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Individual and Organizational Correlates of Promotion Refusal

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Individual and organizational correlates of employees who refuse seniority-based promotions in union lines of progression are examined. The sample consisted of 313 production employees of a large manufacturing complex. Correlational and discriminant analyses revealed that age, being female, and number of employees in the department related positively to promotion refusal, while years of education and pay showed a negative relationship. Of these variables, years of education was the strongest predictor. Potential explanations for the results relate to stress avoidance, perceived inabilities, and equity theory. Areas for future research are suggested.

Approximately 93% of all collective bargaining agreements with promotion provisions consider seniority as a factor in promotions (U.S. Department of Labor, 1970). Seniority is the primary or sole factor in 41% of these agreements. Consequently, in most industrial operations that are governed by a union contract, temporary and permanent vacancies in higher-level jobs are usually filled by employees with the greatest seniority in lower-level jobs. In operations which have distinct lines of progression, openings at a particular level are usually filled by the most senior employees from the next lower level. Frequently, for one reason or another, employees decide to stay in the same job and not take temporary

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or permanent promotions to higher-level jobs. Although not encouraged, most union contracts either explicitly or implicitly allow employees this option.

When employees refuse promotions, it can cause many problems. The following situation illustrates the potentially serious effects of such decisions. Suppose there are eight jobs in a line of progression and four employees in each job (i.e., one employee for each of four shifts). Therefore, there would be 32 employees in this line of progression. If one of the 32 employees refuses a promotion, the situation is only inconvenient. However, if three or four employees at a particular level refuse promotion, a more serious situation is created. In this latter case, the line of progression becomes blocked. Vacancies in higher-level jobs must be filled by employees who have not had the experience of progressing up through all prior jobs. In other words, people have to take temporary and permanent promotions two or three levels up the line of progression. Since the successful performance of any given job usually depends upon knowledge of the jobs beneath it, the new employees must learn many jobs simultaneously. Even if only a single job level is skipped, training time may be increased substantially. Not only is much supervisor and co-worker time required for this training, but often an additional employee is needed on each shift to help during these intensive training periods. This problem is especially serious in lower-level jobs where training for progression is most critical. Also, even when only a few jobs in a line of progression are held by employees who refused promotion, troublesome operating problems occur. This disrupts the natural and smooth movement of employees, reduces scheduling flexibility, makes vacations problematic, and lowers efficiency due to the additional burden on all the other employees in the same line of progression.

There may be a variety of explanations for why employees refuse promotion. One general class of reasons relates to the jobs themselves. For example, the next higher-level job may be perceived to be distasteful in some way (e.g., dirtier, more physically demanding, demands more responsibility). Another general class of reasons may relate to the characteristics of the employees themselves. Some employees may resist change, fear failure, or want more or less overtime than the new job requires. Finally, another class of reasons pertains to the transition process itself. The process of changing jobs may be handled differently, requiring greater changes in tasks or work groups, across various departments or lines of progression. Such differences may affect the degree of role ambiguity, uncertainty, or tension associated with being promoted.

It should be noted that in some instances it may be beneficial for an employee to refuse a promotion. If the refusal is due to a recognized inability to learn the higher-level job or to an unwillingness to perform its required duties, it may merely reflect efficient self-placement. Moreover,

it may prevent more troublesome problems that would materialize if inappropriate people were promoted.

What is required is a better understanding of this process so that promotion refusal can be more effectively managed. Since we were unable to find a single study of promotion refusal in the existing literature, the present study is an initial exploration of this phenomenon. For practical reasons, it was limited to data available in archival sources. Such data can be obtained efficiently and unobtrusively; hence, they provide a reasonable means to begin the study of promotion refusal. Though the available data included only biographic variables and limited information on organizational context (e.g., department size), a number of studies have shown that biographic information is predictive of important organizational outcomes such as turnover (Bass & Barrett, 1972), and thus may be predictive of promotion refusal. Furthermore, biographic variables may be suggestive of underlying psychological processes to be explored in future research. For these reasons, the present study was limited to an empirical assessment of the relation between promotion refusal and individual variables such as age, sex, race, and education; and organizational variables such as pay, job tenure, and department size.

