on survivors – some findings and recommendations. *Journal of Managerial Psychology, 11*(4), 56-59.

Sandler, S. F. (2003). Revamping the "employment contract". [Electronic version]. *HR Focus, 80*(12), 1-15.

Saunders, M, Lewis, P., & Thornhill, A. (2003). *Research Methods for Business Students.* London: Prentice Hall.

Shapiro, D.L. (1991). The effects of explanations on negative reactions to deceit. *Administrative Science Quarterly 36*(4), 614-630.

Schaubroeck, J, May, D.R., & Brown, W.R. (1994). Procedural justice explanations and employee reactions to economic hardship: a field experiment. [Electronic version]. *Journal of Applied Psychology, 79*(3), 455-460.

Shaw, J.B., & Barrett-Power, E. (1997). A conceptual framework for assessing organization, work groups and individual effectiveness during and after downsizing. [Electronic version]. *Human Relations, 50*(2), 109-127.

Schein, E.H. (1971). The individual, the organization and the career: A conceptual scheme. *Journal of Applied Behavioural Science, 7*, 401-26.

Schein, E.H. (1996). Career anchors revisited: Implications for career development in the 21st century. *Academy of Management Review 10*(4), 80–8.

Shenton, A.E., (2004). Strategies for ensuring trustworthiness in qualitative research projects. [Electronic version]. *Education for Information 22*, 63–75.

Schroeder, F. (undated). How to fire people in Asia. Business Management Asia, 99-101. [Electronic version]. Retrieved August, 31, 2006, from http://businessmanagementasia.com

Sloan, A. (1996, February 26). The hitmen. [Electronic version]. *Newsweek*, *127*(9), pp. 44-48.

Smith, L. (1994). Burned out bosses. [Electronic version]. *Fortune*, *130(*2), pp. 44-48.

Snow, C.C., & Thomas, J.B. (1994). Field research methods in strategic management: Contributions to theory building and testing. [Electronic version]. *Journal of Management Studies 31*, 457-480.

Sokolowski, R. E. (2000). Introduction to Phenomenology. Cambridge: Cambridge University Press.

South African Press Association (Sapa). (2005, September, 2) De Beers consider retrenchments, *Mail & Guardian.* [Electronic version]. Retrieved October, 22, 2006 from http://mg.co.za

Staw, B.M., Sandelands, L.E., & Dutton, J.E. (1992). Threat-rigidity effects in organizational behaviour: A multi-level analysis. [Electronic version]. *Administrative Science Quarterly, 26,* 501-524.

Stein, E.V. (1969). *Guilt: Theory and Therapy*. London, UK: Allen & Unwin.

Stein, H.F. (1996). Death imagery and the experience of organizational downsizing: Or is your name on Schindler's List? Retrieved June, 1, 2006 from http://www.sba.oakland.edu/ispso.html/stein.html

Stewart, W., & Barling, J. (1996). Father's work experiences affect children's behaviours via job-related affect and parenting behaviours. [Electronic version]. *Journal of Organisational Behaviour, 17*, 212-232.

Terre Blanche, M., & Durrheim, K. (1999). *Research in Practice: Applied Methods for the Social Sciences.* Cape Town: University of Cape Town Press.

Terre Blanche, M., & Kelly, K. (1999). Interpretive methods. In M. Terre Blanche & K. Durrheim (Eds.), *Research in Practice: Applied Methods for the Social Sciences* (pp. 123-145). Cape Town: University of Cape Town Press.

Thompson, C., & Benjamin, P. (2006). *South African Labour Law*. Cape Town: Juta & Co Ltd.

Thornhill, A. & Saunders, M.N.K. (1998). The meanings, consequences and implications of the management of downsizing and redundancy: a review. *Personnel Review*, 27, 271-295.

Tomasko, R.M. (1992). Restructuring: getting it right. *Management Review, 81,* 10-15.

Tombaugh, J.R., & White, L.P. (1990). Downsizing: An empirical assessment of survivors' perceptions in a post layoff environment. *Organization Development Journal, 8*, 32–43.

Tuttery, L.M., Rotnery, M.A., & Grinnell, R.M. Jr. (1996*). Qualitative Research for Social Makers.* London: Allyn & Bacon.

Van Maanen J. (1983). The fact and fiction in organizational ethnography. In J. Van Maanen, (Ed.), *Qualitative Methodology* (pp. 37–55). Beverly Hills: Sage.

Vishnewsky, T., & Beanlands, H. (2004). Interpreting Research In Nephrology Nursing: Qualitative Research. [Electronic version]. *Nephrology Nursing Journal, 31*(2), 234-238.

Vollmann, T., & Brazas, M. (1993). Downsizing. [Electronic version]. *European Management Journal, 11*(1), 18-29.

Waterman, R.H., Waterman, J.A., & Collard, B.A. (1994). Toward a Career-Resilient Workforce. *Harvard Business Review, 72,* 87-95.

Watters, M. (2004). Implementing the termination. The human factor. [Electronic version]. Retrieved August 23, 2006, from http://www.kwapartnersottowa.com/main/resources.html

Wellens, J. (1975). Levels of participation. [Electronic version]. *Industrial & Commercial Training, 7*(3), 93-96.

Wiesenfeld, B.M., Brockner, J., & Thibault, V. (2000). Procedural fairness, mangers' self esteem, and managerial behaviours following a layoff. [Electronic version]. *Organisational Behaviour and Human Decision Making Processes, 83*(1), 1-32.

Winegardner, K.E. (2001). The case study method of scholarly research. Retrieved August, 2, 2006, from http://www.tgsa.edu/online/cybrary/case1.html

Winkler, B.L. (2003). Organizational Survivors: Perceptions of Conflict and Justice during Downsizing. Unpublished Master Thesis, Texas A&M University.

Wright, B., & Barling, J. (1998). The executioners' song: listening to downsizers reflect on their experiences. *Canadian Journal of Administrative Sciences, 15*(4), 339-355.

APPENDIX A

Informed Consent

Dear Participant,

I am a Masters student in Industrial Psychology at Stellenbosch University. I am conducting research as part of the requirements of the Masters program and am very interested in understanding the experiences of the implementers of retrenchment, in other words those who have had to break the bad news to affected employees.

My request is to interview participants who have had to implement retrenchments.

Please be assured that issues pertaining to anonymity will be strictly adhered to.

Individual interviews should take place for the duration of 35 minutes to one hour as the case may be and will be tape recorded with your consent.
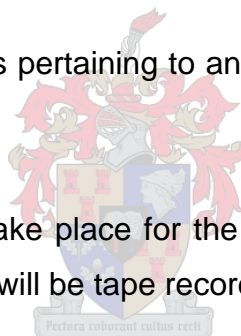
Allow me to thank you in anticipation for agreeing to participate in my study.

Kind regards,

Birgit Westermann-Winter

APPENDIX B

QUESTIONNAIRE

Biographic Information:

1. Designation
2. Number of years work experience
3. Highest educational qualifications
4. Age
5. Gender

General Questions:

1. Are you familiar with the Labour Relations Act, 66 of 1995, provisions regarding retrenchments (as amended): s189 and s189A?
2. How did you get familiar with Labour Relations Act, 66 of 1995 (as amended): s189?
3. How many times have you been involved in breaking the bad news, i.e.: where you have had to tell someone that they no longer have a job?

Retrenchment Process Experiences:

1. Can you describe the goals/objectives offered by management for the impending retrenchment/s?

2. In your view, did the retrenchment succeed in meeting the goals/objectives of the retrenchment? Can you elaborate on your view?

3. Did the company approach the possibility of retrenchment with an open mind, i.e. with no preconceived idea that they would retrench/where their minds already made up? Why do you say this?

4. Describe the process/events that took place/were followed, in the run up to the retrenchment interview/conversation?

a. How soon did management go to the employees or other consulting parties with the contemplated idea of retrenchment? Can you elaborate on your thoughts and experiences?

b. Were the stakeholders, like employees (if no union) or union representatives consulted? If so describe what happened?

c. Was the other consulting party involved in discussing alternatives?

d. What kinds of processes/ alternatives were exhausted before making the final decision to retrench? (i.e. pay freezes, job sharing, etc)

e. Did the communication increase/decrease during this time – was everyone kept informed all the time? How often did communication take place? What was the mode of communication?

f. What were the criteria to select the affected positions/employees? Where you involved in the selection of affected people/positions?

g. Was there a retrenchment/severance package offered and how was it decided on? Did the company comply with the law of one weeks pay for every year of service? Do you think this is fair? Can you motivate your answer?

h. Do you think the best benefits were offered? Can you motivate your answer?

i. Do you think others viewed the severance package as fair? Can you motivate your answer?

j. What sort of assistance was offered to the victims and survivors:
    i. Was counselling offered to the affected and unaffected employees?
    ii. Were the victim's families counselled?
    iii. Were their outplacement facilities, retraining, career guidance counselling etc provided?

k. Was there a follow-up system in place to see how the affected were doing post the retrenchments?

5. On the whole, what is your opinion on the fairness of the process and procedures followed? Can you motivate your answer with reasons or examples?

6. Do you think others viewed the entire process followed as fair? Can you motivate your answer?

7. How did the affected victims respond to the news? Can you describe critical incidents? What did you experience? How did this make you feel?

8. How do you think the news affected the remaining employees or the survivors? What were your impressions? How did this make you feel?

9. Can you describe the organisational management style? Can you motivate your answer?

10. Did you feel that the retrenchment decision makers viewed the decision to retrench as part of management's prerogative? If so, do you think that made it easier for them?

11. Did the retrenchment decision come as a surprise to everyone? Why do you think this?

12. Do you think it was a good business decision? Can you elaborate on your answer?

Personal Experiences:

1. How did you feel when you heard the news that retrenchments were going to take place? Did you have concerns about your own job? Can you explain your answer?

2. What did management expect from you?

3. When you heard/ knew that you where tasked with implementing the retrenchment, how did that make you feel? Can you explain your answer?

4. How did the organisation/ management help you prepare for your role? For example:

    a. Did you undergo any training to help you prepare for your role? If yes, can you explain what happened? How did this help you?

    b. Was there any emotional support provided for you in assisting you with this task? How did you feel about this?

    c. Did you undergo any counselling to assist you with dealing with your role in having to break the bad news? If yes, how did it help you?

5. Tell me more about your feelings during the retrenchment interview? Can you elaborate on what made it difficult or easy for you?

6. How did the conversation/interview go?

    a. What made it a good/bad interview experience?

    b. Why do you think it was a successful/unsuccessful conversation/interview?

    c. Can you provide critical incidents or examples?

    d. Can you do a role-play using your direct words?

Coping Behaviour:

1. What did you do or think to help you cope with the fact that you would have to break the bad news?

2. How did you personally prepare for the retrenchment interview/ conversation?

3. Tell me about the things you did to cope during the retrenchment conversation/ interview? Can you describe critical incidents? How did feel before, during and after the conversation?

4. As you know, part of the employment contract is the unwritten psychological contract, which relates to the traditional contract of life-long employment. Do you think that employees and employers still expect this to be true? Can you explain your answer? The new employment contract is based on the reality that the world of work is changing from a position of lifelong employment to a scenario, where

employees are now responsible for their own careers: do you think the organisation is preparing employees for this? If so, how is it being done?

5. Do you have any last thoughts on the retrenchment experience and your role in it?

APPENDIX C

INTERVIEW RAW DATA (in electronic format)
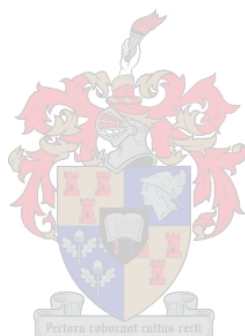
APPENDIX C

INTERVIEW COMMENTS (RAW DATA)

Central themes	Sub themes	Words / phrases (direct speech)
Familiar with the LRA, 66 of 1995 (as amended): s189?		Yes: 13 participants No: 2 participants
How did you get familiar with s189?	**Formal Studies**	Ten participants (A, C, D, E, F, G, K, M, O, Q)
	Workshops	Six participants (C, E, G, K, N, Q)
	Work experience	All fifteen participants
	Consultants	Six participants (E, F, H, L, N, Q)
	Mentors/ coaches	Five participants (D, I, J, M, K)
	Reading	Seven participants (A, C, D, E, H, J, O)
	HR department assistance	Five participants (C, I, J, K, N)
	Other	One participant (Q) works as a part-time lecturer.

Central themes	Sub themes	Words / phrases (direct speech)
Frequency in breaking the bad news		**Participant A:** *"I have been involved many times and in four different organisations as an HR Consultant, tasked with having to break the bad news"* **Participant C:** *" Twelve times in two separate companies"* **Participant D:** *"Often, especially given the nature of our business, we are a large security corporation and when you lose contracts as often the case is in our industry, you are forced to retrench large numbers of security guards on that site".* **Participant E:** *"As an HR Consultant, I have been involved in four large waves of retrenchments, at different companies and in total I would say about 140 people lost their jobs in those cases"* **Participant F:** *"In my current organisations' retrenchments, where about ten employees were affected".* **Participant G:** *"I was involved on eight different occasions, within three different organisations, resulting in hundred's of employees being retrenched"* **Participant H:** *"Four big ones, where you have got, what I would say 20 or more employees involved. I probably do three or four a year of the one-on- ones"* **Participant I:** *"One experience at my current organisation, where I had to retrench five staff members"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant J: *"My current organisation's retrenchment on two recent occasions, where 18 employees were retrenched"* **Participant K**: *"One retrenchment initiative, where the company was bought over by another organisation, resulting in everyone being affected. It took place over a two year period, a slow process of restructuring the business and we took it department by department, until we had realigned the business to the new strategy in terms of job functions required"* **Participant L**: *"I was involved in four occasions, during 1989, 1991, 1995 and 2001. I cannot remember exact figures but the one in 1989, there must have been about, 87 people retrenched. In 1991 was about 180 – 200 people and 1995 was quite substantial in terms of numbers, it was about 300 – 400 and that was as a result of a merger between two large companies, and 2001, was about 140 people. Of course there were far more involved in the consultation process, but I would say that that is what the numbers told to go, were."* **Participant M**: *"I have been involved two different organisations; with the biggest being in the automotive industry, where I led the process and approximately 350 staff members were retrenched. In my current organisation I have been involved in three waves of restructuring, where I had to personally retrench 30 staff members in one-on-one interviews. From time to time other members in the organisation's group of companies also call on me to lead the process"* **Participant N**: *"About 30"* **Participant O**: *"I was involved in one occasion, where the entire division was closed down and 80 people were affected. A colleague and fellow HR Manager assisted me, where we shared the retrenchment duties"* **Participant Q**: *"I was involved in one retrenchment initiative, where one individual was affected, but that person never lost her job, instead she started working a shorter day"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Management style and managerial prerogative**	**Participant A**: *"Autocratic bunch that avoided the consultation process. They new where they wanted to end up and pushed hard to get there. It's not only about the official reasons they offered, it's also about earning their bonuses, although I am not sure about that. They called it participative, I think it's about sitting around a boardroom table and making a cold decision. Perhaps it's easier for them because they don't see the people"* **Participant C**: *"In Company A, I experienced more consultative, with strong goal setting and direction-giving. I think because of the long process of consultation (3 months) to find alternatives to deal with the situation; I wouldn't say that management viewed it at all as their prerogative to make the final decision. In Company B, I had a very different experience. The Exco of the company walked in and directly told us managers it was their right to retrench when they wanted to, how many they wanted and how quickly they wanted to and that's that"* **Participant D**: *"It's rather paternalistic. There is no real room for negotiation and consultations. In the old days, we ran like paramilitary organisations, some sites still stand parade in the mornings so they can look neat and tidy, discipline is huge and everybody knows it and the commissioners at the CCMA know it too. Our business is security and we lose contracts so easily especially if you leave the site,*

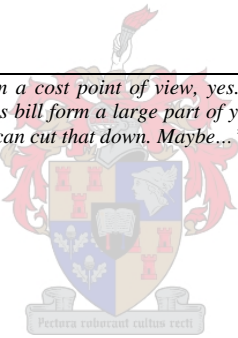| Central themes	Sub themes	Words / phrases (direct speech)
		then you're in breach of contract for example, which puts the contract in jeopardy and then clients get 'gatvol' You don't get another chance. So we make it very clear to them from the start in the induction course, that this is what you are letting yourself in for and you do stand a chance of retrenchment if your site finishes" **Participant E:** *"It varies from participative to paternalistic. In my current work contract, in their minds they have management prerogative to decide, but they will not use it until they have to. So while they say they are participative and are prepared to listen and keep an open mind, I think they are fairly sure of what the end result would be. In hindsight, all the organisations I had consulted to, the style was probably more paternalistic, i.e.: 'we knew what was the best thing to do' In my opinion it didn't make it easier to do though"* **Participant F:** *"We are a small company, only 80 people. Our board is five white males; the CEO and MD are very autocratic. Our CEO especially is very old school as part of the 'baby boomers generation', he wants long term employees for life and what he does is to remunerate well – that's his retention strategy. So you almost end up selling your soul. So you can understand what you as HR are up against, not even the three other directors can go up against these two, basically they talk the talk, tick all the boxes of corporate governance and values, but they don't walk the talk. I feel very disrespectful talking about him like this, but what the CEO wants, he gets, he is a businessman, bottom line driven. I think it's a bit of a numbers game for him as opposed to a people thing"* **Participant G:** *"Participative in terms of the consultation process. Initially at EXCO level the decision was normally taken to restructure after due consideration, but the rigour of the consultation processes followed paved the way for participative consultation into way forward, once the decision had been made to restructure."* **Participant H:** *"I think on the whole it is more directive. We did a survey a month ago and what came out was that senior managers are viewed differently, some as participative and some as directive. Our MD is very directive.* *Sure it is our duty to keep this business alive and as such we will make decisions of what is best for the business. I would not say it is our right, it is our duty and the minute we decide to do it, we say: 'ok fine, so lets talk about it'"* **Participant I:** *"I am not sure, I hadn't been working here that long. Our group MD decided. At that stage we were in a very bad stage from all aspects, culturally as well as performance and hence the whole management team was changed and the new management team that was brought in had to look at their department and put together a structure, but also with the right fit, from what we wanted our culture to be and therefore obviously people that didn't fit from both performance and a cultural values point of view were retrenched"* **Participant J:** *"The group MD is autocratic. He decided he wanted to change the business around and if we wanted to continue to be a supplier to him, we had to do it his way, so I went along with it, warning him all the way of the possible repercussions. What he wants, he gets and there is not much of a chance of negotiations with him. He told me I was overreacting. He also likes to surround himself with new and fresh ideas, young people you know and it's a known fact here, that if you have been here say more than 20 years, your ideas are seen as stale. Perhaps that is why he wouldn't listen to me.* *Within my own division, my style is more inclusive, my door is always open, even for the tea lady, you can come and talk to me anytime"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant K: *"With the new owners, it was very open and participative and they had no hidden agendas. It was exciting times for us, because we knew that with the previous managers, the style was very autocratic and status and position was important. You know all this 'high and mighty' stuff. It was their prerogative to manage the way they wanted, whereas with the new CEO and management team, it was different. It was amazing how quickly the 'old guard' were 'put in there place' and that was very exciting from an HR point of view. These people ended up resigning. Previously there was all this secret stuff and you were on a need to know basis and it wasn't always, well, I can't give you the company minutes, but lets say, proper practices weren't always used and we as HR were ignored"* **Participant L:** *"Definitely autocratic. The shareholders decided and once the big guys have decided, nothing is going to stop them"* **Participant M:** *"Whereas if we had gone into the thing and said we have done a lot of thought and you can show that you've given a lot of thought to this thing and that its for all the right reasons, that: 'here's the view and this is how its going to work, we are going to be meeting with each of you and we were going to tell you how it affects you', there's a certainty in action that is reassuring, I think.* *Because there's a whole nurturing thing that goes.... not nurturing because that's paternalistic. There's a... we are going into this together this is not about you its about what the company is about"* **Participant N:** *"Our managers then were very focused on the task at hand and the work that they had to do. We were focused for months and months, very heavily focused. The CEO had a mass meeting with all 4 shifts over a few days and shared what they were contemplating to do. They shared the company financial state; we all knew that with the strengthening rand our margins just disappeared. He shared what they were planning to do to try and minimise the impact of retrenchments, like new product development, new business, growing local business. So there were various projects underway. These last years since then, it is getting a bit lighter and we are adopting a softer, more participative style now, a less telling style and more coaching, that doesn't mean you abdicate accountability, it is difficult though"* **Participant O:** *"Everything was handled in Pretoria at headoffice level. I was just the messenger"* **Participant Q**: *"Although on the face of it participative / democratic, I believe that a couple of strong personalities steered the organisation by sheer force of will and support from others higher in the structure"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Approaching the possibility of retrenchment with an open mind**	**Participant A:** *"I think they had already made up their minds, they wanted to get rid of certain people, although the legal procedure keeps them in tow. I don't think they were objective enough. Some people have hidden agenda's with retrenchment. They use the opportunity to get rid of non-performers, older people and the lazy ones"* **Participant C:** *"In Company A they went in with an open mind, involving the employees at the beginning of the process and trying to explore alternatives as the LRA prescribes you to do, so they did that very neatly, so it was a lot easier from a management perspective. Company B, it was a case of walking in as Exco Directors; telling the company we are cutting back 50% of all staff, management, etc is going and that's it. Mind made up, no discussion, no alternatives, that's what*

Central themes	Sub themes	Words / phrases (direct speech)
		we are going to do"

