

DOCUMENT RESUME

ED 097 528

CE 002 299

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TITLE Organizational Climate: Individual Preferences and Organizational Realities Revisited. Research Report No. 9.
INSTITUTION Maryland Univ., College Park. Dept. of Psychology.
SPONS AGENCY Office of Naval Research, Washington, D.C. Personnel and Training Research Programs Office.
PUB DATE Jul 74
NOTE 23p.; For related documents see CE 002 300-304
EDRS PRICE MF-\$0.75 HC-\$1.50 PLUS POSTAGE
DESCRIPTORS *Employee Attitudes; Employer Employee Relationship; Expectation; *Goodness of Fit; Individual Needs; Insurance Companies; *Organizational Climate; *Predictive Validity; *Success Factors
IDENTIFIERS Individual Preferences

ABSTRACT

In considering the success outcomes associated with a new life insurance agent entering an agency which fits his climate expectations and preferences, data were compiled from 914 of a possible 1,125 respondents. The agents completed an Agency Climate Questionnaire (ACQ) on managerial support, managerial structure, new employee concern, intra-agency conflict, agent independence, and general satisfaction. The fit between the expectations and preferences and the realities of the climate of the agencies was correlated with new agent success (tenure and sales) one year after hire. The correlations were essentially zero. It was concluded that the degree of fit of a new agent to his agency did not predict success. The practice of informing a person what to expect on a job or in a job situation appears to enhance the person's probability of success only when the organization is a basically positive one to begin with. (A 32-item list of references is included.) (AG)

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ORGANIZATIONAL CLIMATE: INDIVIDUAL PREFERENCES
AND ORGANIZATIONAL REALITIES REVISITED

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Research Report No. 9

July, 1974

The preparation of this report was supported in part by the Personnel and Training Research Programs, Psychological Sciences Division, Office of Naval Research under Contract No. N00014-67-A-0239-0025, Contract Authority Identification Number, NR 151-350, Benjamin Schneider and H. Peter Dachler, Principal Investigators.

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psychology



ED 097528

E 002299

UNCLASSIFIED

SECURITY CLASSIFICATION OF THIS PAGE (When Data Entered)

REPORT DOCUMENTATION PAGE		READ INSTRUCTIONS BEFORE COMPLETING FORM
1. REPORT NUMBER Research Report No. 9	2. GOVT ACCESSION NO.	3. RECIPIENT'S CATALOG NUMBER
4. TITLE (and Subtitle) ORGANIZATIONAL CLIMATE: INDIVIDUAL PREFERENCES AND ORGANIZATIONAL REALITIES REVISITED	5. TYPE OF REPORT & PERIOD COVERED Interim Technical Report	
	6. PERFORMING ORG. REPORT NUMBER	
7. AUTHOR(s) Benjamin Schneider	8. CONTRACT OR GRANT NUMBER(s) N00014-67-A-02? -0025	
9. PERFORMING ORGANIZATION NAME AND ADDRESS Department of Psychology University of Maryland College Park, Maryland 20742	10. PROGRAM ELEMENT, PROJECT, TASK AREA & WORK UNIT NUMBERS 61153N; RR 042-04; RR 042-04-02; NR 151-350	
11. CONTROLLING OFFICE NAME AND ADDRESS Personnel and Training Research Programs Office of Naval Research (Code 458) Arlington, Virginia 22217	12. REPORT DATE July, 1974	
	13. NUMBER OF PAGES 20	
14. MONITORING AGENCY NAME & ADDRESS (if different from Controlling Office)	15. SECURITY CLASS. (of this report) Unclassified	
	15a. DECLASSIFICATION/DOWNGRADING SCHEDULE	
16. DISTRIBUTION STATEMENT (of this Report) Approved for public release; distribution unlimited		
17. DISTRIBUTION STATEMENT (of the abstract entered in Block 20, if different from Report)		
18. SUPPLEMENTARY NOTES		
19. KEY WORDS (Continue on reverse side if necessary and identify by block number) Organizational climate, Employee expectations, Personnel Selection, Life Insurance Agents, Turnover		
20. ABSTRACT (Continue on reverse side if necessary and identify by block number) The fit of new agent (N = 194) life insurance agency climate expecta- tions and preferences to the realities of the climate of the agency they joined (N = 125) was correlated with new agent success (tenure and sales) one year after hire. The correlations were essentially zero. Further analyses suggested, however, that for one cluster of agencies (a "positive" type of agency) the <u>better</u> the fit between expectations and realities, and in another cluster (a "negative" type of agency) the <u>poorer</u> the fit of		