METHOD

Sample. The sample consisted of production employees in a large eastern manufacturing complex. For a 2-year time period, the occurrences of promotion refusal among the hourly employees were recorded. Due to a major plant expansion, each hourly employee was offered at least one promotion during this time period. This was especially true in the lower-level jobs where movement was more rapid. A preliminary analysis revealed that 106 employees had refused promotion, approximately 7% of the permanent hourly work force. Surprisingly, 43 (40.6%) of these employees were recent transfers to the complex from other divisions outside the plant. Upon further investigation, it was discovered that 13.7% of the 313 transferees had refused promotion; whereas only 5.2% of the non-transfer employees had refused promotion.

For two reasons, it was decided to base the present analysis exclusively on the group of recent transfers. First, as mentioned above, the incidence of promotion refusal was much higher in this group, which makes predicting such behavior more feasible. Second, these employees were concentrated in the lower-level jobs and thus represented the most immediate practical problem.

The transfer sample was 88.4% black and 91.5% male. Their average age was 36.7, average job tenure since transfer was 2.8 years, and average total tenure with the company was 8.4 years.

Measures. The variables explored in this study were extracted from personnel data files. They were age, sex, race, years of formal education,

years of company tenure, years of plant tenure, pay, department size, and number of transfers in each department. Whether an employee had refused promotions was also determined by examining personnel files for forms waiving rights to take the next higher job.

RESULTS

Table 1 shows the means, standard deviations, correlations, and standardized discriminant function coefficients for the individual and organizational level variables. Examination of the correlations reveals that five of the nine variables show significant relationships with promotion response. Compared to employees who accept promotion, employees who refused promotion tend to be older ($r = .22, p < .001$), are more likely to be female ($r = .11, p < .05$), have fewer years of formal education ($r = -.29, p < .001$), receive slightly less pay ($r = -.16, p < .01$), and work in departments that have larger numbers of transfer employees ($r = .14, p < .01$).

The five significant variables from these bivariate analyses were submitted to a multivariate discriminant analysis. The resulting discriminant function is highly significant, $\chi^2(5) = 49.17$, $p < .001$. The canonical correlation between these variables and group membership is .38. The discriminant function correctly classifies 86% of the employees who refused promotion. The importance of each of the variables in the function is shown by the standardized discriminant function coefficients in the last column on Table 1. Years of education is the most important variable in the function, followed by number of transfers in the department. Age and sex are equal in importance and pay is least important.

Since years of education seems to be the strongest correlate of promotion refusal, two additional analyses were conducted to explore this relationship in more detail. First, partial correlations were calculated to determine if age or sex effects were spuriously reflected in the correlation between education and promotion response. The correlation between education and promotion refusal is $-.21$ ($p < .001$) with age partialled out, $-.31$ ($p < .001$) with sex partialled out, and $-.24$ ($p < .001$) with both age and sex partialled out. Thus, it cannot be attributed to the spurious effects of sex or age. Another analysis was conducted to determine if departmental characteristics had any influence on the relationship between education and promotion response. Within-department correlations between education and promotion response do not differ significantly among those departments that had promotion refusals, $r = -.38$ ($n = 57, p < .01$), $r = -.25$ ($n = 63$, $p < .01$), and $r = -.31$ ($n = 162$, $p < .001$). Thus, departmental membership does not appear to moderate this relationship.

DISCUSSION

In brief, age, sex, years of education, pay, and number of transfers in the department were significantly related to promotion refusal. Of these

TABLE 1
Means, Standard Deviations, Correlations with Promotion Response, and Standardized Discriminant Function Coefficients for Individual and Organizational Variables