Participant D: *"When we lose big contracts, we have no choice. It's the nature of our business, so the lower level security guards must go. With the senior guys, I think they should use performance management for non-performers there, but they don't use it enough"*

Participant E: *"No their minds are already made up, especially with paternalistic management, although they want to be genuine, they subconsciously, if not consciously already decided that this is the only route to go. Your role as HR, if you do your job properly, is to make them see that there are certain procedural things we have to follow. Not only for the sake of the law, but for the sake of genuinely finding alternatives, which we invariably always then did"*

Participant F: *"Can I be brutally honest? It started with a gym conversation between our CEO and MD, who took it upon them to redesign the whole structure. I was overseas at the first time we restructured and when I came back it was presented as a fait accompli. They told me they had already made their decision, without any inputs from my side on alternatives. It was a done deal as far as they were concerned"*

Participant G: *"The legislative requirements have meant that organisations, at least the one's I have been involved with, realise that this should be the last consideration. I don't think it's a decision that is taken lightly. They don't just say: 'lets go the retrenchment route to get costs down', because they know they will get challenged if that is their approach"*

Participant H: *"In theory, yes that is how it is supposed to work, but by that time we already have decided to do it obviously"*

Participant I: *"Our Group MD decided, but I think he first consulted with senior management"*

Participant J: *"Our Group MD decided he wanted to change the business around, if we wanted to continue to be a supplier to him, we had to do it his way, so I went along with it, warning him all the way of the possible repercussions."*

Participant K: *"Other options were definitely considered. They took us over as a going concern, it wasn't: 'come in and suddenly, you know we are going to retrench' There were branches that we had to close, because they shouldn't have been opened in the first place. We stopped all recruitment and tried to redeploy these branches into other vacant places."*

Participant L: *"Don't get me wrong, but management is 'puppets' of shareholders. I don't know if this is the case in other industries, but where I worked, definitely so, the shareholders 'pull the strings', by the time management speaks about it, their minds are already made up. Management might have a say in the size of reductions and who will be influenced, but with a merger, once the big guys have made up their minds, nothing is going to stop them, not even if the competitions board could stop the merger"*

Participant N: *"Their minds were not made up yet, when they shared what they were doing to try and improve the situation"*

Participant O: *"It was really a message that came from Pretoria Head Office, they had decided on it. While we were not told how to do it, we were told: 'the decision is final'."*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant Q: *"I am of the firm conviction that the minds of key players and their confidantes were already made up".*

Central themes	Sub themes	Words / phrases (direct speech)	
Procedural experiences	**Goals of the retrenchment**	**Restructuring**: Ten participants: A, C, G, F, J, K, L, M, N and Q. **Cost savings:** Six participants: A, C, G, L, N and Q. **Technology:** Two Participants: H and M **Small company: return to core business:** One Participant: A **Big company: return to core business:** Two participants: O and Q **Competition and restrategise:** Six participants: D, E, F, H, K, M **Company, division or branch closure:** Six participants: D, E, L, M, N and O **Merger and thus duplicate jobs:** Five participants: D, G, E, K and L **Improve speed and flexibility:** Two Participants: J and M **Performance and company values:** Two Participants: I and M **No clear reason given:** One Participant: C		
	Were goals achieved?	**Yes** A: *"The only company that did benefit was a small advertising agency, they had to go back to core functions and they did save money by cutting staff"*	**No** *"I don't always think so, especially when these expensive consultants were used. They promised the company that they would save them millions by cutting staff and then a few months later they recruit right back and the consultants walk away rich and the company poorer, well that's my perception of consultants."* *"The other companies ended up being 'just as fat' as they were in the beginning, because after a few months, management would come back with a motivation saying: 'oh, we need staff back', they never recruited the same people back, though because people moved on and couldn't be tracked down and they didn't want their poor-performers back in any case."*

Central themes	Sub themes	Words / phrases (direct speech)	
		C: *"Company A, definitely. Company A was a lot easier, because it was a lot more professional and structured"*	*"Company B, not all, because its very difficult to convince people of something when you- yourself are not even sure, it was very difficult and I don't think a lot of the employees bought into what you told them as a manager because people are also quite perceptive, they know what is going on in the company, they can see although they are not looking at the managements accounts every month, they know how the company is doing well financially or not. So it's very tough to say operational requirements, we are too top heavy and blah, blah, blah when the company is actually doing Ok. I suspect the CEO was just offloading and shutting down companies left right and centre based on improving the balance sheet and taking bonus's for himself"*
		D: *" Yes, I think we achieve our business goals by retrenching"*	
		E:	*"Not always. Especially where we would end up re-recruiting at least half the people back and then a year to 18 months later, we would end up retrenching again. One woman I worked with over the 15 years that I was with the company, was retrenched and re-employed three times"*
		F:	*"No, because if I look back and rethink this and our strategy, we could have redeployed these people into other areas"*
		G: *"From a cost point of view, yes. The salaries and wages bill form a large part of your expenses, so if you can cut that down. Maybe…"*	*"But at the same time, you will find that in the next year or two, they very quickly get up to the same number of people again, they may just be re-employed in a slightly different area, so you have to ask yourself, had we taken our time with this, could it have turned itself around, that's always an open question? The other thing is, people who were near retirement and often your most expensive people, probably not that productive anymore, but still very skilled people and then you losing skill, they have business's on the side, which they want to grow, they volunteer and use the package for that. Sometimes you end up buying back that skill and they come back as consultants. So I think in the longer term you lose"*
		H: *"Absolutely, yes, that one definitely. We had huge benefits from that exercise. And it was basically a part ownership, the guys had to realise that we are not this big business anymore. And the minute they did and everybody bought into that, we started making money again"*	
		I: *"We had a very clear vision for the company and would this person be able to from a performance but also from a culture values fit point of view. So yes it definitely did"*	
		J: *"Subsequent to the first wave, we had to close down 2 divisions. This time I fought very hard to keep them and we managed to outsource the one division completely, the other we managed to redeploy everyone, they kept their jobs, perks, same salaries."*	*"In retrospect in the first instance, we moved far too quickly. We subsequently re-employed three people back, which I am glad about, but there is a huge amount of distrust, not only amoungst those re-employed, it's now amoungst the whole staff, they get worried when they see the HR Manager coming to a meeting"*

Central themes	Sub themes	Words / phrases (direct speech)	
		K: *"It definitely was. Quite interesting because we set ourselves a target of tuning the business around and making a profit after 18 months. The new owners were a well-known brand already, which helped and we managed to on our own achieve target within the eighth month. The positive spin-off to this was that we could bring back people into the business, not everybody, but some, which was definitely our aim to do"*	
		L: *"Business sense wise yes, in Company [Name]. The merger was successful in that in a very depressed market, we achieved 12,5% volumes growth as per our recently published results. There was no point in having duplicate services and jobs, I think that made a lot of sense, we may have ended up in bankruptcy had we not restructured after the merge like this. The wage bill was simply too high, but the packages were very attractive and beneficial"*	*"Operationally, no, not in the first one, while we lost headcount, we didn't adjust business processes, we had to achieve same outputs, same targets with reduced numbers of people, so we took on casuals. With the new labour legislation, we ended up 'ad infinitum' renewing contracts, which took a lot of time, so we actually were not more efficient or effective in that sense. We had definite human damage too, it was traumatic for some"*
		M: *"Yes, I think If we haven't done a major restructuring six years ago there's no chance that we would be where we are now. The restructuring we have done now we are still in the white water, there's still huge change. [Name] will come in now and talk about the fact that it is not right yet... I'd like to think that a year down the track we'll look back and say, yes it's tough but we got through it and it's right now. So it has to be that were doing it for the right intention. If we where cutting heads for costs savings, it may be a different thing, because then it's just a survival thing, we are just staunching the bleeding. Whereas the retrenchments and restructuring have been about making this a more efficient business and more effective and more streamlined. This has contributed to the people that have stayed"*	
		N: *"We took out millions that we said we would take out, but the unintended consequences were some, some loss of operational control, quality problems, obviously morale was down for an extended period. So, you've got to think about more than how many millions I can take out. Organisations have got to be ready for the backlash and how to calculate that. Don't feel bad if you have to bring five or six people back, because their particular skill is now missing. That's, not a sign that you failed, it's a sign that you just need to make some adjustments and if you need to call them back, call them back"*	*"A lot of people actually came back in the follow up period, we found it necessary to bring back three or four people due to operational reasons in my area. But then I had to do another wave of retrenchments In 2004, so I had to do it all again a year later, on a smaller scale and it was only a year later in 2005 that we tipped the scale again"*
		O: *"In the long term, yes, we were going to close down this branch in any case and we did so successfully. We sold off various business units to managers who then started their own business"*	*"But, while we closed off the branch, there was definitely a human cost, people lost their jobs. So in that way, while we successfully closed the branch. I don't think we achieved the objectives. I don't think that dealing with human factor was part of the objective anyway"*
		Q: *"We did end up going back to and focusing on core business"*	*"But there were other real issues that didn't get addressed by the retrenchment"*

Central Themes	Sub themes	Words / phrases (direct speech)		
Procedural	Good business	Yes	No	Undecided

experiences	decision?			
		A: *"It might serve the retrenchment reason, but…"*	*"If it goes on for months and months, then it is bad for the business, because people leave and then we also lose skills, because of LIFO"*	
		C: *"In Company A, yes, because it achieved the goals set out and the reasons given. It was necessary and anyone at that stage would have seen that it was on the fat side and needed trimming"*		*"In Company B, as I left, I have no idea, but I heard that after 3 years they basically closed the place down, difficult to answer that one"*
		D: *"Depends on how you do it, if you do restructure, do it properly, big and once. It costs a lot to have 10 – 30 security guards sitting in your system waiting to get a site and we don't generate income "*	*"If you do it as a short term solution, no"*	
		E:	*" It depends, if it was because of poor management practices, then no, but perhaps that was the only decision to make. Sometimes too hasty, because it's amazing what happens over2 months or so somebody resigns, takes early retirement, somebody needs a new secretary and all of a sudden things change. It's a good lesson to learn. Don't go in with preconceived ideas, things can change quite drastically "*	
		F:	*"If It's not for the right reasons"*	
		G: *"From a cost point of view, yes"*	*"In hindsight, you end up reemploying right back to where you were and could we have dribbled it a bit… maybe done too hastily. Sometimes its done just to please your shareholders, sometimes you lose the longer term impact, you lose skills also"*	
		H: *"Ja, it has turned this business completely. We are a highly successful, highly profitable business, because of that situation"*	*"After we retrenched so many people. We said, Ok, maybe that was too much, maybe that was too little. Ok, we sort of then started polishing, it you can call it that"*	
		I: *"I knew what we where trying to achieve and it was for the greater good of the company and the other employees. In hindsight we could have been stricter or 'ruthless'. In my case I ended up having to fire one of them, which just made things worse, you know instead of retrenching them then and there"*		
		J: *"What we did was right for the business, I am comfortable with that"*	*"My problem is how we did it, I think we were too hasty and I did not like the way it was done"*	
		K: *"We had to focus on increasing the profits and we did"*		
		L: *"It made business sense, because it would have been fool-hardy to carry on this way"*	*"But human sense? It came back to bite organisation, in the form of skills lost"*	

		M: "*I think it is a necessary business decision, particularly for example when you take senior guys out of the business who don't fit anymore, they are doing more harm to the business, in every case there has been an actual improvement in culture, because the guys below see what is going on, they know who is not living the values and if they see us taking action, it actually strengthens the culture*"		
		N:		"*It is so difficult to say, it's not a precise exercise You only find out once you have done the restructuring, if it's really going to work, or is something going to fall through the cracks. Then you have to start making these adjustments*"
		O: "*We were closing the branch and it was time for people to get out of this negative work environment*"		
		Q:	"*The organisation had not been doing well for years. Retrenchment however could not solve all the problems*"	

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Consultation with all stakeholders, alternatives sought and suggestions evaluated**	**Participant A:** "*the unions forced one to dot the i's and cross the t's and so there was almost immediate **consultation**, whereas in the case of the white collar workers, who were not part of the union, consultation was not as extensive and they got less of a fairer deal, because the unions know their rights, so thank God for unions.* *Insofar as **alternatives** that were explored, in three of the four organisations that I was involved in, that was indeed the case, but it depended on the nature of business and type of opportunities that were available. If the organisation was able to accommodate alternatives to forced retrenchment, they would. In Company A, they put together an extensive spreadsheet of names and their skills sets. But with an organisation that size, we were 17 000 people, even though one wanted to offer first option to those who where affected, it was a very impersonal process and nobody managed that list.* *In Company B, which was much smaller, it was about getting back to the core of the business and so no alternatives were considered, you know in an advertising agency, you cannot just stick an Account Executive in a Creative Directors job.* *In Company C, the retail company, it was easier to offer alternative jobs as the skills required were not of a very technical nature because whether you sold sewing machines or whether you sold cheese, its easier to transfer labour, whereas with the last organisation, which experienced a merger, it was difficult to train people on highly specialised and technical skills within such a short period of time.* *Opportunities were provided for employees to offer **suggestions**. 9/10 times employees would say that they 'hated' management's suggestions, but they rarely offered alternatives. With the lower skilled employees perhaps it was a lack of ability to conceptualise alternatives, they were very good with emotional arguments, but intellectual arguments, well they just wouldn't come back with ideas. I don't*

Central themes	Sub themes	Words / phrases (direct speech)
		really know why, maybe they felt that management had in any case made up their minds, so they took a: 'God's water oor God's akker approach, kom ons wag nou maar vir die valbyl'. Perhaps they were right, because companies do what they have to do and the unions and shop stewards understand this very well" **Participant C:** *"In Company A, immediate consultation with the union as they had that sort of relationship, where they felt the union had a role to play. All the people were called in shop stewards and management.* ***At all times all stakeholders were involved.*** *In the beginning* ***alternatives*** *considered were short time, job sharing, different shift patterns etc, and* ***consultation*** *went on for a month but eventually we had no alternative but to make positions redundant, which meant those people had to go.* *In Company B, it was totally the opposite, it was a complete 'we don't care attitude', it was cold. I mean if you can believe that you can walk into a company and over a period of 4 days, retrench 50% of your people in a company that employs 200 people, it was done. The union organiser was called in. As management we were not allowed to sit in on that meeting, only Exco behind* ***closed doors****, we got no feedback. The next thing, the union organiser walked out of that meeting, got in his car and drove off and left 100 hourly paid workers retrenched the next day, they literally paid them out the next day"* **Participant D:** *"We follow the letter of Section 189, making sure that we do not deviate from it. We also* ***always consulted*** *with the union because they don't necessarily make it easier for you, and we have to engage them as well.* *The Act states that as soon as you contemplate retrenching someone, you must notify him or her. But we keep the* ***consultation*** *letters back a bit, right or wrong but it works better for us, because we first want to see where we can transfer, because the nature of our business is that you gain and lose contracts so quickly. So if positions are available we transfer them from site to site at our discretion. It is in their employment contract. They won't even know that their head was potentially on the block, but if you see that it is not going to work, then we send out contemplation letters saying that their contract will expire at the end of the month. We employ on a contract basis. We usually give ourselves two to three week's period before the contract ends so that we have enough time to consult properly. In the contemplation letter we state everything. We say that we have tried to win other businesses. We attach copies of letters that we send out to other regions in the country, with their replies. We mention on the letter that we see that you are or are not a member of the union. If you are a member of the union you have a right to have a representative. We cover everything that we can in terms of 189 on the letter. Give it to them and a couple of days later first thing we do is meet with them and their union reps.* *The* ***options*** *we look at are transfers, demotions, overtime reductions and so on.* *We always give them homework to come back with* ***suggestions****. Make them realise that their career is in their own hands and not necessarily mine and they must come back with alternative suggestions, in some case people do, but rarely so. They feel that: 'you are the boss, you must tell me'. They would rather blame management than themselves. Overtime reductions, they don't like, because they can make a lot of money on overtime. At times they would accept demotions"* **Participant E:** *"I also tried to educate my clients about putting retrenchment policies and procedures in place beforehand and would sometimes have to 'scare' them with the law, because they were so 'green' about this.* *Unions and in the non-unionised environments, all stakeholders were almost*

Central themes	Sub themes	Words / phrases (direct speech)
		*immediately **consulted**. I immediately contacted the unions but they played no part in what was happening, we invited them to attend meetings, they never pitched or returned calls. There is a very small group of unionised people here, who would be affected, in my estimation; it was not worth their while to be involved. As I said, one union responded and said they would attend, but never did, the other union never responded. We did however keep them informed and updated on what we were doing and so on; for the rest, we continued with our consultation processes with all, explaining that we were considering the closure and what the reasons were and started talking about **alternative options** like vacancies within other areas in the division and that those affected would be considered first reminding them, that would have to apply of course and follow recruitment process. But because we were going to open another type of research and development unit, we eventually landed up, only retrenching five over here; we found positions for all the others. We also **consulted on the process** to follow for shut down; we had to consider things like what was going to happen to the project, we had to decide this together, how we were going to shut down, what was going to happen to everyone, what was going to happen to the animals that were being used in the trials, because we develop vaccines, so all aspects of people and business were discussed and they all played a part in that.* *Very rarely were **ideas offered**. They would rather trust management to come up with ideas. They were new to it, never been retrenched before and would look around the room and say: 'well if we suggested early retirement then two would be hit' and they did not want to be responsible for creating that environment"* **Participant F:** *"Employees were **not consulted** insofar as the contemplation to retrench or **suggestions** for **alternatives**. They called me in after I returned from overseas and told me that they had already made a decision, without any input from my side, but they did want to be seen to be following the law. In my view and so only then asked my opinion on that. We consulted with the affected employees after the fact. The decision was already made.* *I did recommend to management that we look at asking for ideas and **suggestions**, but they in all honesty were not interested in things like redeployment. After we notified the potentially affected and asked them to get back with suggestions, we simply sat around the table and discussed what was in fact going to happen.* *I have never blushed during a consultation before and I was sitting there in the one-on-ones thinking, 'hypocrisy, I wish somebody would take him to the CCMA', I was thinking words that are unprintable; I think my body language to him said it all"* **Participant G:** *"**Consultation** was always the first thing to happen, before we made the final decision. Say for example, EXCO decided to work on a new model, they would communicate the proposal to everyone and give comments why; from a business point of view it should be done. They will send out a mail and then all would get **an opportunity to respond**. Management would then **review comments** and agree or disagree as the case may be and give **feedback** why"* *Once the decision had been made to go ahead with retrenchments, affected employees would be given **options** of redeployment, they were not necessarily nice options, but if it was a choice between having a job or not, at least they had the **choice** and they were making the choice for themselves"* **Participant H:** *"In theory, yes that is how it is supposed to work, but by that time **we already have decided to do it obviously**. So mainly, once we go into a retrenchment process, it is already a done deal. If you have a very clever union rep, they would come up with **alternatives**, but they normally see where we are coming from and I think in our specific company or industry maybe, retrenchments have*

Central themes	Sub themes	Words / phrases (direct speech)
		*been a part of their lives for so long that they become part of the process, more than what they fight it. They did, the first one, I had a huge battle on my hands but now it is a case of: 'I know where you are going' and they also see the benefits of the retrenchments. So I have built a relationship with the unions, so that we don't just do this because we have nothing else to do this month, because we are bored or whatever. There are always good reasons for that. So we try and **minimize** retrenchments. We try and **get alternatives for the guys or they would try**. One of **their ideas** that they came with is retraining in a skill like brick-laying or cooking skill. They will also put into place like a re-employment agreement. So within a year if there are any vacancies that we specifically recruit from that group. Or, they would look at our business structure and ask: 'who's going to do that, you know'; good point, you know. Or: 'you are outsourcing your cleaning service; can't you tell that outsourcing person, our people need jobs?' So they will come up with all sorts of ideas like that to retain employment for all the staff"* **Participant I:** *"We had a large company communication session where Simon got up and explained exactly what we were trying to achieve and as result that there was going to be a restructure. Subsequent to that we had quarterly communication sessions, which in many cases have been used to reinforce our vision and value system"* **Participant J:** *"Well the employees were communicated around the possibility of 'some moves'. But we just sprang it on them and they were left wondering: 'but why me, why have you done this to me?'"* **Participant K:** *"We had immediate **consultation**, as the new owners wanted everything to be transparent and open. We got and at least considered employee **suggestions**. In one instance, some of the more senior managers, coming forward with suggestions that had never been thought of before to keep a branch open and in some cases, some branches did remain open for longer. **Not all suggestions** for alternative options could be entertained, but the opportunity was certainly afforded. Redeployment where possible was considered and employees had the **choice** to accept these"* **Participant L:** *"In the early days, yes we **consulted** with the unions and we did look at alternatives, but they weren't very skilled business-wise, it was more political, you know during the 90's. So we would propose what we wanted to do and say 'come back with counter proposals', but they didn't have business insight to come up with viable **alternatives**, so it really was just **procedural** stuff.* *With the merger, we **consulted** if you can call it that by way of giving people **choices** to apply for positions and then we would interview them. We only really consulted with people who's skills we didn't want to lose, I think"* **Participant M:** *"We **consulted** at senior level to decide on the best structure for the company, job functions; skills required and had an application process. A lot of checking was involved of process, doing benchmarking against international and local norms, checking our own theories, whether the more streamlined process would work or not. We first did our homework for about two months to ensure that what we presented to the employees showed that we had given this good and proper thought. Then we took it down to an individual level. Every person in the company could indicate preference for jobs and we did some 25 interviews, where people could motivate where they think they could slot in. There was quite a lot of participation in that.* *The last restructure was probably less participation because a lot of the positions were quite obvious and the ones that weren't we were saying, 'right now if we look at the structure we can't see a place for you but we like you to give us a **your ideas'**.*

