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The Role Of Motivation In Employee Disposition And Choosing To Act Among Manufacturing Employees: A Grounded Theory Of Discretionary Effort

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THE ROLE OF MOTIVATION IN EMPLOYEE DISPOSITION AND CHOOSING TO ACT AMONG MANUFACTURING EMPLOYEES: A GROUNDED THEORY OF DISCRETIONARY EFFORT

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Managers are often tasked to accomplish more with the resources at their disposal. Doing more with less is especially associated with the manufacturing industry providing a rich and relevant backdrop for study. Understanding discretionary effort as a resource, how it manifests, and when and how manufacturing employees choose to do more than is required is key to achieving results in an increasingly competitive and evolving industry. This constructive grounded research study investigated how 25 non-salaried manufacturing employees conceptualized how and why they chose to engage in activities that were considered above and beyond job role expectations. Extant literature was considered to provide a deeper analysis of the elements identified from the participants' conversations. The influence of non-work relationships and social interactions in the workplace on employees were considered and four classifications of social capital in the workplace were introduced: seniority, hierarchical, valued/needed, and cynical. A novel theoretical model was developed to gain a richer understanding and appreciation of how hourly manufacturing employees conceptualized expending discretionary effort in the workplace. Limitations and implications for practice and research were discussed.

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AMONG MANUFACTURING EMPLOYEES: A GROUNDED THEORY OF
DISCRETIONARY EFFORT

by

Shawn M. Andrews

A dissertation submitted to the Graduate College
in partial fulfillment of the requirements
for the degree of Doctor of Philosophy
Educational Leadership, Research, and Technology
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April 2022

Doctoral Committee:

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“Try not to become a man of success, but a man of value. Look around at how people want to get more out of life than they put in. A man of value will give more than he receives. Be creative, but make sure that what you create is not a curse for mankind.” – Albert Einstein

Committing to the pursuit of a doctorate degree has been a dream of mine since I graduated with a Master’s degree nearly twenty years ago. There have been many obstacles along the path to accomplishing this goal since then, both situational and social. However, the curiosity and will to attain a higher education at a doctoral level was always there in the background. Although many assisted with my journey, there are a few people that stand out that I would like to mention.

My dissertation committee deserves first mention. David Szabla, my Dissertation Chair, kept the process on track and ensured that the rigor for accomplishing the project was intact. Dr. Josh Jordan assisted with the difficult task of ensuring that I was able to work with a company to get participants for the research on several occasions and with proofreading. Dr. Margaret Gorman provided expertise with the research method along with several words of guidance and support. Next, the participants who shared their time and experiences are very appreciated.

I hope that my journey provides an example of encouragement to continue higher education to my children, Kristen and Ryan, and my granddaughter Liliana. Finally, my fiancée Shari has provided support in various ways including ensuring that I did not lose touch with family and friends along this journey.

Shawn Andrews

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CHAPTER I

INTRODUCTION

“For present purposes, we simply assume that individual personalities choose (in a sense) the degree to which they are interested in pursuing purposive behavior.” (Leibenstein, 1978, p. 19)

Overview of the Study

Effort as an individual concept has been discussed since the development of early social science theories. For example, Talcott Parsons (1937/1968) developed the Voluntaristic Theory of Action by synthesizing works from seminal economists and sociologists such as Vilfredo Pareto, Emile Durkheim, Alfred Marshall, and Max Weber. The discussion of the theory described the method by which an individual chooses to act and considered effort a binding factor that mediates norms and conditional elements of action. Accordingly, effort is converted through action to realization of social norms. Furthermore, Parsons compared effort in social sciences to the concept of energy in the physical sciences. The metaphor of effort as energy persisted with Parsons’s contemporaries (e.g., Poffenberger, 1942; Young, 1936) and persists in current literature (e.g., Radda et al., 2015; Harter, 2020). In the workplace context, Brown and Leigh (1996) explained that effort mediates the relationship between job involvement and work performance. Employees that use energy at work to accomplish tasks that are beneficial, yet surpass their role expectations, may be said to go above and beyond the call of duty and are recognized as going the extra mile.