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preferences to realities, the higher the probability of new agent success. It was hypothesized that previous findings indicating positive outcomes for new employees who have realistic expectations may be an artifact resulting from basically "positive" organizations permitting researchers to tell new employees what it is "really" like in the organization.

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Organizational Climate: Individual Preferences
and Organizational Realities Revisited¹

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University of Maryland²

In an earlier paper, Schneider (1972) showed that the average new agent entering a life insurance agency is unlikely to find the agency climate to be congruent with his preferences. Data did suggest, however, that new agent expectations were marginally related to agency climate. In that paper average new agent climate expectations and preferences were correlated with agency manager (N = 123 agencies), agency assistant manager (N = 130 agencies) and already-employed ("old") agent (N = 109 agencies) perceptions of agency climate on each of six dimensions of life insurance agency climate (Schneider & Bartlett, 1968, 1970). Expectations were found to have low positive correlations with the perceptions of the three role occupants and were significantly correlated with old agent perceptions, while preferences had average correlations of about .05 with incumbents' perceptions.

The purpose of the present paper is to extend the earlier analysis to a consideration of the success outcomes associated with a new agent entering a life insurance agency that fits his climate expectations and preferences.

Other Studies

Previous research on matching individuals to work organizations has been concentrated at three levels of analysis. One kind of research, the traditional personnel selection problem, (Dunnette, 1966) has been able to predict a person's job success by matching job requirements to individual ability. Another research effort, the vocational psychology orientation (Crites, 1969) has taken an occupational view, matching personality orientations (particularly

interests) to relatively broad classes of occupations (c.f. Holland, 1966); this orientation has also been effective.

A variant of the research matching job requirements to individual ability has been the research, both correlational and experimental, concerned with improving the fit between required job behavior and individual expectations of what the job demands. Weitz (1956), for example, showed that the receipt of realistic information about job demands increases the probability of a new life insurance agent remaining on the job. Hackman and Lawler's (1971) research, although not conceptualized in terms of initial matching, also falls in this category. They showed that people working at jobs offering the kinds of intrinsic rewards they desired were more satisfied, had lower absenteeism rates and were evaluated more positively than people with similar desires working at jobs that could not fulfill those desires. An important finding in the Hackman and Lawler research was that people working at "fulfilling" jobs were not necessarily "better" employees (as defined above); it was the fit or match between person and job that was determinant. This finding was consistent with the individual differences orientation to job enlargement or job enrichment advocated by Hulin and Blood (1968).

A third level at which individual-work environment fit may be conceptualized is at the individual-job situation or individual-organizational level. This vantage point is consistent with the view that a worker responds to the task performed and the more general milieu in which he works rather than the task alone. This level of research focuses on the individual as having needs, desires, expectations, etc. extending beyond the fulfillment obtainable only from task performance (c.f. Porter & Steers, 1973). Thus the role of extrinsic rewards (Lawler, 1970), the support and autonomy experienced (Argyris, 1957), the interpersonal life (Tannenbaum, 1966) and the training and help the individual receives in learning the task (Goldstein, 1974) are also conceptual-

ized as having an effect on behavioral outcomes for the individual and for the organization.

While there is less research at the individual-organizational level than at the job or occupational level, some recent studies may be cited. For example, Wanous (1973), using a realistic vs. "recruiting" film as independent variable, showed that for a sample of 80 telephone operators those receiving the realistic view of the job and the job situation were less likely to think about quitting and had more realistic job expectations. The very complete set of research efforts that have been conducted at the University of Minnesota in studying vocational adjustment has resulted in a measure of Occupational Reinforcer Patterns (ORPs) comprising 21 potential rewards people may experience at work. In addition to the procedure developed for assessing the ORPs associated with any given job (Borgen, Weiss, Tinsley, Dawis & Lofquist, 1968), a questionnaire (the Minnesota Importance Questionnaire or MIQ) has also been developed (Gay, Weiss, Hendel, Dawis & Lofquist, 1971); it assesses a person's desires for the 21 rewards. Some preliminary studies (Betz, 1969; Golden & Weiss, 1968) suggest that a good fit (defined by a D^2 measure) between MIQ and ORP for a person is related to that person's higher satisfaction at work.