Central themes	Sub themes	Words / phrases (direct speech)
		*Also where else in the group, are there other **alternatives**, how can we help you to look at those alternatives"*
		Participant N: *"I don't sit in on board meetings, but I think it was six weeks before they broke the three weeks before the formal notice went out. I remember the union putting forward **suggestions** for selection criteria. I think it was voluntary as the first option and then LIFO, which was for the unionised part of the workforce. As for us at a more senior level, we had to apply for positions and were interviewed and the best person for the job was selected. Then three weeks later we were told who were successful. There were seven of us and there were three positions"*
		Participant O: *"We were just told from head office that we were closing down and that we had to manage that process. I had to be that advisory role to the manager to say: 'well, this is what we need to do. We need to **consult**, go through all the processes'. We basically just stopped what we were doing and started information sessions with the staff members to say this was the plan, what we were actually going to do about it, it's a head office's decision. We still gave people an opportunity to come up with **ideas**, if they wanted to or could. But it was not going to save the unit as a whole."*
		Participant Q: *"The organisation stuck to the provisions of section 189 from the onset. We were not unionised at the time. Staff had a democratically elected forum, which they agreed could be used for purposes of **consultation** and communication. There was direct communication with all staff members when it was deemed important.*
		***Alternatives** we instituted were: no new appointments were made unless it was absolutely critical to core business; no further contract staff were taken on; some contracts were terminated or not renewed; overtime was only worked where it was imperative to complete an order; voluntary retrenchment with the retention of key skills and early retirement"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of procedural justice/fairness (Selection criteria & alternatives)**	**Selection:** **Participant A:** *"In some companies, departments would be earmarked and then you look at the functions within. Can you do without two admin clerks, for example? Can you do with just one?*
		In the other companies LIFO was looked at, definitely the most popular one, but whether it was good for business, I don't know, because you sometimes lost good people that way. In one company management had to rethink this and they put a deadline on it and so from a certain day, you could no longer do voluntary application, that was because they didn't want to loose good people anymore"
		Participant C: *"In Company A, we followed the LRA, literally an organogram was drawn up and shown to people transparently in the beginning although they weren't quite sure if they were directly affected at that point. The next step in the process was Ok, call in Mr X and tell him unfortunately your position will be redundant and there are no alternative positions and you will be affected by the retrenchment. Funny the way it worked out, my older guys positions happened to be the redundant ones, they were offered early retirement first. It was a phased process. Once we had exhausted voluntary, we applied LIFO in Company A"*
		Participant D: *"If we don't have alternatives like redeployment or demotion, it's always been LIFO with us, excluding specialised skills and good work performance,*

Central themes	Sub themes	Words / phrases (direct speech)
		which only works if your operations people kept good records.
		The more senior staff, don't want to wait out the consultation process and they would say 'I know how it works, you don't want me here anymore' and so would negotiate an exit package and leave immediately. In the beginning, they think they are high and mighty. But we cut them down to size, especially if we have incident after incident with the client and we show them the client file and then transfer power to you and then you can talk sense into them"
		Participant E: *"In one company that I contracted to, 'fly-by-nights' underbid us, so we lost a lot of business and had to severe an arm of the company. In other instances, like the semi-state owned one, we were no longer economically viable and the decision was made to close down the R&D section. There would always be selection criteria agreed on.*
		Voluntary was offered subject to being able to refuse, because we had some long term serving folk and we needed their skills. Often the 'good apples' applied and wanted to leave"
		Participant G: *"Within the banking industry we are driven by technology or electronic changes. So we look at strategy, and the organogram, what does the structure look like, how many jobs are created now, offer it to the guys, here or wherever in the country. Those of you who can't relocate are obviously eliminating yourselves from various options. Then lets see if we can find you a job, which you would like in a different environment maybe. That sort of process will go in circles until everybody has sort of looked at all opportunities they are interested in. If there is nothing, then I eventually accept I have to go…When I was in manufacturing, it was LIFO"*
		Participant H: *"With the one retrenchment they would look at our business structure and ask: 'who's going to do that, you know; good point, you know. Or you are outsourcing your cleaning service; can't you tell that outsourcing person, our people need jobs?' So they will come up with all sorts of ideas like that to retain employment for all the staff.*
		New machinery is not something we could hide from them. So they know what's coming. But there is communication around that we are commissioning a new machine and we find that it is much more effective and we actually can do without one less person there. So it is only after we see it in production that we see the efficiency that it is going through, that we realise but here is an opportunity to pack down one person per shift. That kind of thing. Ja, so if we know, then we would consult before the time.
		That's the biggest fight. We would suggest, obviously the first thing is skills retainment. So the person who is the most skilful, you want to retain, they agree with that. So that is fine. Now you get the unskilled workers, like packers, or whatever. Now it is a fight because we want to keep the young folks and they always go for 'last in, first out'. So, that is a huge fight, especially with packers, because it is physically demanding job. Ultimately at some point there's normally a negotiation on what they want and what we want in exchange. So you agree to keep the old packers in exchange for something else. So you know, I always use a sort of bargaining tool, or whatever. So, Ok fine, you can't have 2 weeks extra, you can have 1 week extra but ok then, you can keep your packers that you want. You know that kind of thing. I also work out the numbers. Ok to retrench the older guys can be more expensive than retrenching the new guys.
		Normally if there are other positions or vacancies in the group or in the company we try and re-employ them or I would speak to a recruitment consultant or to a

Central themes	Sub themes	Words / phrases (direct speech)
		labour broker and tell them I have got this batch of employees that has really got good service blah, blah, blah, so I try and outplace them or negotiate a better retrenchment package for them and I also talk to the directors: 'look, can we have R2000 extra for every person so that they can go and learn how to do brick lay or tiling, or whatever' and then we pay the training provider to try and help to get them retrained in something else. *Sometimes after a big retrenchment, we find that maybe we have cut to the bone, so we re-employ or we would pick up new business"* **Participant J:** *"In the first wave, we looked at the actual job descriptions and who then could fit into that box and whoever was left over, unfortunately we had a problem with"* **Participant K:** "*It took place over a two year period, a slow process of restructuring the business and we took it department by department, until we had realigned the business to the new strategy in terms of job functions required. We stopped all recruitment immediately and redeployed to branches where we could. As soon as we could bring people back into the business, we did.* *We followed LIFO. We had all those records of the people for example all the branches that were closing their length of service, all that taken into account and then the suitability obviously for all the other positions that existed because they could easily fulfil the same roles elsewhere. Some of them we looked to explore other positions even if it was a demotion in some case"* **Participant L:** *"With the early days where I was involved, we were told to do it. We as HR, then draft plans in terms of how to go about it to minimize the impact and that we are not challenged but we suggest alternatives, we ask questions, you get your legal opinions way before you start the process. And once you sorted out your line managers in terms of what are the minimum people they can run for example a production line with and who are the individuals who will be impacted and what are the principles you know the LIFO principles, then go look at who those individuals are, and I think that is one of the things that went wrong is that we just went with the principle not considering the skills that you are going to lose. Also some tried to soften the blow by offering early retirement packages, again, not considering the impact of the skill you are going to lose. So a very flimsy process in those day.* *With the merger, a structure for the new organization was identified. People had to apply and between the two companies there were 5 000 employees. And in the new organization 3 600. First of all early retirement packages was offered and the cut off age was 56, like with in the early days, with the factory retrenchment. Here with the merge, a huge amount of people took it and it came back to bite the organization, because we lost skills. It was the same in the early days, with the factory"* **Participant M:** *"We had every person in the company applying for positions and indicating their preferences for a job, so there was consultation in that way with them. We also looked at positions within the group, are there alternatives for them and how can we help you to look to these alternatives, quite a supportive process, I think"* **Participant N:** *"Fortunately I was one of the successful candidates and then given the job of designing a new structure. That took me about 5-6 weeks, after which I shared the contemplated unpopulated structure with everyone and with HR. I had a number of question and answer sessions. I would get input from everybody else. And as a result of these sessions, I changed it a little bit. So finally it was an agreed structure. I then put in the criteria required to be successful at that job and again consulted with the guys for their input. There again were a couple of alterations and*

Central themes	Sub themes	Words / phrases (direct speech)
		then I started the interviews. I think it was a fair process. We decided to have a group of generic criteria you know, length of service and so many years in a similar job, to the one in question. And I can't remember the exact detail now. We've got four or five criteria on how the person must look and then a whole list of strengths, qualifications and experiences specific towards that job. And as I was saying, they were then issued to the pool of applicants and we commenced with the interviews. *Part of the workshop warned us about using this as a chance to get rid of people you didn't like, you knew you couldn't do that and some of the people, I think, thought attendance records and so on would be part of the selection criteria. But I made it clear to them that we would not mix disciplinary issues with this.* *LIFO applied to the unionised members, but we lost skills"* **Participant Q**: *"We stuck to the provisions of the section 189 from the outset. Changing organisational strategy meant focusing on core competence requirements and eliminating redundant/surplus skills, there was a bit of right sizing also involved. It was also seen as an opportunity to cut costs in a situation where overheads were extremely high and income very low"* **Alternatives:** **Participant A:** *"People were also transferred, especially if it wasn't a skilled position or where you can offer office jobs like secretary and admin people. Those are easy ones to have a list and offer alternative employment"* **Participant C:** *"We offered early retirement to the older guys in Company A"* **Participant E:** *"Any vacancies throughout the companies had to be looked at and those people had to be considered first. Because we where opening another R&D, quite a few of those people where obvious people but they still had to apply for them and obviously there was a selection process and the best qualified for that. We fitted people in where ever we could and landed up retrenching 5 over here"* **Participant G:** *"Invariably you will find that the majority of people will end up being used elsewhere, I mean we have got sufficient vacancies elsewhere and it's going to be up to them if they want it. We will maintain your salary, but like in my case, the net effect was that if I look at what I was doing then and what I am doing now, I have moved back 15 years, but it was my choice. I think in general the process is fair, because at the end of the day you have a responsibility to the organisation and the people, because whatever you do, they must have the best opportunity to be successful.* *We don't have a lot of forced retrenchments, because the process takes so long and a lot of people actually step up and say they want a package. With the last restructure a lot of people took the package or early retirement to start their own fish and chips shop say, they've got the financial skill to run it and if they do well, they can leave it to their kids, it's not a bad option. I also think that EE plays such a large role nowadays, they realise well I am not going to get job because of an EE candidate. It's good luck to him, but rather give me a package versus me resigning with nothing.* *At least we were giving them choices. And if I have to choose between having a job in Upington or am I going to stay down here in Cape Town with no job, then very quickly we had guys saying: 'yes we are going to Upington'.* *Everyone gets affected, there is a period of uncertainty, and that goes for every single employee, because even if you know you are still going to have a job, but you don't know if it is going to be the same"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant H: *"We have a re-employment policy, but we have had people back and they sort of hold it against the company for ever and we would never get the full benefit of that person again. We would also want to try and bring in new blood as much as we can. But if we have an agreement with the union, then we would bring them back again and we would say: ok, but we can pick and choose for positions"* **Participant I:** *"The new management team that was brought in, had to look at their department and put together a structure, but also with the right fit, from what we wanted our culture to be and therefore obviously people that didn't fit from both performance and a cultural values point of view were retrenched"* **Participant J:** *"With the second wave, what we did with that is we managed to outsource one of the divisions completely. It had its dramas, but we made sure that everybody kept their jobs at the same salaries and perks and that was another six people. We just reshuffled the second division and we managed to give everyone a job somewhere within our business and not get rid of the"* **Participant K:** *"Everybody was affected…Something positive that happened was a general manager who took a risk, having a family and responsibilities and he opted for a demotion as a service manager and within a few months, he was back in a senior role"* **Participant N:** *"Over that period we had a lot of staff turnover too, we have that a lot in this industry and we had some retirements too. Everybody was affected. I think there were 2 directors, a chief accountant, senior financial managers and 2 or 3 very senior managers, I can't exactly remember"* **Participant O:** *"We closed the whole unit, so everyone was affected"* **Participant Q:** *" No new appointments made unless absolutely critical to core business; no further contract staff taken on, some contracts terminated / not renewed; overtime only worked where imperative to complete an order; voluntary retrenchment with retention of key skills and early retirement"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of distributive justice/fairness (Severance pay, benefits, assistance offered & re-employment)**	**Participant A:** *"90% of the time we pay more, so it was very, very attractive, because they wanted people to take it, hoping that the 'bad apples' would go, but on the downside the 'good apples' applied and wanted to leave, this caused a dilemma and management stepped in and imposed a deadline to minimise the impact of losing good employees.* *We offered lifts to go to an interview. I am very passionate about my people and so I would do everything possible to help them, after all this was not his fault. We didn't at the time but I think company's aught to offer family counselling as they have a social responsibility to, especially where you have a situation of spousal or substance abuse, because 'hy gaan huis toe en hy gaan drink', because he doesn't want to feel the pain and then he abuses the family at home…it happened here"* **Participant C:** *"In Company A, they did more than minimum, they sweetened the pot a bit, in multiples of 5 years of service, so for every 5 years extra, you got extra"* **Participant D:** *"One weeks pay for every year of service, leave pay, provident fund etc"* **Participant E:** *"We stuck to one week, but we offered the payment of Medical Aid*

Central themes	Sub themes	Words / phrases (direct speech)
		for three months, unless they found another job, we offered financial and retrenchment counselling for them and their families. We paid out all leave, and there was a few benefits from the state thing and we did not take service from when they joined us 3 years ago, we took service all the way back, so in some cases it was 35 years, 28 years" **Participant G:** *"The package is good but the downside to this is that you sometimes have to buy back skill because you lose that. We have an Employee Help Line, where people could phone in to request emotional or psychological assistance for themselves. And then we had dedicated HR people looking for internal vacancies countrywide, contacting you and saying 'look I noticed this vacancy in this place, would it suit you', so its not just left up to the individual to see if they can find themselves another job, it's actively driven by the company. We also present seminars on 'how to start your own business' and 'how to budget", we also offered to pay for or make a contribution to training in another area"* *Participant H:* "*We actually have an agreement with the union, which is a retrenchment agreement. It is two weeks per every of service and 9 months notice pay and other bonuses. Counselling is not offered, but when somebody is going through it very bad, I do refer them to a psychologist and I have referred probably about 4-5 people. I have got a very loose policy around that you know, I would try and support the person as much as possible. And I also invite them and say: 'look if there is anything you need, please speak to me. It is not a nice process to go through and really, if there is anything you need, anything at all, come and speak to me'. I try and provide the opportunity"* **Participant I:** *"The package was definitely better than the law. He got a very good package because of his years of service, so it's not like he had an immediate financial problem"* **Participant J:** *"Basically we gave people packages, probably double than the norm. There were one or two people who had shares and we arranged that they all got paid out ahead of time. At the end of the day, what we did was fine. What they got was great"* **Participant L:** "P*ackages offered was very lucrative in the merger: 4 weeks for every year of service, which was far more than what the minimum requirement is and definitely a trend setter in 2001. Specifically in that market. With the factory we offered exit programs, like business courses and training on brick laying and sewing, but very few took it up. In the merger, we didn't have exit programmes because we tried to accommodate everyone in some form or another.* *With the factory, additional to the package, people could keep their company vehicles for another 3 months to give them time to find alternative transport"* **Participant M:** "*The people that are negatively affected immediately settle back and talk to them and keep talking to them. Quite close relationships are formed with some of the people that are negatively affected. There's a: 'we are going into this together this is not about you it's about what the company is about'. We gave 2 weeks for every year of service. If a person was close to retirement, we put them in touch with financial consultants, some of them we would pay for to give them financial guidance on what I do with my pension money. We gave people access to the recruitment department to draw up CV's, look into the market, contacted external agencies and say 'can you take these people on to your books' and, giving references to people. We didn't offer family counselling; I had an interesting experience in a previous company. We had got to the stage, we're going into retrenchments, well maybe when we go through that discussion we should be involving the family in the discussion. There was a huge reaction when we suggested*

Central themes	Sub themes	Words / phrases (direct speech)
		it to the employees that, they didn't want that. That was a very male dominated conservative environment, I think what was happening there was that the men was seeing themselves as the head of the family: 'I'm the breadwinner, now I am loosing my job and I don't want to be doing that in front of the people I am meant to be nurturing and caring for'" **Participant N:** *"I think the package was 2 or 2 weeks for every year of service and the there was th other usual stuff. The individual was encouraged to go to HR to see exactly what their package was going to be"* **Participant O:** *"Most of the people had been working for this semi-government unit for a long time, almost their whole working life, their packages were quite decent. They also paid out your pension fund, and a pro-rata 13th cheque and any leave that was due"* **Participant Q:** *"2 weeks for each year of completed service (pro rated), paid out all leave pay owing and pension, Medical Aid coverage for 3 months following retrenchment unless new job was secured in this period. I think it was favourable in comparison with prevailing BCOE requirements and industry norms. It was favourable also i.t.o. affordability to organisation. Our division had to have additional funding made available from our "head office" to cover all the costs of retrenchment and enable us to effect some kind of visible saving. In general I think it was fair, but there will always be complaints. Some long timers happy to leave with a 'big package' but others disgruntled, believing organisation had let them down. Some younger/less experienced feared permanent unemployment"*

Central themes	Sub themes	Words / phrases (direct speech)	
Procedural experiences	**Types of Assistance offered**	EAP's (Employee Assistance Program) or retrenchment counselling for the individual	A, C, E, F, G, H, I, J, M, N, Q
		EAP's (Employee Assistance Program) or retrenchment counselling for the family	E, C, E,
		CV updating	A, C, E, F, G, J, K, M, O
		Financial Counselling	E, G, J, M, N
		Registering the affected with recruitment agencies	E, C, F, H, J, K, M, O
		Writing of reference letters	A, E, F, H, M
		Coaching on interview skills	A
		Paying for retraining	G, H, Q, L
		Using company facilities to look for another job	A, E, G, J, L, M
		Allowing time off for the affected	A, E, G
		Looking for vacancies on behalf of the victim and notifying them of any	A, D, E, F, G, H, J, Q, L, M
		Data base, should vacancies arise	A, D, E, G, H, J, K, N
		Informal counselling (not a policy of organisation)	E, F, H, K, Q, M, O

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of fairness: Informational justice**	**Initial Communication and Notification:** **Participant A:** *"There was a lot of communication and you had to do it very quickly. There would be bulletins going out with a lot of information"*

Central themes	Sub themes	Words / phrases (direct speech)
	(Communication & notification)	**Participant C:** *"The news did not come as a surprise initially in Company A. We subsequently had a long consultation process with all the employees and the union. We had company briefs and plant addresses about the fact that we were cutting back. I think we over communicated, which helped a lot"*
		Participant D: *"The Act says that as soon as you contemplate to retrench someone, you must notify them. But we keep the contemplation letters back a bit, rightly or wrongly but it works better for us, because we first want to see where we can transfer. Eventually, I did it so well, they just left it to me and I did all the retrenchments for the company. I don't think it comes as a surprise, because they know they are working on contract"*
		Participant E: *"They were in fact surprised that the division had not closed earlier, particularly since we were state funded and there was no economic logic to the project being continued, it would mean another R42 million being pumped into it. In fact these people were so relieved to have me there and so I was happy to do all communication because I have a certain process that I follow. Particularly if I think about some of them, who just had no idea about how to communicate. Nevertheless it still does not take away from that initial shock reaction experienced when hearing the news that a final decision has been made and that some people will go. Communication increased and we had quite a long process of to-ing and fro-ing: interaction, interaction and eventually we would start getting to the nitty gritty and they ask questions of management and I would go away and say: 'they are asking for, you know what can we do here' and so on"*
		Increased Communication:
		Participant F: *"Our CEO didn't want the others to know for some reason initially and it was quite interesting to see what transpired. The senior guys that were affected also didn't want others to know, They preferred to resign and a lot of negotiation at that level took place, in terms of pay packages and time left to stay with the company, other than that, particularly with the lower level employees, communication did increase"*
		Participant G: *"Your communication increases significantly. The process takes about two/three months. The MD explains to them at the start. So it's not as hush-hush scenario, it's all right up front. First you have the voluntary scenario and people are aware that this now may happen. So the majority of people know that their department is going to be closing down, they know that they will have a chance to look at various alternatives and they know that if they don't take an alternative job, then it will be bye-bye"*
		Participant H: *"We would sit with the unions first and say: 'look this is what's happening, they would then ask for a union management meeting or for a feedback meeting with their staff'. But I also give feedback. So I would say: 'Ok fine, you can have your meeting when you choose, I will have one on Monday'. So I speak to the employees first. I say: 'look this is what's happening'. I will just give them the information that I have given to the union, exactly the same format and that: 'the unions will speak to you tomorrow'. So, I don't go into discussion. I just give them what is coming, what is happening and then I sit back and then the communication is between the union and us. Then I don't speak to them again. They would come as an individual to me if they wanted to. So I would speak to the unions, it is their members, but I also want them to hear from the company and if there are any questions relating to a specific reasoning, I can answer it directly, so that you don't have the union really giving the bad news.* *Then I would sit down with, with the individual and explain with, his or her manager. But the manager would do the talking. I really just facilitate the process most of the time. Sometimes I do it on my own, but the manager will explain, because he is the one that you report to first. So he needs to explain why, what the*