Many organizations tolerate employees’ abilities to choose how much energy to put into work in any given day (Harter, 2020; Kidwell & Bennett, 1993; Neumann et al., 1999; Parrey &

Bhasin, 2012). Under such conditions, some employees may surmise the minimum amount of work needed to remain occupied and decide to perform at the minimum level (Deci & Ryan, 1985). Also, technology has rendered many tasks simpler, requiring less effort from the employee (Erickson, 2005). Learning and adapting to role and responsibilities at work may give an employee extra time during the day as they acclimate to the work (Parrey & Bhasin, 2012; Yankelovich & Immerwahr, 1984). Likewise, conforming to work norms that adjust work pace to others in the same work group may socially enable the employee to work less (Benkhoff, 1997; Whyte et al., 1955). Concurrently, disgruntled employees may decide to hold back and not work as hard as much as they had in the past resulting in less output (Connor, 2012; Folkman, 2012; Trevino, 2018).

In Liebenstein's (1978) discussion of traditional, neoclassical economic theory, the possibility of a company outperforming a different yet identical company holding everything constant was considered. Efficiencies not previously delineated by traditional economic theories that preclude organizations from achieving ideal operational outputs were acknowledged and explored. The unidentified efficiencies have been shown to be more significant than inefficiencies recognized by prior theories such as microeconomic theory (Leibenstein, 1966).

The one factor not previously considered in traditional economic theories is the motivated effort of the company's individual employees. Indeed, Leibenstein (1978) identified effort as a discretionary variable in the equation of organizational success coinciding with employee motivation as the foundation of X-efficiency theory.

The simple fact is that neither individuals nor firms work as hard, nor do they search for information as effectively, as they could. The importance of motivation and its

association with degree of effort and search arises because the relation between inputs and outputs is not a determinate one (Leibenstein, 1966, p. 407).

In X-efficiency theory, effort and motivation support work contextual factors for workers including supervisors and managers. As Leibenstein (1966) pointed out “the nature of the management, the environment in which it operates, and the incentives employed are significant” (p. 401). Leibenstein (1978) also speculated that individual performance is based on individual choices that are made, influenced by motivating factors in the workplace independent of the resources available to the organization. Instead, the existence of the motivations of the work context are influenced by internal motivational structures and the organization’s external environment. Based on Leibenstein’s work, Yankelovich and Immerwahr (1983) defined the term *discretionary effort* as:

The difference between the maximum amount of effort and care an individual could bring to his or her job, and the minimum amount of effort required to avoid being fired or penalized; in short, the portion of one’s effort over which a jobholder has the greatest control (p. 1).

In the roughly four decades that have taken place since the term’s origin, discretionary effort has been introduced as part of other constructs such as employee engagement, organizational commitment, and work passion, and has been alluded to as a key to the success of an organization (Kotter, 2014; Leibenstein, 1978). Discretionary effort may be viewed as a potential resource that can be called upon by organizations when conditions warrant. For example, when an organization needs to implement a new change initiative, the organization may rely on their employees to carry out the initiative even though it does not fall within

minimum role expectations. Employees having the choice to perform the extra duties may have a significant impact on the organization's ability to succeed with the new implementation.

Understanding how employees experience discretionary effort may be very valuable to organizations, especially in a very competitive environment (Steers et al., 2004). Furthermore, organizations that are interested in tapping into discretionary effort will need "to clearly understand which factors have the greatest potential for motivating the investment of discretionary work effort by employees" (Corace, 2007, p. 172).

Statement of the Problem

A research problem may be defined as any "problematic situation, phenomenon, issue, or topic that is chosen as the subject of an investigation" (Van de ven, 2007, p. 73). In the same vein, formulating a robust problem statement may be undertaken in four main steps: situating the problem, grounding the problem, diagnosing the problem, and selecting the research question (Van de ven, 2007). The four steps assist in the development and understanding of the research problem and the domain in which it exists. The steps may overlap with each other or be accomplished in parallel during the process.