The Present Research

The present paper is in the same spirit as the Wanous (1973) and Gay, et al. (1971) research efforts: The assessment of success outcomes associated with the fit of the individual's expectations and preferences to the particular organization he joins.

Both preferences and expectations were used in the present research since arguments can be made for the importance of assessing either one. On the one hand it could be reasoned that a person's expectations probably represent some modification of his preferences (wants, needs, desires, wishes). Thus, although

one would expect preferences and expectations to be correlated, expectations may reflect a modification of one's preferences based on information or hypotheses regarding the nature of the world or, in the present case, of the organization. Psychologically, then, preferences may represent the state of the person more than expectations do. One could hypothesize, then, that the fit of preferences to organizations should be psychologically more meaningful for predicting the long-term behavior of the individual because this fit is more indicative of a true person-environment interaction.

Conversely, the largest proportion of research concerned with preparing an individual for an organization or job has manipulated employee expectations in an attempt to achieve a congruence between expectations and reality; in effect to make expectations different from individual preferences. These research efforts (Wanous, 1973; Weitz, 1956) have assumed that the organization will not be what the person prefers it to be but that this is not as psychologically important as the fact that the individual is prepared for (he expects) what he finds. The evidence suggests this hypothesis to be true; people who receive realistic information do seem to stay longer, have more positive attitudes, and so forth. Based on these data one would hypothesize that the fit of expectations to organizational characteristics would be the important datum.

In an attempt to resolve these competing hypotheses it was decided (Schneider & Bartlett, 1968) to explore the role of both variables in understanding the role of matching the individual and organization in the prediction of individual success.

Method

Sample

Preference and expectation data were available on 1125 newly contracted ("new") life insurance agents, about 56 percent of those contacted. Unfortunately, although 1125 new agents completed the questionnaire (to be described below) criterion data of one kind or another (described below) were available for only 914.

Procedure

A prospective life insurance agent goes through a number of steps prior to being hired. He is tested, interviewed and may even receive pre-contract (pre-hiring) training prior to a final decision by the agency and the potential agent. The final decision to become an agent is followed by a formal contract sent by the home office to the agency for the individual to sign. When this contract was sent to the new employee to sign during January-December 1968 it was accompanied by an Agency Climate Questionnaire (ACQ) which the new agent was asked to complete and return to the researchers.

The ACQ is an 80-item, six-dimension, factor-analytically developed, organizationally descriptive questionnaire. For the present study, the newly contracted agents were asked to indicate on a 5-point scale "how characteristic, in general, you [prefer] [expect] the statement to be as a description of your new agency". With 80 items, then, respondents were required to make 160 responses.

A brief description of the six factors of the ACQ follows:

1. Managerial support - represents a personal orientation of the managers to his staff and agents; treating his employees as people. (support)
2. Managerial structure - sales and task orientation. (structure)

3. New employee concern - an agency that shows concern for the selection and training of a new agent. (concern)

4. Intra-agency conflict - refers to the presence of in-and out-groups in the agency. (conflict)

5. Agent independence - agency with agents who tend to go about their own work without paying much attention to the agency. (autonomy)

6. General satisfaction - agencies in which agents are seen as having interests in addition to selling life insurance and as being satisfied with the agency and agency management. (morale)

The internal consistency reliability estimates of these scales in the preferences and expectations response sets range from .56 to .83 (Schneider, 1972); for already employed people the estimates range consistently higher (.05 - .10 higher, Schneider & Bartlett, 1970). No re-test data are currently available. Some construct validity data show that at the individual level of analysis the measure is related to interpersonal satisfaction (supervisors and peers) but that this relationship is neither very strong nor consistent. It may be concluded that for already-employed people the ACQ is not the same as an assessment of job satisfaction (Schneider & Snyder, 1974). Details on the collection of data from the managers, assistant managers and already-employed ("old") agents may be found in Schneider (1972).