Central themes	Sub themes	Words / phrases (direct speech)
		story is and I would just outline the procedure and the process and what we expect from them in terms of coming up with alternative suggestions and stuff like that. So that would be the first meeting and then the employee would go away, so shocked and devastated and I would summarize it in a letter give them a copy. *And then we would have a meeting in two of three days again: 'So Ok fine, have you had a chance to think about it, how do you feel? Blah, blah, blah'. And then the person would say: rather let us do this, or I have accepted it, let's talk about a package'. So it could be resolved within a week or it could take a couple of months of fighting through it. If you start a process like that, you have to go on until it is done"* **Participant J:** *"Ja, we did stand up at the beginning and tell the staff that there were some moves coming"* **Participant L:** *"With the merge, there was lots of communication, especially about having to apply for positions and the procedures around that. We had a merger office that communicated process, which positions would be interviewed, when. They generated ads for the positions, organised the interviews and so on"* **Participant M:** *"After the two month period of checking our theories, once we broke the news, we moved quickly, meeting with everyone and telling them how they would be affected"* **Respondent N:** *"The CEO officially told us. Beforehand there were rumours. I don't think people were surprised, they saw what the rand was doing. A formal written notice followed his address. Communication decreased from the top level after that to the rest of the facility and increased from our level, whose job it was to complete restructuring. I know we had daily updates during that time from the top. We as mangers also met often to discuss how our targets were going i.t.o. getting to the number of employees that were required "* **Modes of Communication:** **Participant A:** *"There would be bulletins going out with a lot of information"* **Participant E:** *"I work in various ways because I facilitate sessions. I allow them to send confidential emails to me or if they want to remain anonymous there is somewhere where they can drop something, although we tell them it is very difficult to try and sort out that, because you do not know how wide that problem goes and quite often if your going into a meeting and say that this anonymous problems dropped in can we talk about it, if somebody would like to own it they may but otherwise lets talk about it. Everybody would look at one individual in the room and they all know that that has been their 'hobbyhorse' for the last two years or something. I put up stuff on the walls and I gather information, again people write their bits and slap it up on the wall and you can read some of the writings and its fairly anonymous and it catches the batches of what are the bigger issues and what are the fewer issues with people"* **Participant I:** *"We had a large company communication session where Simon got up and explained exactly what we were trying to achieve and as result that there was going to be a restructure. Subsequent to that we have quarterly communication sessions, which in many cases have been used to reinforce our vision and value system"* **Participant K:** *"The new CEO was sending video clips saying things like: 'I am thinking of you, this is what we are busy with, what we have done so far' and other little reminders. It was quite different from the previous owners and amazing. In fact, he would come in person and walk around all the branches and talk to people. He had lots of money to throw at this, so from a bigger branding perspective, they*

Central themes	Sub themes	Words / phrases (direct speech)
		would give a lot back to the people, which created a positive energy. Sadly obviously we couldn't create positions for everyone in the new company, but I think everyone was conscious of that and just appreciated his personal efforts" **Participant Q:** *"Within three to four weeks of initial discussions, frequent communication, both formal and informal, one on one, group and general information sharing with all staff. Lots and lots of communication, daily if necessary but generally weekly or as required. The news did not come as a surprise as the organisation had not being doing well for a few years"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of fairness: Interactional justice (Dignified & respectful treatment)**	**Participant A:** *"Must dignify the person you know, it's not about me, it's about the person".* **Participant C:** *"In Company A, in the background while the operational manger was busy with the process, HR was there gauging the mood, they where walking around the factory talking to people asking, how are you feeling, etc. Caring sort of attitude"* **Participant D:** *"They bring in the money; we are here because of them, not the other way round. Then we shake hands and off they go, we always parted in a good way"* **Participant E:** *"Part of the challenge is, how can I do this that these people who have to go from here go with the best we can give them with their dignity in place? I would do my best to try and help them and if even if it wasn't in the budget, we would go out and see if there was something we could do here. The other thing was very open and honest communication"* **Participant G:** *Its not nice being on the receiving side, but I think in banking the company does its absolute best to protect the individual. So it's not a case of 'okay, look you must go now', because we give options, not necessarily nice options"* **Participant H:** *"It is not a nice process to be going through, peoples lives are affected, so we must be quite sure of what we are doing"* **Participant M:** *"We are going in this together. This is not about you, this is about what the company is about"* **Participant N:** *"I got feedback from surprisingly a lot of people who said to me: 'don't worry about it, you're only doing what you have to do and I think you have done it well'. Some people said thank you and shook my hand. I think it was because I worked hard at it and did a lot of talking with them"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of unfairness: Procedural justice (Selection criteria & alternatives)**	**Participant A:** *"You are dealing with peoples' lives here and I have difficulty commenting on my perception of fairness in this sense, there's a lot to be debated around that. It's an open question for me. In some cases you know it's a subjective thing, they want to get rid of certain people, the lazy, the old 'tannies', the non-performers. You saw what was going on. I have yet to see managers doing proper performance management for poor performance. I would like to see it happen right from the top all the way down"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant C: *"I suppose you have to draw a beginning line to somehow objectively identify who is to go...but as to how fair it is...I don't know, how long is a piece of string? We lost the recent recruits who were better qualified, more energetic and dynamic. But then the older guys had a lot of technical design experience, moreso than the younger guys. So perhaps **LIFO** as an objective, fair approach to the older guys, who have given 10 years of their lives probably deserves due consideration. We coldly applied LIFO in Company B. In Company B they blatantly got it wrong. Even insofar as the LRA is concerned, which is very clear. It led to them being sued by a number of employees, who won the case. In Company B, we only used LIFO, because it took too long, in Exco's view to do anything else"*
		Participant D: *"Sometimes operations see it as a way of getting **rid of bad workers**, then you say to them bring their personnel file let's see what you have done by way of managing performance, how many counsel letters, how many warnings did he have. If there is nothing in his file and the guy is adamant that this is a 'bad' person, but there is nothing in his file, you say: 'I am sorry, I can't help you'"*
		Participant E: *"There would always be selection criteria decide on between parties but you'd find things would get bent a little further for somebody who'd been there a little bit longer or this or that or whatever the case might be. People who had **attitudinal problems** or whatever they would try and squeeze it a little so that that one will go and we rather keep somebody else...In those days there was very adhoc performance management. So it was somebody's impression, somebody's chemistry with somebody. But I would do my job as HR and I would scare them with the law"*
		Participant F: *"It was awful, you know we have value and mission statements on our wall and I think it is hypocritical. We have a very autocratic CEO and I saw it more as an opportunity to get rid of people than a genuine concern about operational requirements. They looked at the **strategy** and positions within that and would roll two functions together, so there wasn't duplicity; although all the blocks were ticked, I don't think it was fair; there was a personal and **subjective** component to it rather than based on pure operational requirements. Poor performance management is too time consuming for them and costly, so they would prefer to retrench."*
		Participant G: *"On the mines, if I go back fifteen years, when I worked there, there you would sometimes have a suspicion regarding this oke, because I knew he was a bad performer and line didn't like him, then you start to question the company's **integrity** and I took it up with them: 'hang on a bit, how did you get to this?' So if I feel someone had been treated unfairly, I will fight to the teeth for that individual because he is in the receiving side"*
		Participant H: *"Sometimes with the individual ones, it is more a question of: 'can't work with this guy and to **get him out** of the system'. So your reasons therefore are probably not as honest as what they would be within a more bigger retrenchment"*
		Participant I: *"He had **poor performance** for a long time and hadn't been dealt with. Which I think is unfair on him, so he thought he was fine and here I was telling him that he wasn't, so it came as a shock where it shouldn't have been, so I think that that was a blame on the previous managers he had"*
		Participant J: *"In some cases, it was not a skills thing, it was not thought through properly and people were dismissed on a basis of 'I did not like what you did this week or this month' So it became a thing of who where the **people liked**, as was the case of a designer with 15 years of work experience who did not get on with the buyer and he got dismissed. Now it's come back to bite us because the person they replaced him with is no good. I am busy dismissing her at the moment"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant K: *"Sometimes you weren't sad to see the 'rotten apples go', if I can call it that, If I can be bold enough to say so, but that still didn't make it easier, because it's a person's life you are dealing with"* **Participant L:** *"In the merge, while we tried to accommodate people, it didn't suit certain people, because they wanted to use it as an opportunity to get rid of people they didn't appreciate and in certain business units, **performance** wasn't really well managed"* **Participant Q:** *" While retrenchment took place across the organisation, it seemed that some individuals / departments were 'protected' and **not as objectively** handled as others, a bit of empire building"* **Efficacy of Procedures:** **Participant A:** *"So after a few months, management would come with a motivation: 'I need this staff', so we took people back, although we never took the same people back, lost files, lost phone numbers, wrong numbers, people had moved on with their lives and so on…Good people were lost sometimes and at times the poor performers were retained or the people with almost 30 years experience, but close to retirement or with a lame leg, in the case of labourers"* **Participant E:** *"Inexperienced and paternalistic management did things so that we would retrench and then we would recruit. And sometimes we would recruit half those people back. And then a year later 18 months later we would retrench them again. I think it was horrendous, one woman I worked with over all those years, 15 years, I was with the company, we retrenched her three times and re-employed her three times…I mean it was just, you know, where's the sense of fiddling with peoples' lives like that"* **Participant J:** *"I agreed with the changes. I agreed with the rationale, but in retrospect we went too far too quickly. We subsequently employed back three people we retrenched which I am pleased about; but there is a huge amount of distrust. It is not distrust with the people that came back; it's distrust from all the employees. It really is not funny"* **Respondent N:** *"We subsequently took back three or four people in the follow up period. We lost skills with LIFO"* **Company Politics:** **Participant A:** *"You watch who becomes a new role player, who becomes the stronger ones and who's going to become the force to be reckoned with, so you look at the politics and you listen to the grapevine, I find that's very informative, much more informative than the official communication and I never forget with my one company I got all the vacancies where people could apply, but what the 'stupid sods' didn't do…they put peoples names in already…on the initial spreadsheet and they 'hide it' and I…'unhide it' and went to them and said: 'why did you people bother to lie if you'd already decided who you wanted to employ?'… And there were big eruptions about this in the company…and all it took was somebody who was computer literate, to see…"* **Participant F:** *"The more senior staff, did not want to proceed with the agony of the consultation process and didn't want anybody to know about their being retrenched and so they would negotiate an exit package and leave immediately"* **Participant L:** *"In the factory episode, the lower level ones were chased away almost, whereas it didn't happen with the upper and clerical levels, they were afforded more space.*

Central themes	Sub themes	Words / phrases (direct speech)
		At the top, there was politics in the merger, because you would find the managers appointing guys who would support them from their 'old company' as they would rather work with someone who I feel most comfortable to work with, not someone who was going to resist my every move. And then you would find them offering alternatives at a lower level to the other guy. Some were in a position where they couldn't refuse the lower level job. There was individual who went through a divorce during this time, because his job was his life and this was a small town, so people would talk and he couldn't find another job, so I think the stress just got to him as his whole sense of self was based on his job. Another episode at the senior level was where the MD said to one of the directors: 'why don't you just resign, because I am never going to be able to work with you' and the guy just said: 'why don't you make me resign and he hung on for another five years and finally left last year because it was financially viable for him to" **Participant Q:** *"Retrenchment took part across the organisation but it seemed that some individuals / departments were "protected" and not as objectively handled as others – empire building"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of unfairness: Distributive justice (Severance pay, benefits, assistance offered & re-employment)**	**Participant A**: *"The labourers don't have buffers like other people do, it's a very hard thing, one pay cheque and your out on the street, it's hard. In the one case I had a guy, I think he was a bit retarded but he came to work, sometimes he would wear shoes that were too small for him, he would walk on his toes. He was "dom". And he took a package of R8000, went out and bought himself a leather jacket and made one payment on a bakkie and ended up homeless. You know that's the reality of voluntary retrenchment. He was an adult and was over the age limit and I counselled and counselled and counselled, the unions helped me with him; but he still wanted to take it. R8000 was the most money he'd seen in his life. So is it fair? All the legal requirements were followed but I think it was a "skande" – because that guy should not have lost his job.* *I have never seen lists work, people move away, their numbers change and the lists are so big and impersonal, they just use an Excel spreadsheet, listing a couple of skills, as in the case of one of my large corporate clients with 17 000 employees, it's just too big. Jannie Van Der Spuy in Bellville is not going to know that Annie Van der Poel in…is looking for a job, unless you have dedicated people looking out for jobs, lists just don't work"* **Participant C:** *"Company B applied the minimum, I don't think one week is great"* **Participant F:** *"We went according to the actual LRA formula but only **senior** staff were thrown in an **extra** month, plus various other options. We could have offered more like re-training, just to soften the blow.* *He would offer them a position as a business consultant paid on an hourly rate or a transfer to another department for a lesser salary or retrenchment as option three. But basically when you are earning X, it's not realistic and even negotiable, I mean, really…The company did not offer any assistance, which was unfair. I was told to offer counselling, which I did, but I am not trained. We didn't have an official policy or anything, but I helped them look for jobs and provided them with references"* **Participant H:** *"We pick and choose who we want back"* **Participant K:** *"The package was not great; it was not like they were walking away with something that they could live on for the next month or two. In a lot of the*

Central themes	Sub themes	Words / phrases (direct speech)
		cases, the affected were junior staff too, who weren't earning huge amounts" **Participant L:** *"The problem with the packages from the merger was that we lost good people and so we approached them, especially if they had scarce skills and tried to convince them to stay, those that we didn't convince, and we offered contracts and they would come back for a specific period. And because there were those exceptions, the individuals that were not 'accommodated' took it very personally. Because here is one person who is being accommodated because he or she has special listed skills, 'what about me I have been working here for 23 years. Why don't you accommodate me?' and those discussions were difficult. Very difficult. There was a guy, who applied for five positions. I interviewed him five times. In the end we kept him for three months and that was sad because he was in his early 50's and had only joined four years earlier. He didn't have time to build a huge pension reserve and so that was traumatic for him, he eventually left with his small package* *In the factory it was basically the minimum requirements. In those days people saw R13 000 as a lot of money, but I don't think we made enough effort to tell them it wasn't, because we just wanted to get them out the organisation and three/four months later they came back to us and said: 'my money is up'. I think very few took up the retraining, because they were so hurt. So it was: 'just give me my money, I want to divorce from this'. At the lower levels it was the minimum requirements of the law and at the higher levels; it was 2 weeks pay for every year of service. That was it, no transition counselling. Other than the retraining, it was the end of the relationship and there you go"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	Perceptions of unfairness: Informational justice (Communication & notification)	**Initial Communication and Notification:** **Participant F:** *"I returned from overseas, was told that this is a final decision that morning and a few hours later we started calling in the affected"* **Participant I:** *"I think that came as a shock to him, because as I said, his performance had never been dealt with"* **Participant L:** *"With the early day's factory retrenchment, there were rumours for a long time. We didn't handle that well, because there were rumours, rumours, rumours, then the employees would question, question and we would denial, denial, denial and then the Monday all broke lose and the employees say: how am I going to trust what you say to me ever again"* **Participant M:** *"With the employees, no communication but to a level of management there was a lot of communications and meetings and of course that causes a lot of suspicion in the employees as they see management getting into clusters and they wonder what is going on there. It's been one that I chewed on a lot because if you go to the employees, the company is huge, and you don't have a clear view, it causes a huge amount of chaos and heartache, because sometimes you lose people you actually don't want tot lose.* *The retrenchment did come as a surprise in a couple of cases but as is always the case in a corporate. I think that rumours that something is happening had got out there and in fact if anything there was a degree of relief in allot of peoples heads that at least now we know what's going on. But it was a surprise for a couple of people that it was them, some of them had believe that they where invested in the company, that the company would keep them no matter what. Those where quite tough ones"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant O: "The MD of the company should have come down from Pretoria to consult for the main decision. We were just told that we were closing down and that we had to manage that process. So we got the various business units together and told them what was going to happen over the next 3 months. Thereafter people did not want to really 'consult' with me. All they wanted to know was what their package was going to be, it became a whole calculation exercise" **Mode of Communication:** **Participant A:** *"The communication was impersonal, it was centralised. We were just fed the information via the consultants BPI, and had to go out like puppets and execute. I really had issues with the consultants. I had to do their and top management's 'dirty work', but I tried to do it as gracefully as I could"* **Participant C:** *"In Company B, there was no communication; it was a shock for most people. I heard that morning that I would be retrenched and then four hours later, I told those affected in my department"* **Participant F:** *"The CEO did a good selling job and then he hands over the table to the MD, who just echo's what he just said and then they would refer to me and say: 'now if you have any questions and that I would do this and that and take them through the financials and blah, blah, blah" And then he has the gall to say that they can come back with questions any time and all the time the poor guy sits there with a mouth full of teeth"* **Participant J:** *"While the communication was ongoing, we sprung it on them and also sent out **mixed messages,** what came from the Group MD's camp and what came from my team, sometimes contradicted. This was not fair as it created false hope, people got hurt and of course that caused a problem. We did not communicate very well. At that point when we first let the staff know, it did not look like there were going to be any casualties. But it ended up that there were casualties, we didn't do it well"*

Central themes	Sub themes	Words / phrases (direct speech)
Procedural experiences	**Perceptions of unfairness: Interactional justice (Dignified & respectful treatment)**	**Participant A:** *"You offer them options of being transferred, but there's fair play and the there's not fair play. There are people who are offered jobs that are not something that they're going to take up, so they don't really have a choice but to take the retrenchment"* **Participant C:** *"Because they wanted to do it so quickly, in and out, done, they just cut 50% of the workforce. From one day to the next, 100 people were left without jobs"* **Participant F:** *"A guy had been recruited from a stable job, only to be retrenched a year later. This man had responsibilities and a family. Here was a white, male, age 45plus and only because he clashed with the CEO, he got booted, with only three months salary"* **Participant J**: *"The designer who we let go, I was very close to. I have not seen or spoken to her since then. She knows it wasn't me, but she went to a lawyer and they dealt with it"* **Participant L:** *"In the factory people left with a sense of: 'we have done something wrong'. In the early retrenchments, when you got the message, you would leave immediately. We would bring their stuff to them. So it was almost like you are being*

Central themes	Sub themes	Words / phrases (direct speech)
		chased away, which is very sad.
		This week I consulted to a company, where they offered positions to people in another region. Now this is in Durban, and the Indian people are a very close-knit family and they hoped that this commuting wouldn't suit the guys. They actually just wanted to get rid of them. But it backfired on them, because they didn't take the package and are commuting and now you sit with demotivated people who have to commute every weekend and don't have the energy to focus on the job"
		Participant O: *"I don't think it was very well handled. One lady was a contractor who had worked for us for eight years, and she was pregnant about to go on maternity leave. I had to fight for her to get a package. Eventually I did. For the rest, I was young and ill equipped to deal with this. Then I didn't think so, but now if I look back, I think I would have preferred to have had an industrial psychologist to help me deal with the older people"*

Central themes	Sub themes	Words / phrases (direct speech)
Personal experiences	**Follow up systems to gauge employee welfare**	**Participant A:** *"No they kept lists, but those lists in my opinion don't work"*
		Participant C: *"In Company A, it was informal. It was a type of company, where people worked closely, formed bonds and teams and kept in touch with each other so it was a situation of hearing via the informal grapevine. People would phone in and word of mouth. In Company B the only people I heard from, where those involved in the CCMA case. Sadly, I heard some were still unemployed, still a year later. That was a bit of a shock. But there were also some success stories: one guy was the buyer, who went on to start his own business, which is very successful now"*
		Participant D: *"We keep their details for six months and tell them we will notify them of openings. The ones that are committed and phone regularly, when positions become available, I give them a call. They mostly kept in touch with me; they wanted to speak to me directly. We have a chat and see how everything's going"*
		Participant F: *"Former employees did not want to hear from us as they were too 'bitter and twisted', because of the treatment they got from this company"*
		Participant G: *"From an HR perspective, no I don't, sometimes I bump into a guy in town and say: 'how is it going?' Often people would pop in and say hi. We would keep contact, because we keep lists and phone them and say we have got this and this position. But invariably they have started their own business or have a job elsewhere"*
		Participant H: *"They would phone me and tell me how well they are doing. Sometimes they have opened very successful businesses"*
		Participant J: *"I have not spoken or seen him since"*
		Participant K: *"We kept records of the people that left. We managed to get a lot of people to come back, so that was fortunate. We kept in touch with them or they would phone us. Others built friendships through the business and kept in contact constantly, so it was like informal"*
		Participant M: *"A lot of people kept in contact after they left, but nothing formal"*
		Participant N: *"There were no formal systems. A lot of people actually came back in the follow up period. But the follow up to was more informal. I would phone*

Central themes	Sub themes	Words / phrases (direct speech)
		people that I was particularly close to or they would phone me"
		Participant Q: "*I am unaware of anything formal. I left a couple of months later and only conducted informal follow-ups with remaining staff members who retained contact with retrenchees prior to leaving"*