Variables	Promotion response[a]				r	Standardized discriminant function coefficient[b]
	Refused (n = 43)		Accepted (n = 270)			
	M	SD	M	SD		
Age	41.51	9.52	35.83	8.82	.22*	.32*
Sex[c]	1.16	.37	1.07	.26	.11**	.32**
Race[d]	1.88	.32	1.89	.31	−.01	
Years of education	7.70	2.78	9.89	2.49	−.29*	−.67*
Years of company tenure	8.67	3.08	8.31	2.83	.04	
Years of plant tenure	2.74	.90	2.77	1.68	.00	
Pay (dollars/hr)	7.09	.19	7.31	.49	−.16***	−.20***
Department size	316.84	34.36	304.31	78.99	.06	
Number of transfers in department	128.39	49.00	105.27	57.61	.14***	.41**

[a] Promotion(s) refused coded 1, and promotion(s) accepted coded 0.
[b] Asterisks indicate significance of corresponding univariate F tests (df = 1,311).
[c] Male = 1, female = 2.
[d] White = 1, black = 2.
* $p < .001$.
** $p < .05$.
*** $p < .01$.

variables, years of education was the strongest predictor of promotion refusal.

One possible explanation for these findings centers on avoiding the tension and anxiety associated with accepting higher-level jobs. In other words, promotion refusal may be a personal strategy for handling job stress (Newman & Beehr, 1979). Further, older, female, or less educated workers may have felt (justifiably or not) less capable of performing higher-level jobs. Such jobs typically require more ability, knowledge, and responsibility than do lower-level jobs. Although promotion refusal may be a means of tension reduction for the worker, as noted earlier, promotion refusal may benefit the organization if it is based on an unwillingness or perceived inability to learn and perform a more demanding job.

Another possible way to understand the results is in terms of equity theory (Adams, 1963; Walster, Walster, & Berscheid, 1978). If education, age, or sex are perceived to be important inputs to a job and job status is perceived to be an important outcome, then the less educated, older, or female workers in a traditionally male industry may have refused seniority-based promotions in order to avoid inequity (i.e., perceived overcompensation). This interpretation is supported by the fact that promotion refusal generally resulted in slightly less pay. It also makes sense if being transferred triggers a social comparison process (Goodman, 1977), making equity considerations more important.

It is difficult to offer an explanation for why the number of transfers in the department was related to promotion refusal. However, a partial answer may be gained by reference to the effect of group norms (Hackman, 1976). Potentially, group norms among transfer employees were more accepting or encouraging of behavior such as promotion refusal. Finally, the finding that employees who refused promotions had a lower mean rate of pay might be explained by the fact that, as a group, those that refused promotions could be expected to be at lower-level jobs than those who accepted promotions, thus receiving less pay.

A comment should be made concerning the number of females in the sample and the relatively greater proportion of females in the promotion refusal group. Fewer females were in the sample simply due to the heavy physical nature of the jobs. This was particularly true in the company locations where these individuals were employed prior to transfer. Although, females were employed in a wide variety of jobs and departments within the plant. Since promotions were exclusively based on seniority, females had promotional opportunities identical to those of other transfer employees. Recent work by Stake (1979) suggests that females may have refused promotions in a greater proportion due to low self-estimates of competence or to career/home conflicts.

It must be recognized that all explanations should be interpreted cautiously since measures of potential intervening psychological mechanisms were not obtained. For example, individual differences in such variables as need for achievement (McClelland, Atkinson, Clark, & Lowell, 1953; Weiner, 1974), level of aspiration (Frank, 1935; Feather, 1967), or work alienation (Kanungo, 1979), or effects of group norms (Coch & French, 1948; Hackman, 1976; Katz & Kahn, 1978) may have an impact on promotion refusal.

It should be noted that the high proportion of blacks and low education levels of the sample may limit the generalizability of the findings to similar populations; additional research is needed to establish the generalizability of the results. Despite this limitation, the present study suggests several profitable directions for future research. Future research could eliminate some of the plausible explanations by obtaining measures of hypothesized intervening variables (e.g., perceived ability, equity, career/home conflict). Such measures were unavailable in the present study due to its archival nature. Further, future research should also focus on whether promotion refusal reflects beneficial self-placement or underused human resources. Studying patterns of job performance among employees who accept and refuse promotions may help answer this question. Finally, future research should focus on potential remedies for promotion refusal. These remedies might include counseling, training, or improved personnel placement systems.

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