Method of Analysis

The D^2 measure of fit between preferences and expectations and the climate perceived by agency managers, assistant managers and old agents was used. D^2 was chosen because it summarizes both level and shape similarity (Cronbach & Gleser, 1953), because a comparison of D^2 and Cohen's (1967) r_c yielded correlations of around -.50 to -.60, and because inspection of the data revealed highly similar patterns of results for D^2 and r_c .

Prior to calculating the D^2 index all preference and expectation data were converted to Z-scores. In addition, all already-employed perceptions were converted to Z-scores prior to pooling of data within agencies to generate the assistant manager and old agent agency climate perceptions (since there is only one manager, no averaging was required).

Expectations and preferences were matched to manager, assistant manager and old agent perceptions because previous evidence has indicated that while there is some relationship between these sets of perceptions (Schneider & Snyder, 1974) the relationships tend to be weak (Schneider, 1973; Schneider & Bartlett, 1970).

Criterion Data

Criterion data of three kinds were available with which to correlate the "fit" data: tenure [stay 12 months or more (scored "1") vs. failure to remain 12 months (scored "0")], production (actual dollar sales for one year regardless of how long the agent stayed), and a dual criterion [stay 12 months and sell above the median for all those contracted by the company in the same calendar year who did stay a year (scored "1") or failure to meet these two criteria (scored "0")]. Obviously only half of those who stay the full year can meet the dual criterion (in the present study this amounts to 23 percent). Criterion data for 914 new agents were available for tenure, and for 661 new agents on the sales and dual criterion.

Results

Table 1 reports correlations for the fit of preferences and expectations to manager, assistant manager and old agent climate perceptions and the success criteria. Clearly the hypothesis that a better fit of the new agent to the climate of the agency results in better outcomes for the individual is not

supported by these data. Correlations calculated between preferences and expectations and the success criteria (not considering fit) showed a similar pattern of non-significant relationships.

Insert Table 1 about here

Discussion

How may this lack of ability to predict success based on fitting preferences and expectations to organizational characteristics be understood? One hypothesis is that the organizational characteristics and the kinds of preferences and expectations being assessed with the ACQ are simply not relevant for this kind of matching hypothesis. The ACQ does not assess the organizational reward properties other measures of organizational characteristics do and, since the same ACQ items were responded to by new agents, perhaps the nature of the variables they were asked to prefer and expect are not particularly relevant to them.

Thus, the ACQ assesses organizational events, practices and procedures not the kinds of rewards an individual may obtain from an organization. Conceptually, organizational conditions are at least one-step removed from the rewards people may obtain from participation in the organization. According to VIE (Valence-Instrumentality-Expectancy) theory (Miner & Dachler, 1973) it is rewards as outcomes from organizational conditions, not the conditions themselves, that lead to motivated behavior.

An extension of this hypothesis suggests that the ACQ was not relevant because the nature of the job or task new agents work at was not included. Clearly one important source of rewards is the task one works at (Hackman & Lawler, 1971; Herzberg, 1968) but this was not assessed in the present research.

Table 1
Correlations For Individual-Organizational
Fit and Three Criterion Measures

	Tenure ^a	Sales	Dual Criterion ^a
Agent Expectations Fit			
With Perceptions of:			
Assistant Manager	-02	-03	0
Manager	-01	-04	-03
Old Agents	-05	-06	-05
Agent Preferences Fit			
With Perceptions of:			
Assistant Manager	0	-03	0
Manager	01	-04	02
Old Agents	-01	-02	-02

Note - decimals have been omitted.

^aPoint-biserial correlations.

Schneider and Hall (1972) have noted the failure of many climate measures to include task variables as an important component.

There is a second possible hypothesis for failure to support the ideas underlying this research. The assumption on which research of this kind proceeds is that when a person joins a basically negative organization and fits it, this is psychologically equivalent to a person who joins a basically positive organization and fits it. As Porter and Steers (1973) note such an assumption may deny the motivational properties of organizational characteristics. That is, the assumption does not account for the properties of a "good" organization to motivate people over and above the question of whether or not his preferences and/or expectations may be fulfilled.