Central themes	Sub themes	Words / phrases (direct speech)
Personal experiences	**Organisational expectations: Legal requirements and breaking the news**	**Participant A:** "*Well, to do everything. Like the whole thing from once senior management had decided what to do. You've got to go and be the bearer of bad new: you've got to go into the union meetings, you've got to actually give feedback to the unions, to organise the consultation process, sit with the staff, do the one-on-one with retrenchments, do the paper work, you've got to make sure the steps are done, the last pay roll is done, the leave, that everything is right, ja, everything. I was involved in everything"*
		Participant C: "*I had to break the news and mange the process"*
		Participant D: "*I did the retrenchments for the company. I became the 'retrenchment man', they trusted me to do it properly, because they knew it was something I did well and there would be no comebacks"*
		Participant E: "*I was tasked with ensuring that they followed the requirements of the labour laws, that we don't end up at the CCMA and they wanted guidance on the people interactions side"*
		Participant F: "*Counselling, making sure that all the correct processes where followed, making all the problems go away and absorbing the negativity around it. Following up with consultation thereafter, communication company wide and ensuring we did not end up at the CCMA"*
		Participant G: "*To get the job done. As HR you are part of the management team that makes the decision. The operational guys would always first come to me and say: 'look we are planning this, for the following reasons, do you agree with it, do you foresee any problems, because any decision will impact people. When it comes down to individual cases, normally their line manger is involved too with the affected person and me. I then have to deal with the questions and its mostly: 'Ok, where to from here?'"*
		Participant H: "*To do it and just to get it done. It's like I would be charged with: 'this is what we want, this is what we want from the union or the person, there you go' and that is me"*
		Participant I: "*I had to make the call as to who they were going to be and then there was the first retrenchment. So there I was retrenching someone who had been there for 15 years, giving them the bad news."*
		Participant J: "*I was supposed to give input at the beginning, but what was difficult is that my input was ignored. So the group MD and I did have conflict along the way. For 3 months it was quite traumatic, I would go and sit with him and say: 'listen, you can't do this'. Then I had to break the bad news and manage the process together with HR"*
		Participant K: "*It was the first time I had been exposed to anything like that, it was hard. I had to sit with the groups and also do the one-on-ones. But by that time everyone knew that we were restructuring and that helped, also we as regional HR*

Central themes	Sub themes	Words / phrases (direct speech)
		managers were assisted by the national HR manager"
		Participant L: *"In the first processes that I was involved other then the legal stuff, I was to hand their stuff back to them and that they get off the premises quickly, because those were the days that we didn't trust people, because they could cause so much damage. In the merger process, it was more nurturing. Where one would talk to the individual and see what alternative positions there were for them to consider, find out what is there next step if they were to lose their job and try to assist with planning this journey"*
		Participant M: *"At first played more of strategic role, where we looked at what we planned to do, checked our theories and benchmarked, locally and internationally. Played a part in determining the organogram, functions, skills required, I' say it was I was responsible for process management. Then later to prepare the management team for the one-on-ones as they were to lead those interviews and that we complied with the legal requirements"*
		Participant N: *"I had to break the news of whether the applicant was successful or not"*
		Participant O: *"I had to be that advisory role to the manager to say, well, this is what we need to do. Then I had to pick up the pieces. They could come and talk to me if they wanted to. There were 2 of us in HR, the unit was basically split in 2 and more went to see her, because she was here longer than me"*
		Participant Q: *"As HR manager I had to assist in facilitating the process and educate line manager's i.t.o. their responsibilities and legal requirements. The HR department had to deal with queries, complaints, anger, etc. from both employees and their managers at all levels and from all departments"*

Central themes	Sub themes	Words / phrases (direct speech)
Personal experiences	**Role preparation**	**Participant A***: "I am sure I went through training, 'maar ek kan nie onthou nie'. I have done it so many times that it's second nature.* *I have a retrenchment plan, which I present to my client organisation. It consists of budgeting for counselling, workshops, financial advisors and the like, so that people are just better prepared"*
		Participant C: *"I didn't have a script. We had a meeting with different managers and the HR guy actually did some coaching, he just spoke about some of the possible reactions we may expect and how to deal with it and how to break the news. His approach was get it on the table and then give support and get it positive, don't let the conversation digress – he tried to paint different scenarios for you. We didn't have any printed notes as to how you should stage initial news. In company B there was nothing"*
		Participant D: *"I sort of prepared myself over a number of years, mentally, that was part of the job, because that it was I learned as part of honours at varsity. In the beginning I also had a very good mentor who guided me. I have done it so often now, it becomes easier to do"*
		Participant E: *"No I didn't get any training. The most important thing is to try and put yourself in their shoes. Later, more recent times, you just know what to do when you go in there. And if you know the individuals you also know how to approach them, people need to be approached differently. If you don't know the people its*

Central themes	Sub themes	Words / phrases (direct speech)
		more difficult. In the early days, it was really just about understanding why what was happening; you have to understand where the individual was coming from. No preparation can prepare you for that sort of thing. *I always show my clients my retrenchment plan, and I insist on it, otherwise I won't do it. I have a budget for counselling, workshops, financial advisors and so on. I also help them prepare retrenchment policies and procedures"* **Participant F:** *"No support or counselling was offered to me"* **Participant G:** *"It has become part of modern day life and second nature to me. I anticipate that it will become a reoccurrence in the future due to the changing external environment and our industry needs"* **Participant H:** *"I don't get any emotional support. But I get the help of a labour lawyer when I go into a grey area. But no, not other than: 'how is it going and how far are you and that's the extent of that. So, no, I've never had training in how to retrench and how to deal with it and how to facilitate it"* **Participant I:** *"Someone from HR sat with me and we were coached on what to say and what not to say. So from a legal point of view we were coached and we were also coached from a humane side on what that to expect'* **Participant J:** *"I had brilliant assistance from HR, who sat in with me"* **Participant K:** *"We were quite well versed and briefed by our national HR manager she was really great. She would let us call her really at any time if we were thrown with questions we couldn't answer or anything and she also gave us a break down word for word document kind of thing of what the process included, what we had to discuss, when, do what when, it was really helpful because it was really streamlined from that perspective. Because of the nature of the company previously and the whole circumstances it wasn't like you were coming in there for the first time. They almost knew it is bound to happen, also most people who were in the branches that weren't successful knew they weren't making money for a while"* **Participant M:** *"I think by my preparing the managers, where I took them through the stages of loss and recognise it for what it is, I showed them videos on how to deal with that, took them through a bit of counselling; made me think a lot about what it was going to be like. I was facilitating but also involved in the process and I suppose there is development of skills in that, besides background and being involved in HR, where you are exposed to a lot of emotions"* **Participant N:** *"I did a 2 day workshop, during 2003, when it became clear, that I was going to be involved in retrenching people. Two people came here and held the workshops and we did case studies and role-plays. We focused on the legal stuff and the emotional side. We had the opportunity to ask questions, get a few tips and hints on how to tackle the job ahead of us. We talked a lot about the emotional curve and trauma. We were also offered psychological counselling if we needed it"* **Participant O:** *"No there wasn't any emotional assistance or preparation for me. It was a difficult situation for me, because I was quite a bit younger at that stage and the people in the company were much older. They've been there for 20 years. Some of them 30 years. And then 30 years old is quite young when someone is nearly 50 and you've been given the 'message', and now you've come to someone for support could be your daughter"* **Participant Q:** *"I was able to work together with a corporate legal specialist and legal department as and when required"*

Central themes	Sub themes	Words / phrases (direct speech)
Personal experiences	**Stakeholders' reactions to the news: The victims**	**Negative Reactions:** **Participant A**: *"She shouted at me and threatened me for doing my job, she thought the process was not as effective as she wanted it to be, I think it was anger and she said: 'do I know [name]?' Now [name] was a person with high 'political standing' in the company and she was basically threatening me for doing my job, by telling me she's friendly with him. I knew I wasn't doing anything wrong. It doesn't mean that you don't feel anything while they're shouting at you and threatening you. Later she came back and apologised and the situation ended up quite positive.* *I walked in on a union meeting that was going way beyond the agreed time set aside for it, which means production is standing still, which means poor performance, the union member later said to me in private: 'we wouldn't want to see you as a lady get hurt so you mustn't just walk into union meetings'"* **Participant C:** *"In Company A, I had shocked people looking at me for 5 minutes, as reality started sinking in. I also got denial reactions: 'ooh ok, that fine' and then they walk out. A day or two later they would come and talk to me about details, how they feeling, how the wife's doing. In Company B, there was a lot of anger on the shop floor, but in my department, we were a bunch of engineers, there was a more 'mature processing' of things"* **Participant D:** *"Initially we would fight and fight and they would blame me. I think there would be bitterness, everybody feels as if they have done much more for the company than anyone else and people really feel that the company owes them. Later on, on the last day when you give them their severance pay, final letters, provident fund papers and UIF forms and they would see that everything is now finalised, then we shake hands and off they go"* **Participant E:** *"The first route is panic, how's it going to affect me? Once the message was finally broken, you would have grown men bawling their eyes out across the table from you, it's incredibly difficult. In another case I had another coming in and swearing at me and using the filthiest language you've ever heard and not actually being able to interact with you for a long time afterwards because they are ashamed of their reaction and behaviour. A lot of people offloading on me about the 'bloody' company this and the 'damn' company that and how dare they and if they done what I told them to do 5 years ago this would never, you know, so blame, blame, blame. There were lots of question, because they don't hear you in the first few minutes, you have to repeat yourself, until it finally sinks in"* **Participant F:** *"They are bitter. Angry,* that's *why you become the buffer and generally they lash out. They tended to refer to 'them', senior management as the 3rd person. The fact is they are very angry and it comes back to you every time at HR. Others get angry and take it out on you, they actually shout and scream and whatever"* **Participant H:** *"Initially they start crying, they're shocked or they're angry. Most people want to know exactly what's happening and why. So they want information. And then they take it out of here and then they can work with it. Ja, I would say 80% of the people want to understand why and what's happening. And why we are doing this. Some people have been expecting it. Sometimes they could see these guys are buying a spanking new machine and how is it going to affect me, what does it mean to me"* **Participant I:** *"He was shocked, but I think deep down he perhaps expected it, he didn't say anything when I asked if he had anything to say. Another woman just sobbed and sobbed and sobbed"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant J: *"One was very angry with me. She was re-employed, but still won't talk to me. For me it's problematic. She will not trust me for a very long time. Another burst into tears and really got hysterical. Another was furious and wanted to know why and she screamed: 'how dare you!' she cracked up, really lost it and cried"* **Participant K:** *"Some people took it personally; they thought they were being targeted. There was lots of questioning about: 'where do we go from here? And I had to explain quite a few times over and over' Some were fine about it, others burst into tears and would be quite upset, because even though we had lots of communication beforehand, I think the reality of it made it a very different story"* **Participant L:** *"In the early days we had little incidents of let's say 'sabotage'. Another example was, that year, like every year we would have wage negotiations, it normally was something to look forward to, like an event, where we would fight a little bit and maybe have a one-day strike, but that time things got ugly. People were hurt, they were bitter; they blamed me. Some of them verbally attacking the organisation and me. They swear at you. One guy threw stuff at another manger in his office. Some said: 'do you know my situation at home?' and say things to make you feel bad in what you are doing to them. I had one guy who phoned me and said: 'I don't want to talk to you, just send my letter and other stuff to me'* *In the merge process, very much an: 'us against them' scenario between the 2 'old companies', people felt discriminated against, especially during the selection process. But overall it was a more constructive process, because people had time to think about alternatives and at the end those that we had to finally tell, had by then already made alternative arrangements"* **Participant M:** *"Some where surprised that it was them"* **Participant N:** *"Some were quite nasty and negative and called me names. I had a very disturbing incident; one of the line managers was a chap I worked with in Natal, when we've run operations up there. He came back, down here, just after I did, in 1996, I think. So, I knew this guy quite well. He's been working for me in that particular time. And he came to me, just after the announcements were made and he asked me: 'tell me, am I in or out? A lot of people actually did that and I said: 'well, I can't tell you. It's got to go through the processes' And he said: 'ah come on, come on, tell me, am I in or out?' And because I didn't give him a positive:, ' ja, you're in', so I think he assumed that he was out. And off course, he never had the opportunity of going through the process, because he took his motorbike and killed himself on OuKaapseWeg, 2 days later. He had another staff member on the back, the 2 of them were killed instantly and I thought: 'well, he probably wouldn't have done that, if it weren't for this process'* *As to the others, some had to show another guy this is how we do this part of the job and he would sit next to him and learn it by looking over the shoulder. I don't think the retrenchees showed everything to the survivors. Some were deliberately unhelpful, which was fine. You know, if somebody was being deliberately obstructive or damaging, I asked that person to leave immediately. It's not good for everybody else if you've got one person whose really out to upset things"* **Participant O:** *"When we first broke the news in the group meeting, it was very quiet, there was no discussion. People just went back to their desks and then a couple of days later, the questions started and a lot longer discussions. The packages were discussed and there was a lot more positivity. In the one-on-ones, it varied, depending on personal circumstances, I think. Some were shocked"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant Q: *"There was a lot of anger from management and staff alike: 'this organisation does not care for its people' Some members of the senior management team were directly 'blamed' for the retrenchment and HR was blamed by the odd few for 'not standing up for the people'"*
		Positive Reactions:
		Participant E: *"I would pretty much say it's in the majority have been better off with the experience. Sometimes you land up retrenching people who have become deadwood in the organisation. And it actually sometimes boots those people out and gives them a wake-up call and its amazing how many people stared new business, got better positions in companies, its just amazing how many good things came from that"*
		Participant G: *"People looked forward to starting their own thing, they may be very successful and then have something for their kids to inherit. Because of the clear communication processes leading up to the final retrenchment decision and in my view because of the sophistication level of employees in banking, employees tended not to apportion blame"*
		Participant N: *"Some were positive and fairly upbeat, I think because they had opportunity to contribute and people saw that"*
	Stakeholders' reactions to the news: The survivors	**Negative Reactions:**
		Participant A: *"Terrible, the morale would dip, the people feel threatened and they feel unsafe, because they're less secure. They had to take jobs that they didn't want, often without an increase. It's not good they see their colleagues go through a bad time and they feel for their colleagues"*
		Participant C: *"Morale and motivation dipped tremendously after that in Company A. A lot of people were angry and resented the company afterwards, they also felt guilt, why not me? ... Performance was not fantastic: You had a department with six and you took two out, suddenly people have additional tasks to do so performance takes a dip, because people are trying to find their feet and find out how to do things more efficiently"*
		Participant D: *"Relief, because they knew it could have been them. There is no real jubilation that they were not sent"*
		Participant E: *"Guilt, horrendous guilt. I have got my job but my friend is gone. Sjoe, I still got my job, what a relief and all the rest of it, but very much stronger was the guilt, especially initially. ... Definitely a drop in performance you know it's like a black cloud that settles over the whole organisation. And it's always been the case in the various retrenchments I have been involved in. And it goes on for months"*
		Participant F: *"It had a huge demoralising affect. I ran a climate survey before and after and there where huge disparities. It left a lot of insecurity amongst those that were left behind. Allot of them lost friends in the process. There was a drop in performance and morale: we have a pub downstairs, previously it was frequented late on a Friday afternoon, lots of fun, a vibe and used for team building, not after though. So this and the climate survey were huge indicators to me. Just the general morale: when you listen around, comments people make like 'I'd better not speak up or I will be cut like dead wood'. There might have been one or two who had a sense of guilt, because they related well to the CEO as opposed to really being gainfully employed"*
		Participant G: *"I think they feel sorry, but that said, we haven't had a lot of forced*

Central themes	Sub themes	Words / phrases (direct speech)
		retrenchments in the banking industry"
		Participant H: *"Morale and motivation drops like nothing during that period, so I don't even try to do anything like training or development in that time. When we are in retrenchments and it is normally for a year period, your employees give you what they have to, they are not motivated, they are scared, and they don't trust you. So managers just manage creatively and get out of them what they can and try to keep them focused. I think they are very emotional, and if they are not directly affected, at least somebody that they have worked with for 20 years have been affected. So they take it very personally and it is very difficult to manage. But I think it also helps that it has become part of a corporate culture or the industry culture with retrenchments happening. Ja, people in the back of their mind expects it all the time"*
		Participant I: *"I think they were anxious of the unknown. I got feedback; it was actually very negative. I was the new manager who came in and I did this horrible deed and then went off and had a baby and when I came back from maternity leave, it was actually a worse situation than when I left, because they'd been able to stew on it and I was like the 'baddy' in the situation. It took me at least 2 years if not more to get the culture right and the team morale. I did not know what the productivity was like prior to this, as I did not work here before, so no great shakes I would not say bad; it was just fine. I think the main problem was the culture and the acceptance of what happened to your friend and accepting me as your manager and trying to understand what I had to do, but rather just blaming me"*
		Participant J: *"Some did blame me and some not. Lower down on the ladder, some don't understand and I don't think they have the emotional ability to understand. It created huge mistrust, there still is. There was a drop in productivity and increase in absenteeism. We ran workshops afterwards for the whole division. We divided into 30/40 at a time over 2 days and we wrote everything out. Now we have the good and the bad and we know how everybody feels. They have been able to express themselves and they wanted more inclusion. They said that when they see the HR guy coming, they see retrenchment. It's still very sore. They mistrusted us and chaos was created basically. I think that goes with any change, but its how you deal with it and we should have had someone help us with this change"*
		Participant K: *"Because they knew that we were doing it department by department kind of thing, they were just waiting their turn to hear. There was definitely a bit of a morale drop, I think it had to do with the uncertainty"*
		Participant L: *"The guys that stayed in this organisation that I am busy with now are not motivated and because they have to commute every week, they don't have the energy to focus on their work.*
		In the merge, some who couldn't adjust to the new culture, decision-making style etc, they resigned, because for them it wasn't a friendly environment. Some have the ability to adapt and say: 'ok, let me just ride this out', others did not have the ability to adapt.
		In the factory because things became nasty, we had police and security etc there. From an HR perspective any new thing we wanted to implement, they resisted. We tried 'green areas, quality circles etc', those things just never took off, people would just sit there and not participate, they were disillusioned, distrustful and disenchanted. I don't think it was so much a drop in productivity; it was more a drop in enthusiasm and trust. We always had a problem with absenteeism, but then we had a situation of 'presenteeism', people are there but they are not there. We provided them with opportunities, but they were not prepared to take it. A kind of cynicism. We used to have long service awards and parties, we would get jazz artists in and we would take every one out. But that year, people just took their meat and went home. Some felt relief, but mostly anger and blame and the sad thing it was