Identifying the point of view initiates the process of situating the problem. The point of view and associated interests for this research were derived directly from the hourly manufacturing workers' perspectives. The intended users and audience for the research are managers and instructors of management practices. Identifying the environment that the problem exists, or the problem domain, is the next logical step. The foreground of the problem domain is the manufacturing process, and the background is the social interactions between workers. The scope of the problem is bound by the location, industry, and organization of the study. A

qualitative research approach was chosen for the design of the study which customarily undertakes a deep view of the problem, instead of a broad view as in quantitative designs (Queirós et al., 2017).

The problem is grounded in the questions asked of research participants who are directly involved with manufacturing processes, thoroughly reviewing the relevant literature on the topic, and being reflexive by taking into account and setting any bias aside. The problem is diagnosed by taking into account relevant prior theories and models to ascertain the nature of the problem in the manufacturing context. Although there may be expectations from managers about how to motivate employees to achieve results, the research identifies breakdowns in these expectations and seeks to bridge those gaps by organizing observations from the data into categories for further analysis. Two perspectives from which to view the problem are from a practice and a research perspective.

Practice Perspective

Early in the Industrial Age, Taylor (1911) commented that there are manufacturing employees who are self-motivated and will work hard with little or no intervention from the manager, yet other employees “require an amount of thought, conscience, or pressure from management to work at full capacity” (p. 19). Although relative success has been realized by self-directed work teams, the need for a manager’s influence remains today to establish boundaries, provide organizational policies, and communicate organizational values (Druskat & Wheeler, 2004; Tait, 2020). A brief search on Amazon.com shows over 70,000 items for “management” and over 60,000 items for “leadership”. The plethora of books on how to manage or lead employees that are available is overwhelming to the say the least, and managers may

select references that may not apply to the issues with which they are faced in a particular work context.

Research Perspective

Despite the value of discretionary effort to managers who may benefit from its expenditure in practice, the value of discretionary effort has been downplayed in the academic literature. Discretionary effort has been conceptualized as a component of other constructs such as employee engagement (e.g., Shuck & Wollard, 2010; Shuck et al., 2017) or work passion (Nimon et al., 2011; Shuck et al., 2014; Zigarmi & Nimon, 2011). Discretionary effort and employee engagement have been labeled together as fads (Guest, 2014), “abstract notions” (Wilkinson et al., 2020, p. 2), or “old wine in new bottles” (Kaufman et al., 2020; Macey & Schneider, 2008; Saks, 2006; Schaufeli, 2014). While discretionary effort has been described as part of other constructs and defined in the literature, a theory that distinguishes the mechanisms of discretionary effort and establishes the concept as a sole construct does not exist.

Statement of Purpose

Industrial manufacturing workers are in an occupation where any improvement in performance can be related to financial gain. With the recent advent of manufacturing workers considered as essential workers in times of crisis, efforts of the employees in this industry will be considered vital for economic recovery for the foreseeable future (Cybersecurity & Infrastructure Security Agency, 2020, p. 20). The purpose of this study is to construct a theory to explain discretionary effort by determining the underlying assumptions, motivations, beliefs, and outcomes that underpin hourly manufacturing employees’ experiences using constructive

grounded theory methods as recognized by Charmaz (2014) and Bourdieu's (1977) Theory of Practice as a theoretical lens.

Research Questions

Researchers typically base research questions on gaps discovered in extant literature about a topic, or by challenging underlying assumptions from prior academic works (Sandberg & Alvesson, 2011). Although classic grounded theory does not emphasize a literature review before collecting data to reduce influences on the abductive process (Glaser & Strauss, 1967), the need to review literature to identify pertinent research questions is understood by contemporary grounded theorists (Charmaz, 2014; Martin, 2019). By constructing a theory of discretionary effort using constructivist grounded theory methods informed by Charmaz (2014), this study identifies existing gaps in the literature and challenges extant underlying assumptions about discretionary effort.