Although data to test this hypothesis would, it seems, be better supplied by a measure other than the ACQ (for the reasons outlined in the beginning of this discussion), data were available for a preliminary test.

Organizational Type as a Moderator

Schneider (1974) has presented some data to suggest that success in predicting the performance of an individual using individual differences measures may be a function of the kind of organization the individual joins. He showed that in particular types of organizations the probability of an individual succeeding was higher and the predictability of who would succeed was also enhanced.

These data were generated by clustering life insurance agencies on the basis of ACQ profiles and examining success rates and predictor-criterion correlations within the resultant clusters. The cluster analyses which yielded the most provocative findings were those based on old agent rather than manager or assistant manager climate perceptions. These old agent clusters will be the focus of interest here because moderating by manager and assistant manager

clusters did not indicate consistent patterns of results different from those presented in Table 1.³

Figure 1 shows the cluster profiles for four types of agencies based on old agent climate perceptions. Schneider (1974) has presented details on the analyses leading to these clusters. Suffice it to say here that the clusters are quite homogeneous with respect to the agencies comprising a cluster and heterogenous with respect to each other. Cluster four was named Disaster (N = 11 agencies and 85 new agents), cluster three Theory Y/System 4 (N = 26 agencies and 150 new agents), cluster two Typical Agency (N = 38 agencies and 280 new agents) and cluster one Conflict (N = 18 agencies and 93 new agents).⁴

 Insert Figure 1 about here

Table 2 presents the correlations for the different fit scores and the success criteria by old agent clusters when fit is calculated to the profile of the specific agency the agent joined and the profile of the cluster to which the agency belonged. Both sets of correlations are presented to see if it is necessary to know the climate of a particular agency or just the type of agency a new agent joins.

 Insert Table 2 about here

For clusters one and two the correlations are consistent with those presented in Table 1. However, clusters three and four reveal opposite patterns of correlations between the fit index and the criteria. For cluster three, Theory Y/System 4, the more the agent's expectations fit the agency he joins, the more likely he is to succeed on all three criteria (note that a small D^2 indicates good fit). In cluster four agencies, Disaster, the poorer the fit between preferences and the agency joined, the more likely the agent is to