Central themes	Sub themes	Words / phrases (direct speech)
		directed at you, but it was the shareholders who made the decision" **Participant M:** *"Yes the survivor syndrome, yes it does, we have a knock on effect, where we have people leaving us a while after that. Patching up culture and values, getting people to feel at ease again to talk, to feel trust and trusted and one of the reasons I don't think we should talk too early, is because when we go into the process they put their CV's out onto the market, when we have gone through it, they think: 'phew, my job is safe, I am valued, I'm wanted' but they don't take their CV's off the market, so what we do find is six months later they get a call from an agency saying, remember six months ago you've put a CV out with us, I have a great opportunity for you, and we lose people like that. Many of them will come in and genuinely say: ' when we went into the thing I thought oooh hang on I better get my CV out' and then 'I have not been looking and suddenly the agency phoned' and then they go"* **Participant N:** *"It was It was quite a stressful period for everybody involved. We suddenly had a more difficult job to do. We would, literally be working harder; there'll be longer hours, and a lot of pressure on us. New things, more things, we would be doing more, with less and we all knew that it wasn't going to be easy from here on in. There was definitely a drop in performance, linked to the reduction in numbers and not all the jobs being covered adequately.* *And then the people, the people started to disappear. All didn't leave at the same time, it was kind of over a six month period, where they were drifting away and that whole period was hard and probably the main topic of conversation was: 'who's is it going to be at the end of this month'* *Some felt guilty that they hadn't been retrenched. Some of the survivors were envious of the packages; some were quite substantial. There were some big numbers flying around.* *After the 3rd wave of retrenchments morale and performance dropped. We struggled with absenteeism, it used to be around 6-7% and now it is almost double that"* **Participant O:** *"In that 3 months until we finally closed down, productivity dropped, people went out for drinks a lot more and didn't bother coming back. So they lost respect, I suppose for their employer. It was in any case a very loosely managed branch, so they took advantage of that. It was very much: 'what are we still doing here, why should we still be here? Just give me my money, I want to go'. Very much a case of" 'couldn't wait to get out of there'"* **Participant Q:** *"Survivors were demoralised and overworked. Some believed that the wrong people were retrenched. Some felt guilty and could not understand why they had remained and others were gone. Many feared a further retrenchment, as they believed that not all of the original problems had been addressed. Others were elated that they were still there"* **Positive Reactions:** **Participant E:** *"A year down the track I would say they all pretty much got over it, moved on, there are exciting new projects they are getting involved on"* **Participant C:** *"From a management perspective, we did a lot of team building, because of restructuring teams and half the team is now gone. But not impossible, because you can turn a situation like that around very quickly. It took about three months to get morale back"* **Participant G:** *"Performance will normally pick up, because they know if we don't all pull together and make a success of this job, not one of us will have a job"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant K: *"People also focused on the opportunities that existed in the new brand, so that helped a heck of a lot. I also had good relationships with people, and they knew I wasn't going to tell them anything else than the truth and do anything I could to help them"* We *were prepared to all not work for a salary and simply to stay operational (before the new owners took over). I get goose bumps when I think back, we heard from the banks that there was a possibility that we could not pay salaries that month, but everyone was prepared to jump in, we divided ourselves up to go and run the branches, got up early in the morning and not one person had a problem with that, we just did it"* **Participant O:** *"There was some excitement too, to get out of this gloomy place and start your own thing"*
	Stakeholders' reactions to the news: The implementers	**Participant A:** *"You obviously worry about yourself. How would it affect me? You also know that problems might open up opportunities for you, which is good news. Um you go through a range of emotions"* **Participant C:** *"When you hear the "R" word, the first thing you think about is yourself, self preservation, its human nature. Also I was concerned about my team and the impact it was going to have on them, and then for the business...I just wanted to run away and I still feel that way today"* **Participant D**: *"I always say that management has to wait for me to retrench everybody else first before they retrench me because there will not be anybody else to do the job. My goal is to make my position indispensable. As long as I do that, they won't touch me, I am quite secure in that. With the merge the only section in the company that people were employed in was HR. We boosted the HR department; we made it bigger. The MD made it very clear in our first joint meeting, he said: 'you guys must remember, we do not unnecessarily cut, but we restructured the whole company to make it smaller and a bit more streamlined, but we build the fat into the HR department, because there is a big focus especially as far as the training is concerned'. The more people the more problems, so there will always be a job. It is such a labour intensive industry and business that you need the specialists"* **Participant E:** *"I had mixed feelings, I mean it's a huge challenge, it's a new project, there is a huge amount of excitement in that and part of the challenge was how do I get these people to go with their dignity in place"* **Participant F:** *"I was in shock. I felt awful. I had to remain neutral. I don't particularly enjoy telling people that their livelihood is being cut short. I did not worry about my own job though. I do know that I am not irreplaceable, but I think the CEO realises I am invaluable"* **Participant G:** *"Every single time we do a restructure, then I pick up the phone and ask the head of HR: 'tell me upfront is the HR function going to be restructured or not?' If he says: 'yes', then you say: 'well, my position might change' but I think with any restructure, your position does change because you now have different areas you are looking after. Your job continuously changes in any case. With the last restructure, in my case, I took an alternate position, because I would rather have a job. The net effect was that I moved 15 years back in terms of what I am doing, because I wasn't prepared to relocate, but my salary remained the same"* **Participant H:** *"Even I have come to expect it. I can be approached tomorrow. And they say: 'look, it has been lekker, maar it is now finished'. You know and it is sort of ja, ok fine, if that is how they feel, then that's how it is. Ja I think it does become part of your reality. It is sad but true"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant I: *"From my point of view, I knew I wasn't going to be affected because I had to actually do the deed, so it's a different kind of angst that you feel, because you actually have to do it"* **Participant J:** *"I just dreaded the time"* **Participant K:** *"At first we were shocked when we heard that we were going into liquidation, I mean it was quite frantic. Then once the new owners took over and we started the process I often joked, that I was going to be retrenching everyone and then I would be last in line. I used to tell my boss that that wasn't so good in a way as we were going department by department and people were waiting to hear. It also opened my eyes to my comfort zone and for the first time I started questioning me and my future and then you realise that you are just a number actually and even though we have a 'family feeling' here, at the end of the day it's about the business and that is the hardest part"* **Participant L:** *"In my younger days, with the first retrenchment, I found it challenging at first, because this is something new, you are selfish then and it's very much about your career and new experiences. Then you witness the emotion and things and you go into the 2nd one with trepidation and a sense of dread and lets just get this over with quickly* *With the merge, I took the package, because over the past few years I had been looking for opportunities and was told I was a white male with not much prospect, so I took the package and now I consult back to them. What was traumatic for me was the daunting time of starting my own consultancy"* **Participant N:** *"When the notice went out, I didn't know if I was going to be retrenched. We had to apply for positions. There were seven of us and only place for three and that was tough. After three weeks, we were told. Fortunately I was one of the one1 out of five and I had one other person in mind and I thought he would get the job. And in my mind, it was between him and me and I thought he would get it over me. I was quite pleased with my selection. But then when I saw this other chap come to me and shake my hand and he said: 'look we're going to have a few meetings and let me show you how this operates and this department works. He was so generous with that, that made me feel guilty again"* **Participant O:** *"It was not a surprise to me, I knew it was coming. The strain on me was more the people who were unsure about their futures. I never thought I would not get another job, but I did struggle for two years to get another job in HR, specifically. I immediately started thinking about my expenses, bond etc, I also knew that at that stage to find a job in HR would maybe be difficult, because there was a lot of affirmative action in that time, especially in HR. I also knew I am the kind of person that makes things happen, so I did other work, until I got back into HR"* **Participant Q:** *"I left the organisation two months later and it was treated as a retrenchment. I was disillusioned with the status quo and management style and clashed with my director on a number of issues. I considered my options and handed in a letter of resignation. It was deemed inappropriate for me to leave under a cloud so short on the heels of the retrenchment and so I was offered a retrenchment. Moralistically I considered rejecting the offer but common sense prevailed i.t.o. how easily I would secure another job and so I accepted the package. Retrenchment is not just a 'blue collar' reality. It could affect my future prospects too. It is important that we all have a plan B in the event of retrenchment which includes flexible and portable skills and competences, above average presentation skills to enable 'selling yourself' to prospective employers and an extra large dollop of self confidence to sometimes just jump in at the deep end!"*

Central themes	Sub themes	Words / phrases (direct speech)

Central themes	Sub themes	Words / phrases (direct speech)
Personal experiences	**Guilt feelings and sense of responsibility**	**Participant A:** *"I would have feelings of guilt if I felt the company wasn't treating somebody fairly. If they were gunning for someone and I knew it. I had to go and do the dirty work to make sure the paper work was in, that would make me feel dishonest. Honesty is important to me. I would have like conflict there. I would feel truly sorry for people, simply because they don't have the ability and I would think where in the world are you going to find a job? But I did not feel responsible for their futures"* **Participant C:** *"I think you feel a slight twinge of guilt and that you have let people down. I don't think it went as far as responsibility. Difficult when you personally knew the guy, his wife and kids and you felt concern for them. I do take on responsibility and let them know that I was involved in selection process. I think you get more respect that way"* **Participant D:** *"They bring in the money; we are here because of them, not the other way round. So there was a little bit of guilt but I cannot afford in this profession to be too emotionally involved, because I know I am going to do it properly. And what makes this difficult is because it is a no fault dismissal so the guy had absolutely nothing to do with it"* **Participant E:** *"Mixed feelings, I definitely felt a sense of responsibility and it's: 'what am I not thinking about that could help the situation or reduce the situation, how could we do more'. I felt a sense of guilt definitely, if I think back now, in those early days, there was so much more I could have done. There was one chap, same age as my husband, his wife was my age, I met them and I got to know them, their kids where my kids ages, he just bought a new house, just signed for the bond and 3 days later we told him he's going to be retrenched.* *I mean it was just, you know, where's the sense of fiddling with peoples lives like that? And then particularly there where a lot of people who I grown to be friends with and work with closely on a day to day basis. And if you know the individuals you also know how to approach them, people need to be approached differently. If you don't know the people it's more difficult"* **Participant F:** *"I felt guilt because I did not see this coming or I was overseas when I should have been here, That I could not find them a job, that I am still here, that they've got children, all those kinds of thing"* **Participant G:** *"I never ever felt guilty, I never allowed myself to feel guilty. If it is done with 120% integrity. In the beginning, years back in mining, it was difficult, but that had more to do with the integrity of the process and whether they were trying to get rid of someone. Now in banking, because of the things we have in place and the way it's done, it is different. It is only in exceptional circumstance that I would sit and worry further, but then my wife tells me I am a 'cold, clinical bastard', but I think for me it's just a part of your make-up"* **Participant H:** *"At first I felt guilty. The first 2-3 years it was very hard. Someone would come in with a baby on their hips, I looked at it and ask myself: 'what are you doing' Then I thought: 'look it's just a reaction; you have no reason to feel guilty'. I think you are directly responsible for changing someone's life course. You are an instrument and that is quite heavy and a huge responsibility"* **Participant I:** *"It's the hardest thing I had to do. I don't think it gets easier, people thinks it gets easier. I felt as bad with the last one as I did with the first one. I think*

Central themes	Sub themes	Words / phrases (direct speech)
		you just become better in the way that you do it. It was very hard" **Participant J:** *"Guilt. Basically I was responsible for people losing their dignity and respect. It was the way we did it too that bothered me. I think I took it badly, because I felt, ultimately as the boss, they looked to me as if I was the one that did it"* **Participant K:** *"It was difficult because to sit across from someone that had been working with for 5 years who you actually employed and you know them and their family well and their circumstances. You felt like you had failed in some ways, you didn't do enough as HR, you feel responsible, because you had employed these people, you had helped build the structures of the business. Could I have done something differently or better?"* **Participant L:** *"I didn't feel a sense of guilt as much as I felt a sense of powerlessness and a sense of cynicism, because you went into HR, knowing you wanted to help people and now you end up hurting people. You go into business as HR because you want to make a difference and you are not, so I think it was the killing of a dream, which was one of the key drivers to move out of HR, into training and development. You realise that business is in this for bottom line, that's it"* **Participant M:** *"No feeling of guilt, 9/10 times it's about making sure that we have done the right thing the right way. And that we are doing everything we can. Also a huge feeling of responsibility for the person and for the company"* **Participant N:** *"The hardest part for me was telling my friends, that they were out of work.* *When I heard that I had the job and the guy came over and shook my hand; that made me feel guilty again.* *The guy, who got killed, with his colleague in the motorbike accident that, affected me quite a lot. I felt a bit of guilt, because I thought maybe, had I given him a different answer to his question, maybe he wouldn't have done that"*
	Decreased emotional wellbeing	**Participant A:** *"I gained a lot of weight; I ate my way through the tension. I would go to the tuck shop and buy myself a treat. I had heart palpitations, due to the stress"* **Participant C:** *"I had sleepless nights. Today I still bear grudges towards Company B"* **Participant D:** *"I don't have sleepless nights anymore, in the beginning I did. Don't know why, maybe because I was young and I had to retrench people older than me. I was not married then, they were, they have children and other responsibilities, I tried to put myself in their shoes"* **Participant E:** *"I can't tell you how much sleep I lost worrying about people, what they were going to do. And then you wake up 3am in the morning and the mind tick, tick, tick and you've got your day job, you still got your kids and your family and their needs. I definitely had emotional injury. I had to take three months off for posttraumatic stress; they called it a nervous breakdown then"* **Participant F:** *"Emotional exhaustion, the HR role must be one of the most taxing. I experienced burnout, fatigue, and stress "* **Participant G:** *"It is exhausting, because you go through 10 or 12 interviews a day for two or three weeks in a row, but if you don't you probably going to end up*

Central themes	Sub themes	Words / phrases (direct speech)
		making worse decisions"
		Participant H: *"Emotionally, I was a nervous wreck, but you would never say so if you looked at me. I was fearful of not knowing what I am doing. Afterwards I felt relieved because it was done"*
		Participant J: *"I did not sleep for weeks. My burnout came now, nine months afterwards. The reality just set in and for two weeks I was really low and I couldn't make decisions. So I would just sit and everything was just: 'no'"*
		Participant K: *"I don't sleep well in any case and I remember being really exhausted at times, physically and emotionally. You were constantly being sucked into this negative energy as opposed to the positive stuff of your job and that was some of the hardest part"*
		Participant L: *"Yes I lost sleep; in fact you just don't go to sleep. This was so emotionally draining"*
		Participant M: *"Lack of sleep, lack of appetite, all the classic stress things"*
		Participant N: *"Before I knew that I had a job, I didn't sleep well; I woke up sweating and worrying. It's horrible. I used my wife's' sleeping tablets, now and again, just something to relax me and help me through the night. But that has started a habit now that I can't get out of. I wake up a hell of a lot. I probably have an average of four hours sleep a night now. Now, three years later, I still worry about the company and month to month we look at the results and I think: 'oh gosh, it hasn't been a very a good month and that worries me"*
		Participant O: *"I did get a bit depressed, myself and overwhelmed by the whole thing"*
		Participant Q: *"Breaking the bad news was the role of the line managers. I did not have to retrench in the HR department. We had to deal with all the 'fall out' which made me feel sad, frustrated and exhausted. I did not sleep well, was exhausted and in a bad mood at home"*
	Role overload	**Participant A:** *"It's not nice; I found it professionally and personally very demanding. I was in charge of the head office with 300 people, I had to do the whole HR function without a secretary and I was in charge of psychological services countrywide and the clinics. And I was in charge of alcohol abuse. And I was one person and I was recruiting a new head office. I had to interview every single person. And I had very tight deadlines. And I had to leave at half past four, as I had to pick my 2-year-old up. I was too proud to drop the ball. It's not in my nature, because that would reflect badly on me so I would try and work hard and fast and more and quicker. I wasn't prepared to let my people suffer"*
		Participant D: *"I didn't experience overloading, I have prepared my whole life for this, it's part of the job"*
		Participant E: *"I experienced role overload when I would just shout at everyone and then ask myself: 'who is that?' I didn't recognise myself. Normal job still has to happen, life goes on, you still have everything else to do, a full day's work and you are trying to do this horrendous thing"*
		Participant F: *"There is just so much to do"*
		Participant G: *"From an HR point of view, you work your ass off, you are very busy"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant K: *"I remember there were times that I didn't know if I was coming or going. You were still required to do the rest of your job and this retrenchment was hugely time consuming"* **Participant L:** *"You keep busy and occupied, because you don't want to deal with this"* **Participant M:** *"Yes, absolutely massive. I probably work a longer than average day anyway but ja I would easily be working a 14 hour day. It's also a time to rely on the rest of the team which is difficult because there's been times I've gone in where I had new teams working for me and that has been quite difficult because you don't know whether everyone is able, so there's been a situation, I am doing this, and I'll do this and that and I'll have to this and then take some of it home and do that. And that's a very big overload"* **Participant N:** *"Ja, very much so. It was long hours; you know the day-to-day stuff still had to happen. The days were just full, full"* **Participant O:** *"You start getting stuck in and after a while you start carrying the load for them. I got to a stage, where I thought: 'I just have to get out of here'."* **Participant Q:** *"I had to carry on with the normal day-to-day HR activities and the field problems associated with the retrenchment"*
	Role conflict	**Participant A:** *"The day my dad passed away I thought you know what; I am being a bad mom, I am being a bad wife, and I'm being a bad worker for what? I resigned and then it was 'ooh how could you? We never thought you were going to resign, it was such a surprise'. I mean even the girl who came after me had an emotional break down"* **Participant E:** *"The family don't have a cooking clue what you are going through, and as helpful as they try to be they completely outside of that orb and they have their needs and you've got school kids and all they know is that they are being neglected, you are bad tempered, Sjoe there's a huge conflict here. Your leave gets cancelled at the 11th hour, your husband is not happy about that there's all sorts of emotional stress at home. I think there was quite a toll on the kids over those years. I was never available, and when you're involved in this you're working extensive hours. Because now you're also involved in drafting letters, they've got to be legally compliant. Have got to come over in a nice tone, they've got to be firm. Its trying to balance all these myriad of things that your trying to do so you work late into the hours"* **Participant F:** *"Quite radically affected family life, because it was energy draining"* **Participant G:** *"From a personal point of view, I actually make it a conscious decision not to take work home"* **Participant H:** *"Well, my marriage broke up as a result. I became emotionally absent for my husband. My husband said to me: 'you don't need me. I haven't felt like you needed me the last couple of years. I was making all the decisions in the house. And I realised it came from my job. I saw that if you were going to get anywhere in this company and be one of the 'boys', this is how you make it, this is how you have to behave. And they saw that I did it well. Now they accept me. Now they respect my opinion and listen to me"* **Participant J:** *"It got really strained at home for the whole time this thing was*

Central themes	Sub themes	Words / phrases (direct speech)
		going on and it really got to me"
		Participant K: *"I worked long hours, but I used to anyway, because I loved my job"*
		Participant L: *"You go home and you have nothing left to give. You have no capacity to deal with your spouses emotional needs"*
		Participant M: *"No I did not talk about it at home. I guess to buffer them. Work is work. I think they where probably quite relived that I did not talk about it: 'Ag dad, tough day' (laughs), When I go home I'll say to my wife: 'It's pretty crappy right now, were going through this and its tough, really its tough and today I have been faced with some real emotions' So when I say I don't speak about it, its more a matter of, be aware this is happening in my life and that it's a bit tough so if I am exhausted when I come home or I just can't deal with another emotional issue because I am just 'out' I am not even going to make a decision on what we want for supper, because I made enough decisions today. If you want to tell me about your shopping trip I may not be there a 100%. Just understand that that's why. When I say 'make sure things are Ok at home base', its because at work there's no one I can go to and say well this is what I am feeling because I am the one they are coming to, so that home base becomes very important.*
		My wife responds with empathy. I think she knows she can't say much to make it go away, she realises there's more of an onus on her to make sure things are Ok at home. I think the sense of isolation comes more from me from internal, in my case anyway. Because if you get into a situation of intense one-on-one and it is intense, and where are they now and how do we facilitate through that and then, right we had 3 of those and a quick meeting at lunch time; where are we in the process, how are you guys feeling, fine, ok you are all ok, fine, boom, and its very, very intense, then to come home and to have an intense one-on-one; that is just a no go. The result being I would come home quite emotionally drained, my wife and kids may see that and say: 'well he needs space'. So if there's distance it's more me than them withdrawing and also I guess my tolerance for things being at lower ebb. And going through that and then the guilt of it because my daughter would come and say 'dad, dad, I did this project at school' and me say 'that's very nice dear' and then 2 days later think she was actually wanting to show me her project and I did not give her the space. 'Oh no, I'm a bad dad' (laughing)"
		Participant N: *"That wasn't too bad, because I told my wife that retrenchments were happening and it could affect us. The family were quite glad that I was selected in and relieved that at least now the pressure was off me. So, she understood. I described the job that I now had to do for a few months. She were supportive"*
		Participant Q: *"I was working late nights and bringing problems home"*
	Isolation	**Participant A:** *"It's a very lonely job, HR is like the 'dominee on site' you know all the 'skandes', but you can't talk to someone. Your boss doesn't really care; you must just make it work. There was no insight…the day I resigned my dad died and they didn't phone me to say they were sorry. And the day I resigned they said to me, you know you should have spoken to us. I said: I wrote you three memos to say I need help. And they didn't acknowledge it… It felt like nobody cared about what you were going through"*
		Participant C: *"In company B, there was no support. The HR person was involved but she probably took more strain than what the rest of the management team did. How can you go and lean on someone that is taking more strain than you are? So the management team supported each other "*
		Participant D: *"I spoke to my dad"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant E: *"Patches. Especially when we spoke about money issues, all of a sudden shutters would come down and you would feel a little pushed away by the staff, not from management though. Some of the staff nicknamed me 'the lynch lady', that made me feel hurt and lonely"* **Participant F:** *"With time I became resigned to the way we operate, because to try and fight someone in a position of power was pointless. When I told the CEO how I felt, he told me I was insubordinate and had a job to do and I must do it"* **Participant G:** *"I am part of the management team that makes the decision"* **Participant H:** *"I've never felt the need to talk to somebody about my emotions, but that's more, it's more my own kind of personality. I sort of go through things on my own.* *I don't know if it is like that with HR people too, but nobody looks after you"* **Participant I:** *"My staff was not realising how hard it's been for me to do what I had to do. They did not see that what had done had helped them in fact. I think often there is not an appreciation for what you are going through at the same time as what they going through"* **Participant J:** *"I had brilliant support from HR and from one of the group directors, we talk a lot. But from the group MD, he just said I am overreacting, because I don't like what he is doing"* **Participant K:** *"I remember coming home and I'd really be emotional and I felt like my partner didn't truly understand the circumstances. I couldn't really speak to him, but I think I also just kept it to myself and shut him off; I got caught up in my own world. I have girlfriends, especially one particular person I could talk to about anything and that helped a lot. At work I had colleagues who were going through the same, so we could talk to each other"* **Participant L:** *"And before you know it becomes your 'life's position', you experience emotional hurt and start to close doors and once you have closed them, you not going to open them without professional help. So it had a lasting impact, it's a life changing experience"* **Participant M:** *"Big time (Laughs). I enjoy talking to people and interacting with them. This last restructuring I came into the company in order to take them through the process and there was this strange face on the floor and then retrenchments starts happening. Since then there has been a couple of cases where we had meetings that led to retrenchments. It got to a stage, where if I walk down the corridor, if I step into the corridor, it was full, by the time I got to the other end it was empty, people will just disappear: 'I don't want to be in [name] sight because if he sees me' You know there was that and to a degree that still exists. We just had a session now, 3 weeks ago, you know I was saying we broke this big unit into 4 separate units, and the common thing that came out of there, we where talking about how you feel and they would say 'If you see [name] coming, and we think there's going to be job losses'. And I was saying: 'Well I feel that quite intensely, because I walk down the corridor and that's my experience of it, so it's quite interesting' That is about 6 months after the last retrenchment. It just goes contrary to everything I believe in. It probably hurts quite a lot. Also a lot of the management team that I was in I always had to be the one facilitating the process therefore I had to be the strong one and I had to be the one that people would come and offload to. And there would be 'snot and trane: aheaa that did not go well' and going through the supporting them and that was quite an interesting thing to go through. Sometimes*

Central themes	Sub themes	Words / phrases (direct speech)
		you need HR for HR and that can be a bit of a lonely time to be in"
		Participant N: *"HR was supportive in as much as, they will probably know the legal requirements better than what I did. I was dealing with the operational issues and some emotional issues. The HR generalist will say: 'you've got to include this in you're communication, you've got to offer them alternatives, you've got to make sure that you include that'. So they were, they were making sure that we stuck to the rules, and that was their main, from what I could see, that was their main function"*
		Participant O: *"I didn't talk to anyone at work about it. At home I used to take it home and had a few discussions at home. I did not discuss it very much, though. My day was consumed with it eventually and I did not want to think about it anymore. He did not have any advice for me either. So you pretty much pack it in the box and put it away"*
		Participant Q: "I was i*solated from both the management team and staff at times as it was impossible to keep both parties happy all of the time. The managers believed I was not firm enough and the staff believed I was not able to 'protect' them. I was disillusioned with the status quo and management style and clashed with my director on a number of issues"*
	Self perceptions	**Participant A:** *"It's a person's life and you have to care. I would feel pride, if I achieved well under difficult circumstances. I would feel good about myself and what I am capable of, how I would handle and carry myself, and the feedback I would get from people, so that would be nice, because people would say that I was nice to them, I was working for them and not for management"*
		Participant C: *"You think about them and their families. In fact 2 people at company A, said to me: 'thanks for the way you handled it, I realise how difficult it must have been for you', that was nice to get that feedback"*
		Participant D: *"I was not married then, they were, they have children and other responsibilities, I tried to put myself in their shoe. There was a matter of self pride in the process, which even cut off more of that emotional stuff for me"*
		Participant E: *"You put yourself in their shoes. I had many letters, phone calls after the fact, phone calls by family thanking me, and stuff like that. I had one colleague say: 'you must be the only I know who can fire people and still stay on their Christmas list'"*
		Participant F: *"I felt empathy, but it's very hard because the last thing that you can do is say: 'you know, I know how you feel' because you don't know how they feel"*
		Participant G: *"We don't make the decision lightly, because this is peoples lives we are dealing with. I suppose I get quite focused and clinical, when I say clinical, I can't allow an individual's lets say personal circumstances play too much of a role. But having said that, if I think back to [company name], I had lets say 2 people, same years of service, pickers, unskilled labour. One was married with a wife and kids; we knew his wife was working. The other was a single mother. We went to the first guy, told him we are going to keep the single mother because of her personal circumstances. You can only do that in very selective circumstances, it's not a general thing you do"*
		Participant H: *"If you came to see me a year or 2 ago, I'd say to you: 'life knocks you down, you stand up and you continue, you know. You don't ask why or whatever, you just say Ok well, it is part of life, it happens'. I can't understand why people dwell on their misery so much.*

Central themes	Sub themes	Words / phrases (direct speech)
		Now, I have a lot of empathy for them. I try and see if it was me in my current situation, what must they be going through, and I always try and look at it like that, but its not easy, especially if it's somebody that you really liked and you've worked with. *It was an opportunity for HR to add to the bottom-line; I was challenged by it and saw each of them as a mountain to climb. And when the agreement was signed, there was a sense of achievement when I got there. It's horrible, if you look at it that way now, but that's how I approached it, as a task. I was very task driven and had a deadline and I would say to myself: 'Ok, in a weeks time you must be here in the process' and if it didn't happen, I would manipulate the situation"* **Participant I:** *"The fact that this person was not going to have an income and concern for them and their families. With time I got better, I showed more empathy, the words I used, my tone of voice, trying to say that I can't understand, I am not in your shoes, but I am feeling for you"* **Participant J:** *"I didn't like what we were doing to them. We were playing with lives here. Some of them have been working here for years. We have had mothers and daughters working here. In the second wave, we managed to outsource the whole division. In the other division, we managed to find jobs for everyone"* **Participant K:** *"So I was really empathetic with them and yet kept the business hat on"* **Participant L:** *"I had such empathy for them, especially the people I knew well and had worked with for a long time"* **Participant M:** *"There is compassion for what the person is going through and I need to help them through, but at the same time my obligation is to the company, to make sure process is in tact. It's the tension between the two that is a fine balance. Many people keep in contact, long after they have left, which is quite a surprise for me, because you would think that there would be a lot of anger. Funny enough, once you worked through that, it hasn't been. If we hadn't done a major restructuring 6 years ago, there is no chance we would be were we are right now. Very often I have been called in to give advice to other business in the group or outside the group because what has happened is that people have gone through the process and has said: 'you know that process worked very well who's guiding the process? It's [own name], give [own name] a call'"* **Participant N:** *"Well, it could have been me. I know how I felt. I felt as if I could understand what they were going through. For those couple of weeks until I knew I was 'out' in my own mind, I was 'out'. I knew what I was going through and so I could understand. It was just the worst feeling, until I was told finally.* *I had a sense of achievement in that you have a feeling that you suddenly got a power that you didn't have before. I think I used it responsibly and I came out with a solution"* **Participant O:** *"I felt for these people, but there was nothing I could do, you get sucked into it and don't actually know what to say, because at the end of the day it's a human being you are dealing with and they have families"* **Participant Q:** *"Empathy, I know what it is like not to have an income and be unsure as to when I will find another job as I had spent a year seeking employment following the birth of my daughter"*

Central themes	Sub themes	Words / phrases (direct speech)
Personal experiences	**Coping for the conversation:** (Bargaining, cushioning, unloading, arguing, mechanistic)	**Participant A:** *"If the conversation got ugly, I would call time out and repeat that this is the road that you're running, this is how I suggest you behave, if somebody would behave like that. One guy was the most cocky, stubborn, difficult guy and I chased him out of my office one day, but he was simply unreasonable and he was probably the only person I ever chased out of my office because I was going to lose my cool with him. I just said: 'just get out now, please, I've said my bit, what the situation is. I've got nothing more to say to you on the matter'"* **Participant C:** *"I could empathise, because I was also affected and so we ended up empathising with each other"* **Participant D:** *"Because you've become so technical and academic for the moment, you go through it and make sure you don't make any mistakes, but it's still not nice"* **Participant E:** *"On a few occasions, I found myself slipping up and crying with them and then I would go and think: 'I shouldn't have done that' so I made myself aware of that. I have been retrenched, so I didn't think it was harmful to let others know that I had also been retrenched. 'So as much as you think I don't have a clue of what you are going through, because I don't have a clue of what you are going through, but I have some idea and I have also been touched by this sort of thing'. It seemed to open channels, but that is as far as you need to go. Sometimes people would ask to stay on longer to finish a project, but I would get the manager in and have a conversation around that. I would prime the manager, that they cannot be blackmailed; it's an option. Sometimes the manager would get defensive and argue with the victim, totally inappropriate and I would then call time out and tell them: 'we are here to do things nicely, not stomp on them'"* **Participant F:** *"You just sit there and you have to try and absorb and try and buffer and console. And then generally speaking they leave your office and you are left feeling really bad, awful, and empty and off they go. Eventually you go into automatic mode. With certain heart wrenching cases, I would actually cry with them. It was probably not the best thing to do"* **Participant H:** *"Look you are going to be retrenched, just accept it and move on with your life. I was really like that.* *It's a fight They are fighting for their member's work. We are fighting for the survival of the company. I am acting as HR director for the company. I came across as cold-hearted and I just went through the motions: 'lets just do it' and after a while I didn't feel emotions"* **Participant I:** *"I remember, I rehearsed the entire, what I had to say in the car driving to work. I knew the whole thing off pat. I sat him down and I just started, everything came out I did not even breath I just said 'nenenenena' and I just said the whole speech (deep breath) and then I thought now I'm finished. Meanwhile this poor guy just heard all this terrible news and I couldn't stop myself because I knew I just had to say it all and exactly what I had to say. I mean I didn't even give him a chance to interact. Afterwards [name] said to me: 'you know [name], next time you should at least breath'. I couldn't breath and on top of it, I was 4 months pregnant so I was feeling pretty sick as well, so it was terrible"* **Participant J:** *"I think I reacted quite badly. When she became hysterical, I could not look at her. I was embarrassed and eventually she came back to me two days later and she sat down and she said to me: 'The biggest let down of all this is you' So I said: 'ok, tell me why' and she said: 'because you would not look at me and that was my biggest let down' She at least had the guts to come back to me and say my problem was you would not look at me. 'If you had the guts to look at me, I would have accepted it a lot better'. You know, she was right. I said to her: 'when*

Central themes	Sub themes	Words / phrases (direct speech)
		you went hysterical, I felt so bad. You put me in a position I really did not know what to do. I did not want to look, so I looked away' and the others sort of took over from there. I really responded horrifically"
		Participant K: *"Some people would get very angry and argue and it is hard because I had to consciously keep that mind set, you know focus on the issues and sometimes it was hard, because you know that they are getting irrational. I remember the first couple of ones I had my boss sit in because I was quite nervous and I would actually make a huge mess of it. I got feedback from my boss, he wasn't very empathetic, I remember him saying: 'don't be too nice and get too involved In their circumstances'. I remember thinking: 'but I want it to be about them and not about why we are doing this'. So I had to learn from that"*
		Participant L: *"I remember I had to retrench a friend of mine. Actually we shared the same flat. We were great buddies, we went away for weekends in a group of us and I couldn't do this on my own. So I asked another mutual friend of ours who also works there: 'please just come and sit with me when we have this discussion'. So we sat down and this woman came in and she sat down and she started moving things around on the desk and she said: 'Ok, now say what you want to say'. And when she looked up, all three of us just started to cry. So we sat there and we sat there and we sat there and then she said: 'just give me the paper' and she walked out"*
		Participant O: *"I did not have to break the news myself, the Regional HR manager did, but I remember one case, it was a lady employee. I just went straight to business and did not beat about the bush. Especially because she was pregnant and that was quite hard for me. In another case, a grown man just burst into tears in front of me, I felt like I am not equipped to deal with this. He had daughters my age. I tried to be upfront with him; I just said that I didn't have any hidden agendas and that I didn't have any answers for him. At that stage I just wanted to get out of there"*
		Participant Q: *"Breaking the bad news was the role of the line managers. I did not have to retrench in the HR department. We had to deal with all the 'fall out' which made me feel sad, frustrated and exhausted"*
	Coping for the conversation: Rationalised/ justified	**Participant A:** *"This is a business process, it's not personal. You've got to take the good with the bad. It's not my fault that they are going through this. I was simply executing what the company required. I would be as professional as possible and as quick to minimise their pain and to enable them.* *You know a good experience for me was a job well done, when I helped the person. I became passionate about career guidance and so where I could help somebody where I could say to somebody: 'the situation you were in wasn't great, this is a new beginning'. To see it as a new opportunity and my personal experience with retrenchment, every time I got a better job with better pay and a package. So wow financially it was nice. It was horrible to go through, but I learned that there's life after retrenchment. And I could share that with them"* **Participant C:** *"Retrenchment is a fact of life and as you get more experienced you realise that you may have to do it again, that's business. You focus on the task, and my responsibility.* *I would focus on the positive. I would talk about their skills sets and that I didn't think that they would have a problem finding work again. If the guy had entrepreneurial ability, I would say" you have always talked about this, maybe this is the break you needed to start your own thing. That positive approach would help me cope with it better. I tried to get it on the table within the first 30 seconds so that we can talk use the rest of the 30 min to talk about the positive stuff"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant D: *"After the first couple of times, I realised it's what is best for the company and so it's ultimately what's best for me...Then we shake hands and off they go, we always parted in a good way"*
		Participant E: *"I rationalised by saying: 'I would rather do it than let others do it'"*
		Participant G: *"It's part of modern day life. The environment is changing so quickly, inevitably it's going to affect how you deliver to your customer, especially because the type of industry we are in and everything is becoming more electronic, which means less and less people. I have a responsibility to the organisation and to the people that are left behind to make sure that they have every possible chance to succeed, otherwise we would be braaing 'tjops' during the middle of the week and nobody would have jobs"*
		Participant H: *"I rationalised that it's not me personally, whatever you represent in this position, as HR is quite another thing. So I am acting as HR director for the company. I came across as cold-hearted and I just went through the motions: 'lets just do it' and after a while I didn't feel emotions"*
		Now, if the conversation becomes emotional or argumentative, I tell them: 'I told you what we are doing and what's happening with you. I think you need to think about'. We get back together in two-three days and talk about it again. If the guy becomes emotional, I would definitely sit through and try and help that person before they walk of my office, even if it takes an hour, I don't care. I will try and understand what is so upsetting and try and get them to a point to say: 'well maybe it's a new opportunity', so we talk about. Maybe they have just bought a house. Then I will say to them: 'Remember that your pension fund would pay out, you'll have a retrenchment package, and then you will at least be able for 2 years not to work, you know and within that time, most people find a job within six months to a year, anyway'. So I try and see, make them see that life is not all grim. Then I sort of try and bring them back to reality: 'you need to re-arrange your life, but let's see how we can do it. Look, there are options that you can choose.' I've had financial advisers come out if there is a need, you know. If it were going to be a financial crisis for them, then I would have a financial advisor for them. If it is an emotional crises, I would get then to a psychologist. When the person has calmed down, I say: 'ok fine. Just relax. It's not going happen tomorrow. You are talking about 2-3 months down the line, you know. So you don't need to make any decisions today. You don't need to solve this problem today, we'll talk again tomorrow'. And tomorrow, by that time, they have calmed down considerably and you can actually walk them through the process"
		Participant I: *"At first I was quite clinical and focused on the task"*
		Participant J: *"At the end of the day, it was something that was going to happen and if I did not toe the line then I must go and do something else. But that wasn't an option for me. What we did was right for the business. That I am comfortable with. I knew the rationale was right, but I didn't like the way we did. We did it too quickly, it wasn't thought through, neither was the repercussions"*
		Participant K: *"Before the new owners, we hadn't being making money so I put my business hat on. I knew that it was for the greater good and the future. From that perspective it was important to focus on the positive and also that I knew we were going to certainly try and assist them"*
		Participant M: *"I guess to focus on the process. I am too busy worrying about everyone else, to worry about me. It's more talking about the person themselves than sitting across the table. I think in the initial ones, it was, provisions of the LRA,*

Central themes	Sub themes	Words / phrases (direct speech)
		got to give the rationale. Got to do this, that, ticking boxes, where now its almost: 'this is the reality, this is how its going to affect you and lets talk about you and lets talk about it, because we are going to go through it together and how do we go through it together and defining that end point' but not letting them feel as if they are totally isolated, so it has become far more of a 'me and you' conversation and less of a 'company and you' conversation" **Participant N:** *"I justified it in that I was trusted with a difficult, messy job. So I just realised that I just got to do it. I surprised myself that I was so focused and controlled"* **Participant O:** *"After a while I just thought, this is your job, now. So you start doing it, you find out about the financial issues and you deal with the softer issues as they arise"* **Participant Q:** *"I followed consultation processes and steps outlined in section 189. Any information was first brought to the attention of staff at a meeting and then followed up in a letter. This included preparing the letters regarding the proposed retrenchment right through to the letters informing specific staff members of their retrenchments. These letters were drafted and printed by HR and given to staff by their line managers. The final notification of retrenchment was done verbally by the line manager and then I followed up with letter"*
	Coping for the conversation: Quarantining/ compartmentalise work and personal	**Participant A:** *"I looked at her and said nothing. I wanted her to finish. And I looked at her and thought: 'you know you're so angry'. I allowed her to finish and I said to her, 'are you now finished, lets see how we can help you' There is a certain amount of detachment and yet a certain amount of feeling goes into it. I never thought I was saving the organisation. That was the consultant's job, although I really had issues with them and their promises. We had to go out like puppets and execute"* **Participant C:** *"You deal with it professionally on the outside, but inside you feel different, you just don't show it"* **Participant D:** *"But in this profession I cannot afford to be too emotionally involved, because I know I am going to do it properly. I had to learn that very quickly"* **Participant E:** *"There is no way you can just quarantine yourself. I am good at shutting off work from pleasure. I am good at separating if I have given you a written warning and then go and have dinner with you tonight, but there is something inside of me that, when you are hurting, wants to reach out and try and help you. That is a helpful coping mechanism, perhaps it's compartmentalising.* *Biggest thing for me is to know that I care. Going in there and knowing that you are dealing with a human being who is so down at the moment and so battered and bruised and try and help them through it, not their or my fault, That is a person there who needed someone to help them, be empathetic not too sympathetic"* **Participant F:** *"As I did more and more, I became desensitised, which is quite sad and that bothers me. Yes I have a job to do but at the same token it is at a huge sacrifice to you. But what I have learned to do is to start to compartmentalise which is why I think I have become desensitised, believe it or not, despite our executives we have a very much family scenario here, so I know everyone's name here, I know their children's names. I know them all personally so it's difficult. So I used compartmentalising as a coping mechanism at the time. You know I am one of those people that chew at home constantly which is why I suffer"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant G: *"It is a part of the job. I suppose I get quite focused and clinical, when I say clinical, I can't allow an individual's lets say personal circumstances to play too much of a role. But having said that, if I think back to [company name], I had lets say 2 people, same years of service, pickers, unskilled labour. One was married with a wife and kids; we knew his wife was working. The other was a single mother. We went to the first guy, told him we are going to keep the single mother because of her personal circumstances. You can only do that in very selective circumstances, it's not a general thing you do"* **Participant H:** *"I thought it necessary to do it, you know. I would be very business-like, without any emotional stuff. It is business, you know, bad things happen"* **Participant I:** *"I completed the task and with time I showed more empathy. I am by nature a very task orientated person. I knew what we where trying to achieve and it was for the greater good of the company and the other employees and so I was very clear as to why I was doing it"* **Participant K:** *"With time you somehow got disconnected, it was weird. But then again, I am still in contact with many that I retrenched and it became a process were we would just chat and I could be there for them not just as a colleague, but also as a friend. In that way we helped each other, because I think many understood my position and a lot actually said that to me"* **Participant L:** *"I depersonalised it, and rationalized the discussion, trying to think: 'what has the person done wrong', so you can be angry at the person, distancing yourself, trying to break the relationship, prior to the discussion, in my mind"* **Participant M:** *"I tend to be involved from start to finish. In my case if I hadn't been involved, then it would become quite factual and boxed. Which is why I make it more personal, and not that I am simply the messenger, by knowing the personalities, it makes it easier to get more involved and personal and that has made it easier for me to get through it"* **Participant N:** *"I think the feedback that I got in most instances was positive. I surprised myself that I was so focused and controlled, totally controlled"* **Participant O:** *"I would just pack my emotions in a box, especially when you realise that you can't do anything about it"*
	Coping for the conversation: Divert attention	**Participant A:** *"I would walk the dog"* **Participant C:** *"Because of the terrible way in which they handled things, I had no concern about contradicting company policy and not being at work, myself and the sales manager – he would phone me and say: 'what are you doing' and I would say: 'nothing' and we would then go and play golf and drink a few beers and that was how we got through it. I think in that month, we played about 20 games of golf"* **Participant F:** *"You bury yourself in work, so you don't have to deal with it"* **Participant G:** *"I have a couple of 'toots' [laughing]."* **Participant H:** *"I would read 2 books a week. Fiction, non-fiction, anything just to break away from it. Afterwards I was physically very tired and I was in a really bad way. I went on a holiday to Thailand"* **Participant I:** *"I knew the whole thing off pat…I knew I just had to say it all and exactly what I had to say"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant J: *"After the burnout, I took two weeks leave and went to watch my son play in an international golf tournament"*
		Participant K: *"I exercised a lot and I would go into my own little world and try and deal with things on my own"*
		Participant L: *"I would fill my weekends with things to do, so that I don't have to deal with it. Did I drink more? Yes at the young age, you deal with anxieties differently, you just start to party harder"*
		Participant M: *"Exercise, when I can"*
		Participant N: *"I went on leave 2 weeks before the process started and considered getting counselling at some other time.*
		You have script and you have to follow the script word for word. In the workshops, they told us: 'don't be emotional, don't be apologetic, it is really sticking to the facts'. So that was the one-on-one, carefully scripted by me, notes being taken by HR. The retrenchee had an opportunity to speak and ask questions for clarification, but I treated the meeting very clinically, because that was how I was going to deal with it. Some people would say: 'it's because of such and such that happened 2 years ago' and I had to respond that it was because of the interview process and this is the selection criterion. I would show them their numbers and say: '3 other people did better than you and these were the reasons you scored poorly on supervisory skills or whatever'"
		Participant O: *"We always had a very active social life, so I would just talk trivial stuff to my friends, none of them were in HR and would have had anything to say other than 'ag shame' and I didn't need that, I did not need more sympathy"*
		Participant Q: *"I also at that stage smoked and did a lot more of this!"*
	Coping for the conversation: Releasing emotions	**Participant A:** *"Before the interview I would go to the bathroom, take a deep breath, make a cup of tea, you know you've got to do this, so off you go and do it.*
		It felt like nobody cared about what you were going through.
		I would talk to my husband; he's my best friend. I would go home to my husband and use him as a sounding board and a confidante, it's important to have someone to talk to"
		Participant C: *"In Company A, we relied on each other for support and would discuss difficulties amoungst ourselves. I knew I could approach the HR guy if I needed to. Fortunately my superior was quite good in saying how I was handling things. He would have one-on-one sessions with his manager and there was concern for how you where coping with the situation. HR also supported us. If you where feeling: 'I am not coping with this, there was help'. The CEO even was there.*
		In company B the management team supported each other, because we had none from the top.
		I also had support at home."
		Participant D: *"In the beginning I would discuss it with my dad.*
		I had a mentor who sat through one or two with me, I would participate but he would lead the consultation process"
		Participant E: *"I would go home and pour the whole world out to my husband,*