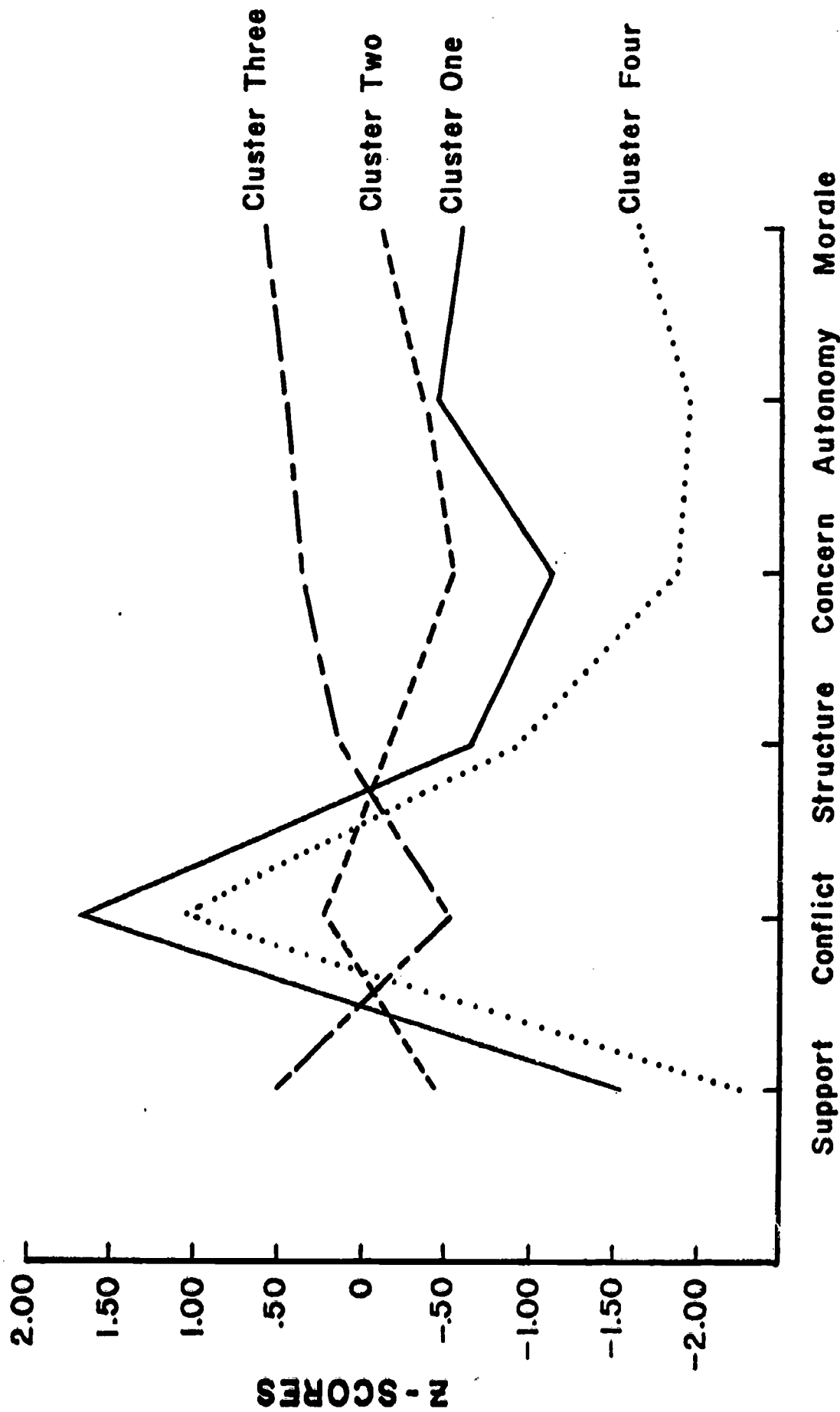


Fig. 1. Profiles for clusters based on old agent climate perceptions.

Table 2
Correlations For Individual-Cluster
and Individual-Agency Fit for
Three Criteria By Old Agent Cluster

	Correlations Based on:			
	Fit to Agency		Fit to Cluster	
	Expect	Prefer	Expect	Prefer
Cluster One (Ns = 93, 68)^a				
Tenure ^b	05	06	08	08
Sales	07	11	06	14
Dual Criterion ^b	-07	01	-05	04
Cluster Two (Ns = 280, 196)^a				
Tenure ^b	-07	-07	-04	-05
Sales	02	-01	0	0
Dual Criterion ^b	-02	-01	-01	02
Cluster Three (Ns = 150, 111)^a				
Tenure ^b	-17*	-10	-07	-03
Sales	-21*	-10	-08	-02
Dual Criterion ^b	-24*	-11	-10	-07
Cluster Four (Ns = 85, 59)^a				
Tenure ^b	-05	19 ⁺	-07	15
Sales	08	18 ⁺	06	18 ⁺
Dual Criterion ^b	09	21 ⁺	09	18 ⁺

Note - decimals have been omitted.

^aThe first sample size is for Tenure, the second for Sales and Dual Criterion.

^bPoint-biserial correlations.

* $p < .05$

⁺ $p < .10$

succeed. Correlations calculated on the basis of an agent's fit to a cluster are weaker although they follow the same trends.

Although the correlations in clusters three and four are significant, they are quite weak, making any attempt at explanation more than the usual gamble. This is particularly true in the present research since these are post-hoc analyses to begin with. Nevertheless, it may be worth the risk!

In a basically positive climate (Theory Y/System 4) a fit between expectations and organizational characteristics may relieve the individual from the demands of having to adjust to the organization and permit the positive features of the organization to determine success. Perhaps finding what he expects results in an agent expending less time and energy in adjusting to organizational life. This permits him to get on with task performance resulting in early experiences of success. These early success experiences may create a cycle of continued success (Hall, 1971). The person with a poorer fit in the same situation would enter the success cycle later or not remain long enough to profit from the positive features of the organization.