Central themes	Sub themes	Words / phrases (direct speech)
		he'd say: 'well you shouldn't have', typical man and that was the last thing I needed. At work, I would go and dump with another manager and they would sit there, thinking 'poor [own name], is she going to sleep tonight', but I have offloaded. Or I would make an appointment with the psychologist because I realised that's the way to do I. I went for 6 counselling sessions and it was very helpful, it turned me around completely. I learnt coping tools and to set boundaries, what's my responsibility, what's the managers' responsibility" **Participant F:** *"Suddenly it caught up with me. I took advice, that I go and see a counsellor myself, which I did. It did help to see a counsellor, because you are not holding everything inside. I went quite a while later after the retrenchment.* *At home, it was a combination of listening, often taking over certain responsibilities and going out for dinner instead of cooking"* **Participant G:** *"As a management team we did this together"* **Participant H***: "I saw a psychologist last year after the divorce and obviously the retrenchments"* **Participant I:** *"I had support from HR, who sat in with me and gave me feedback"* **Participant J:** *"I am close with one of the group directors, who is also my direct boss and we talk a lot. That actually pulled me through. He pulled me through, because he understands it the way I do. We have an incredibly trusting relationship and understanding. He is a huge 'crutch' for me. He has guided me to deal with it. He has been very supportive and agrees that the group MD knocked my confidence; you tend to lose it, because he does not listen. After the burnout episode, my boss told me to go and take time off.* *I think the turning point also came when the lady that we use for our strategy sessions came and said to me 'I have never seen you like this'. She gave me counselling for about an hour. She helped me quite a lot. She said: 'stop feeling sorry for yourself; you have to deal with this now and move on. She is keeping in touch with me and I feel more confident now. Because basically, I think the group MD knocked my confidence"* **Participant K:** *"The team I worked with was amazing. We would talk about difficult cases amoungst ourselves. We also had support from the national HR manager and as regional managers we relied on each other to talk about things. So that helped because you realised that you always have someone to talk to if you get stuck or didn't know what to do"* **Participant L:** *"In the early days I didn't seek counselling. 'Asseblief, ek is 'n man!' I mean you are at that stage where you can conquer the world. With the merger, much later, I had a child and so my perspective changed. I now see a psychologist and he said to me: 'during our 20's and 30's these, things don't have a visible impact, but it hits you when you hit your 40's"* **Participant M:** *"Never even crossed my mind, it's a matter of you guys are coming to me, I need to be here to support you rather than thinking of what I was needing.* *No I never went for counselling, not that I think it is a weakness, I just simply haven't thought about it. I suppose preparing others was a way to release emotions. I have spent more on the process than wondering about what I feel, perhaps I have that old 'male bullet-proof' thing"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant N: *"Well I spoke to my wife about the accident. She knew him as well. At the time I didn't seek help. Talking to you now, I am surprised how emotional I feel about it now and how it is affecting me now. Maybe there is room for closure. Maybe I should talk to somebody about it. I didn't use the psychological counselling facilities offered. I didn't think I needed it, then.* *As a management team we didn't get together formally and talk about how things were going. We just spoke at managers meetings about reaching our targets. But i.t.o. help and support, the other guys were like: 'I just want to do my stuff, I've got enough trouble and things that I got to do'* *I told my wife that retrenchments were happening and it could affect us. The family were quite glad that I was selected in and relieved that at least now the pressure was off me. So, she understood. I described the job that I now had to do for a few months. She was supportive.* *I remembered what the workshop told us, you know, don't be apologetic and don't say: 'good luck'. You did it outside, but in the interview itself, you go through the process, its quite clinical"* **Participant O:** *"The other HR manager and I, while we were colleagues, we didn't talk about individual cases; we just got on with it.* *I didn't go for counselling at all, but thinking back now it probably would have helped me handle things better. That and some training"* **Participant Q:** *"I had support from my family, colleagues and some senior managers and executives. My husband, who is an attorney with labour experience, was a great source of support"*

Central themes	Sub themes	Words / phrases (direct speech)
Enabling strategies	**Organisational Emotional Support**	**Participant A:** *"It was an unfair load. They could have come down and said to me, I see that you are writing repeated memos, are you coping? I was too proud to drop the ball. It's not in my nature- you know cause that would reflect badly on me so I would try and work hard and fast and more and quicker. It would be nice to ask the person: 'are you coping?' You know: 'do you need help?' Without making you feel incompetent. Without making you feel that your career will be judged. You know as a result of: 'are you tough enough?' As a woman it's doubly so. You know: 'can you do it as well as your male colleagues?"* **Participant E:** *"There needs to be some kind of support before, during and after"* **Participant F:** *"In this company there was no support. The top needs to have proper awareness and understanding"* **Participant G:** *"I think that companies have really done a lot of effort to support mechanisms, i.e. if you don't have an in-house psychologist or whatever, then to contract people in for the duration going through that type of exercise. Ensuring that you have a proper maintained database of people who have left contact numbers, whatever the case may be, so that you can contact them. Also support for the person that must break the news is important, although in my case I didn't break the news"* **Participant I:** *"I could talk to [name] and [name] in HR"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant J: *"They need to listen to you. I had HR supporting me and my direct boss, but the main decision-maker didn't listen to my advice about the repercussions, that knocks your confidence"*
		Participant K: *"I know that I don't want to do this again, which is why I moved out of general HR into training and development"*
		Participant L: *"From an organisational perspective, they need to play a role in preparing you and supporting you"*
		Participant M: *"I provided a lot of support to my managers, especially when retrenchment conversations didn't go so well. I also provide support to the victims. An example I can think of now: 'When we go into the retrenchment discussion, very often if the manager starts battling, I will take over and we will talk and so very often that manager will then leave or we will all leave and I will say to that person: 'can I have a chat with you and they will come through and we will have a meeting outside of the meeting'"*
		Participant O: *"I had none"*
		Participant Q: *"I had support from colleagues and some senior managers and executives. I was disillusioned with the status quo and management style and clashed with my director on a number of issues"*
	Training	**Participant C:** *"I think emotional intelligence development would be helpful. Reading literature is also good. Customise the training; I was a young manager the first time. Perhaps do role-plays"*
		Participant D: *"I think having a mentor or coach definitely helps and knowing the LRA provisions"*
		Participant E: *"Nothing in life will prepare you for this, but I would do just-in-time training with role-plays"*
		Participant F: *"They should put retrenchment counselling into the HR syllabus"*
		Participant G: *"No training lets say from a degree or qualification point of view can prepare you for that. But I think you probably could, not that I have been exposed to any, things like how to deal with people disappointment, which one could run, because I think that is one feeling that anybody would have on the receiving side: 'I am a failure, I was not good enough'. The how to deal with that, and that is something which I think is from a line manager's point of view, is to know that that is how someone feels, is how to deal with that. Run conflict management courses as some people may take exception to being retrenched, run 'Just In Time' courses"*
		Participant H: *"I look after everybody's development and make sure that they get what they need. As HR, I try to get my managers to break the news most of the time. I am there to facilitate the process. You are making am major impact on their lives, so I try and prepare them for that"*
		Participant I: *"We were coached, that's good. I would say slow down the pace and try to get the person to relax. It's not necessarily good having two people in the room, then its not a like you versus them situation"*
		Participant J: *"I had HR there for support and coaching me"*
		Participant K: *"Training beforehand on what you can expect and coaching on what to say and what to do and feedback on how you are doing during the first couple of times"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant L: *"I think they need to coach you or something and in it prepare you for what you can expect. Not just the legal stuff"* **Participant M:** *"In preparing others, to the extent that I say lets walk through a script and lets role-play a little bit about what we are going to be seeing and 'when you see this emotion, how do you think you are going to react to that? How do you think you could do better?' and that is preparing them"* **Participant N:** *"The workshop beforehand helped in preparing us"* **Participant O:** *"I had no training to deal with this. I wish I had some sort of coaching on what to expect, what are the typical questions you would get and the kinds of emotions you can expect or at least have someone with you in the office when you break the news, because what if they have an emotional breakdown, how do you handle that?"* **Participant Q:** *"We as the HR department educated the line managers i.t.o. their responsibilities, the legal requirements like the LRA section 189, codes of good practice, the Employment Equity Act and the concept of fair discrimination; and ramifications of retrenchment. We also trained them on handling the emotional aspects and gave lots of opportunity for role-plays to acquire skills. Some were reluctant and had to be 'forced' to undergo this training as they maybe underestimated the importance thereof. I would like to suggest that possibly one implements a buddy system for 'at risk' managers to support them through the retrenchment process, especially new or young appointees, in-training affirmative candidates who are being groomed or mentored for higher positions, etc"*
	Psychological Counselling	**Participant A:** *"Definitely, if you need it"* **Participant C:** *"Maybe go for counselling"* **Participant E:** *"Definitely counselling. There needs to be some kind of counselling before, during and after"* **Participant F:** *"They should provide counselling to you too. I am not saying 'play nursery school', but more consideration should be given to the rest of the staff and the bearer of bad news"* **Participant H:** *"I would definitely recommend that they go to someone, where they can pack out. A lot of emotional stuff and stress builds up. You are directly responsible for changing someone's life course. You are an instrument and that is quite heavy and a huge responsibility"* **Participant J:** *"I think if you have an opportunity, go for counselling. You got to get someone like [name] who can provide that for you"* **Participant K:** *"Debrief counselling is good because it helps you get energy again and reminds you of your responsibilities and what you role is. Just to get perspective back again"* **Participant L:** *"You need to speak up and say if you need help or counselling or whatever"* **Participant M:** *"As I said, I didn't go for counselling, but I always made myself available for the implementing manager to come and see me"* **Participant N:** *"I didn't have counselling, although it was available. Now I think I*

Central themes	Sub themes	Words / phrases (direct speech)
		may go, closure is good" **Participant O:** *"I would strongly advise that companies consider contracting in a psychologist if they don't have someone in-house, to also assist the person who has to break the news"* **Participant Q:** *" I would like to suggest mandatory counselling for all managers and the union officials post the retrenchment with a follow up a few months later to ensure that they are not carrying guilt, stress or other baggage"*
	Psychological contract	**Participant A:** *"Why do you wait for the company? Save yourself for Gods sake if they haven't promoted you, it doesn't mean that they don't see it in you. I've had hard sessions with my people, told them to take ownership for their career, its okay to work for more than one company these days. I believe firmly individual, take charge of your career. I always say to people when I interview them: 'where do you want to end up? You have got 30 more years. And what do you need to get there? What training, what skills, and your career must fit in like Lego blocks. I am very passionate about this, I get very angry with people who are like a victim and sob and cry 'the company's not doing anything' [put on sob voice]. The company needs to pay money for labour, that's it"* **Participant D:** *"Make them first of all think about it that their career is actually in their hands and not necessarily in mine. The structure of the company is in such a way that it enables a career path, especially on the line side. So there is a very clear path which goes all around, but the crux of it is there is always potential of retrenchment and don't expect to get promotions because there are positions or that you've got six years or ten years in the company, what have you to show for that"* **Participant E:** *"While you are with us we will pay a good a price for what you have to offer us, we will expect you will move on in time, because you we might not always be able to offer you... definitely, some people have that mindset, but the majority don't. Part of our leadership training, tells people that life isn't like this. I think the youngsters don't work for long, but a lot still come into the workplace expecting they can go when they are ready to go but as a company, we expect you stay as long as we want to stay. We haven't made that shift yet. It's just something we have to keep encouraging because it's a fact of life. Organisations are not doing enough of talking about self-management because they probably still have the old mindset. Retrenchment is a dirty word"* **Participant F:** *"Yes the world of work is changing, but human resources is your only competitive resource now"* **Participant G:** *"Make all employees aware of the life long employment fairy tale. It can happen to anyone at any stage. Retrenchment is everyday in the newspapers. In banking I see peoples CV's all the time and every 10 or 15 years or so, you see they come back to us, but that is our industry, banking is banking. They learn new skills and ways of doing things and we get the benefit, but then they leave again and so it goes around in circles"* **Participant H:** *"On the lower levels it's like: 'just look after us and love us'. On the higher levels, it's more of a relationship type contract, which stipulates what is expected from you and in return you get a salary kind of thing. And if you do more than is expected, you maybe get a promotion.* *But I also find now that people are very aware that job security is part of the past and I also find that because of it, people are more responsible towards their jobs. People look after their jobs. They know their job security is not guaranteed, anything can happen and we communicate that: 'none of us are safe' and I think it is ridiculous to think that you are. Especially in the current economic and industry*

Central themes	Sub themes	Words / phrases (direct speech)
		climate, there is so much happening in the global economy at the moment, you know business is changing. The unions did, after the last retrenchments. They came with a thing to say: 'look, they want an agreement in place that guarantees job security for the next five years'. And I said to them: 'are you insane. Now how on earth can we guarantee a job for 5 years? It's just not happening'. And they actually came with a dispute. There's new folks opening up and closing all the time. Plastics, we're in the plastics industry. You know the government can decide tomorrow that packaging is no more, you know, like the plastics guys. I said to them: 'you know you just cannot have anything like that anymore. As much as we would like to have a business in 5 years time, I cannot guarantee it'. So I worked hard to get that message out. I don't think anybody can expect to work here forever. They do expect to work here forever, but they know it's not a guarantee. *Especially with our middle and junior management, we say: 'look you are responsible for your development and your career and blah, blah, blah''. People do expect you to actually sit down with them and map out a career. We do, we do. I have done it in the past. I say: 'look, this is all very nice in theory, but anything can happen. That position that you are aiming for, might not open in the next ten years, you know, or it might become redundant, or what ever"* **Participant J:** *"You can't sit here and your career is made for you, you have to make it and make it work. Your actions are going to secure your future. A lot of people don't think; they are comfortable. I had it with two of my guys and I took them off my management team. They have been on for 25 years. It was a hell of a decision, but I could live with that decision because I went through all the rationale before I took them off. I wrote it down and went through it with them and I told them why. I was clear and spot on"* **Participant K:** *"The question mark is from a business point of view, is it really the company's responsibility and to what extent would it be a responsibility and from an HR side and people side, ja I do think it is important you know any support you can give outside of just the work. I think you get so much more value from people if you are focusing on more than just the job at hand and preparing them for the future; whether the future is with you and your business or elsewhere so you can get the best from them. But not every one believes in that way especially from a business perspective. Bottom line"* **Participant L:** *"Don't think this organization is going to look after you 'ad infinito'. You have to ask yourself: 'What have you done to develop yourself as a product?'"* **Participant N:** *"I think the notion of 'jobs for life' is old fashioned. I don't think it can exist anymore. And we've, this company has been saying that for a number of years, that people have choices. Choose to stay or choose to leave, and the company also has choices so I think the notion of 'jobs for life', I think is gone.* *In general I don't know whether the companies are doing that, or whether people are just not listening as well. It is easy to feel that I have worked here for 10 years, I must work here for another 10 years"* **Participant O:** *"I don't think companies share enough about their financial position. Or spend what they should on training people in any case. But if you were in a potential retrenchment situation, get the employees involved, give them a period within which to come up with ideas and allow them a chance to try and turn the companies down. We don't have jobs for life anymore, that is a fact, but employees aren't prepared for that, especially the lower level ones. But then again, neither was I"*

Central themes	Sub themes	Words / phrases (direct speech)
		Participant Q: "*I do not believe organisations always do what they would like to i.t.o. training and development to increase skills and competences because of the associated costs. In the same way individuals do not prepare themselves to manage their own skills through training and development, etc. because many just cannot afford to do so*"
	Personal Preparation	**Participant A:** "*I would be helpful and cooperative. I would always be well prepared. Make sure everything is right for them, their confirmation of employment, UIF card, all their salary stuff, everything that needed to be done. I make the experience as painless as possible, having been retrenched myself, I realised what it does to people.* *I would advise them not to listen so easily to consultants. I would like them to go and do a process review and learn from the past.*" **Participant C:** "*I don't think anything can prepare you, until you go through it personally. You don't prepare yourself, until you actually have to do it. But one thing that I did think about is: 'how will this person react?' and depending on how well you know the employee, and so you may approach it accordingly. But I find I go into it thinking, I am going to have to manage it situationally as it develops*" **Participant D:** "*Also sticking to the letter of the LRA, so you must know it, just follow the process and then you know you are not going to deviate from it, if you go with a blank sheet, you will get distracted and you forget about the key aspects you have to cover. It's still the hardest thing to do after all these years. It is still the thing you take the greatest care of, you cover all the angles and you make sure that you don't make any mistakes because you are not just dealing with the law, you are dealing with someone who has worked for a number of years and who is going to lose his job. I would think about it at night before I go to sleep: 'what must I do the next day, what is the following step? What do I still have to do? What is the union's next step going to be? What else are they going to bring up, have I covered for everything? So it was more from a technical preparation aspect, but I did not really get anxious*" **Participant E:** "*Nothing in life will prepare you for this, I think people need to understand that when someone is retrenched they are going through exactly the same as if they were getting divorced or someone died and they need to understand that that is what they are doing to somebody. Same set of emotions and phases. Just need to understand human behaviour in a crisis. You can get them that much closer, at least a cerebral and emotional understanding of what's happening.* *I'd think: 'how am I going to make this person go away with their dignity in place?' I would prepare well, have all their paperwork and severance pay ready. If I was going to sit with people who where about to be involved in breaking the bad news I would definitely go through role plays and I would tell them about as many experiences I can remember having just to prepare them for what they might be in for.* *There were a lot of people who I grown to be friends with and work with closely on a day-to-day basis. And if you know the individuals you also know how to approach them, people need to be approached differently. If you don't know the people it's more difficult*" **Participant F:** "*I had no time to prepare, I came back from overseas and a few hours later, I had to tell them.* *They should do a feasibility study i.t.o. retrenchments, the pro's and con's and do more to create awareness with CEO's and MD's who don't know the knock on*

Central themes	Sub themes	Words / phrases (direct speech)
		impact"
		Participant G: *"I think the whole issue with retrenchment is no what matter is done, it is with absolute 120% integrity. That is crucial. Because you know, if a line manager is aware that the company is going beyond what is legally required and really is showing that, look: 'we want to help in whatever matter is possible', you then can honestly say to a person we're doing as much as we can. That makes your interaction with a person easy"*
		Participant H: *"As HR, I try to get my managers to break the news most of the time. I am there to facilitate the process. You are making am major impact on their lives, so I try and prepare them for that.*
		I needed a hell of a lot of help and I said to the directors: 'no problem, right, what do you want to do and how do you want to do it', then I phoned everyone I know and I said: 'help'. So I put together a 'recipe', it was just a question of filling in the gaps. I then went back to the directors: 'Ok fine, what are your reasons, give me everything' and they showed me financials, they showed me market share, they showed me everything and I put everything together. 'What are you prepared to offer as retrenchment packages?' they gave it to me. 'When you want to do this by?' and they gave me a date. And so, I got all the ingredients of the cake together. And I said: 'Ok, fine, now I had to phone the union. I phoned the union. I said: 'I will facilitate the meeting, but you need to come up alternatives' They had questions, the directors answered it and that was fine. So the first retrenchment was the most difficult and from there it was really just following the process"
		Participant I: *"Know what you have to say. It's not easy. I rehearsed in the car"*
		Participant J: *"Personally nothing, because it came so fast...Do this thing with a rationale behind it - we needed help. We could not deal with it inside. People want inclusion. Have someone who takes you through the change process. I mean all the staff. If you have inclusion, then people tend to deal with it a lot better. You cannot include them on everything; but there is a large part that you can. We didn't put enough thought into who is going to be hurt"*
		Participant K: *"I asked a lot of questions and made sure that I had answers, so I put myself in their shoes and asked what I thought they would ask. So I had my 'ducks in a row' and was well prepared, I knew the facts. Also because the communication beforehand was so good, that helped. The communication is important, openness and transparency, people have to be kept in the loop the whole time, that's hugely valuable and also to focus on the positive outcomes as to what the results could be. And really your personal efforts - make sure you go the extra mile for that person, even if it takes up all your energy"*
		Participant M: *"Preparation is key. Have a structure. There are 3 layers to this thing; There's Legal, There's the process, and there's emotion. Preparing for each of those very clearly. And then it would also be; don't be afraid of the emotions, don't be afraid of the emotional side of the situation. Very often people are scared to go there and it's when you go there that it actually makes it easier for both parties. It's like a person being told they've got cancer, they would rather hear that they've got it, than to suspect that they might have it. So get in there, once you've got that news on the table then work with it.*
		I would do a lot of planning. The next steps and so on. I would make sure there is a lot of structure. Not only for me, but also for the benefit of the mangers who had to do the implementing and for the victims. I do a Gant chart, with details, which is probably my safety blanket. Until you get to a point where you think: 'Ok, I have dealt with that Ok and got through that'"

Central themes	Sub themes	Words / phrases (direct speech)
		Participant N: *"Make sure that you are prepared for the practical side of things, but also prepare for it emotionally, decide on how you are going to respond. I think I would say, stick to the job that you need to do, even if it is your best friend across the table. You know, you can take that outside the office and maybe you can hug each other and do all that, but not in the office in the exit interview. It is not appropriate. I don't think it helps either party to understand that there is a break up in here. You know, if you are not clear about that, then there is doubt in the mind.* *I would try to anticipate how the person would respond. I knew all of the people myself and I found myself thinking: 'I bet he says this'. I knew what I had to say i.t.o. the script and how I was going to react"* **Participant O:** *"I just went in everyday and did what I had to do. Nothing in my training had prepared me for this. I knew the legal procedures, so I just found out about the financial procedures and dealt with the softer issues as they arise"* **Participant Q:** *"As a part-time lecture, with an honours in psychology. It prepared me for the emotional side. I know the provisions of section 189. I also worked with corporate legal specialist and the legal department. It wasn't easy though - it was an unpleasant task.* *I would like to suggest also that feedback is given to all managers, union and employees in a manner that all understand at the different levels on the successes of the retrenchment, if you don't make sure; people may be in the dark as to the positives"*