This line of thought does not help explain the findings in cluster four (Disaster) agencies where a lack of fit between preferences and reality is correlated with success. From a theoretical standpoint it is interesting to note that a good fit between preferences and reality is never significantly related to success. This supports the idea that when a person finds organizational conditions he prefers, this does not seem to have the motivational properties that the VIE theories suggest occur when an individual is rewarded with outcomes he desires. The fact that in a basically negative situation a poor fit of preferences to reality is related to success may indicate that under negative organizational conditions a person's success is more a function of what he is than what the organization is or an interaction of person and organization.

Certainly anecdotal data suggest that the effectiveness of a person in a poor situation is tied directly to the strength of his desires. However, social psychological research would suggest that the norms or patterns of behavior in a poor situation would have negative consequences for members. This may be particularly true when individual performance is in constant and close interaction with the situation. In life insurance agencies, however, the agent can be a relatively autonomous operator; under such conditions the strength of his own preferences may determine his success.

Thus in the positive organizational condition (Theory Y/System 4) what makes it positive is the attention (support, concern, autonomy) given the new agent; this attention is what new agents tend to prefer regardless of the kind of agency they join. When preferences are most clearly discrepant with a negative reality the individual himself is the determinant of success. When, however, expectations are most congruent with a positive reality, the role of the organization in success of the individual may predominate. It should be noted, however, that preferences may only be able to overcome a negative situation when job or task success is dependent upon autonomous behavior.

Of course, this reasoning is of the purest speculation. However, we seem to be reaching a juncture in organizational psychology where the understanding of human behavior at work will depend less on specifying only organizational attributes as main effects or only individual characteristics as correlates of individual performance but on a conceptual and research integration that will specify the conditions under which individual, organization, or an interaction leads to employee success (Porter, 1966). Some research already has been accomplished in this area (e.g., Andrews, 1967; Forehand, 1968; Frederiksen, Jensen & Beaton, 1972; Schneider & Olson, 1970) but more is needed before a mapping of these concepts can be accomplished. Perhaps the kind of analytic scheme presented above may be considered one step in this direction.

Concluding Note

The role of expectations as different from preferences has not emerged clearly in these data. In a sense, then, both purposes of the research described here may be considered a failure. The degree of fit of a new agent to his agency did not predict success and we are no further along in understanding which characteristics of the individual should be assessed when developing indices of the extent to which individual and organization match.

We may note that research in the past has concentrated on the role of expectations in selection to the relative exclusion of preferences (desires, wants). Recent progress with the cognitive theories of motivation (c.f., Miner & Dachler, 1973) reveal the importance of an individual's desires. Future research should investigate further the role of both expectations and preferences since the data presented here suggests that each may be relevant in different situations.

The practical implication of the moderator analysis is that simply telling a person what to expect on a job or in a job situation may enhance his or her probability of success only when the organization is a basically positive one to begin with. The idea that creating realistic expectations alone will cure the ills of a poor organization is, in retrospect, an oversimplistic wish. One wonders if the success of the creating-realistic-expectations research is not at least partially attributable to a selection factor: those organizations willing to permit job applicants to "hear or see it like it really is" may have been basically positive organizations to begin with.

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Footnotes

1. Preparation of this paper was supported by the Personnel and Training Research Programs, Psychological Sciences Division, Office of Naval Research, under Contract No. N00014-67-A-0239-0025, Contract Authority Identification Number, NR 151-350, Benjamin Schneider and H. Peter Dachler, Principal Investigators. Acknowledgment is made to the Life Insurance Agency Management Association and the company that provided the data for their considerable help. Robert Snyder, Kent Boyd and Jeff Roberts assisted with the data analyses reported herein; the Computer Science Facility of the University of Maryland partially supported the extensive data analyses required.

2. At this writing, Visiting Fulbright Scholar, Department of Psychology, Bar-Ilan University, Ramat-Gan, Israel.

3. This fact alone is of interest. It suggests that when predictions of new employee behavior are to be based on the joint effects of individual and job/organizational characteristics, perceptions of the job/organizational characteristics the new employee will encounter should be obtained from employees already in the job/organization the new employee will enter.

4. The number of new agents in these clusters is not 914 because some agencies did not fit in any cluster. This required the dropping of those new agents who joined agencies which fit no cluster; see Schneider (1974) for details.