Three acknowledged methods of gap spotting are neglect, confusion, and application spotting (Sandberg & Alvesson, 2011). An example of neglect in the extant literature is the lack of discussion of discretionary effort as a solitary construct in the scholarly literature in the United States over the last decade. Instead, discretionary effort has been overshadowed by such constructs as employee engagement, organizational commitment, and work passion in the domestic literature. Another gap in the literature is the confusing array of interpretations of discretionary effort. Previous explanations of the concept are comprised of varying definitions, causal diagrams with antecedents (Lloyd, 2008; Morris, 2009), mathematical equations (April & Smit, 2010), or a combination of the three. The need to extend the literature to benefit both academics and practitioners is an example of application spotting.

The first assumption challenged by this study is that discretionary effort is merely an indication of other constructs such as employee engagement, organizational commitment, and work passion. The second assumption challenged by this study is that managers may assume that employees will give as little effort as possible to get what is wanted or needed (Leonhardt, 2021). The third assumption challenged by this study is that managers of hourly manufacturing employees assume that employees should willingly provide discretionary effort to benefit the organization because it is the employee's responsibility to give their all. Expectations of willingness to contribute extra hours and giving one's all at work may be influenced by the Japanese culture that provided lean manufacturing methods popular in the industry today (Harden, 2008).

Alvesson and Sandberg (2011) recommend keeping the audience of the study in mind when constructing research questions. For example, will the audience be indifferent, nonplussed, put off, or interested in what the study implies? The timeliness of the study may be a consideration since the results of the study may not coincide with other ongoing work in a particular field. Another consideration is that challenging assumptions may carry risk to upcoming authors since questioning others' work may be considered offensive, inappropriate to editors and reviewers of journals in which authors would like to be published, and currently held assumptions may be held as truths by the reader. However, authors are encouraged to take these risks because "the benefits of rejuvenating the field may be high, although the task is not an easy one" (Alvesson & Sandberg, 2011, p. 266).

A theory informed framework was utilized to identify and challenge contemporary, domestic assumptions. The framework developed in this study draws upon the constructive

grounded theory methodologies informed by Charmaz (2014), the decision-making paradigm framework of Bourdieu (1977), and supported by concepts from other theorists respected in the field (Bartunek & Moch, 1987; Markus & Zajonc, 1985; Senge, 1992). This study addressed the following overarching research question: What theory describes how and why hourly manufacturing employees expend discretionary effort? To answer the overarching question, the following questions examined discretionary effort to create a theory of discretionary effort using constructivist grounded theory methods.

Q1. What personal characteristics influence an employee to choose to expend discretionary effort?

Q2. Under what conditions do employees expend discretionary effort?

Q3. What beneficial outcomes are perceived by employees from expending discretionary effort?

Statement of Potential Significance

Situating this study in a manufacturing context is timely and significant. Manufacturing workers have recently been deemed essential workers during times of crisis, and discretionary effort may be more evident in manufacturing. Research supporting theory development to determine how discretionary effort manifests in the current work context is relevant to practitioners. As Nicolai and Seidl (2010) point out, “managerial behaviour revolves around decision making” (p. 1262). Decision making involves choices made in the work context and is composed of three components: understanding the situation, selecting a decision alternative, and legitimizing or enforcing the decision. Knowledge acquired from this study may help managers to have a better understanding of the situations their work contexts in which extra effort may or

may not be expended; to be more conscious of the decision options available to them when engaging their employees to do more; and to have a better understanding of the tactics and tools available to them support their decisions. Nicolai and Seidl related the components to practical relevance by identifying the concepts as conceptual relevance, instrumental relevance, and legitimative relevance, respectively.

Knowledge towards understanding discretionary effort exemplifies conceptual relevance in different ways such as constructing and informing new ways to express the concept. The ability to identify factors that induce discretionary effort, the concept itself, and potential beneficial behaviors that result from discretionary effort are prime examples. Likewise, knowledge of components of discretionary effort may inform practitioners on potential courses of action to encourage the practice of using discretionary effort and challenge long held assumptions about the topic. From a work context perspective, Kidwell and Bennett (1993) posited that:

A major unanswered question is the extent to which job context and group composition help shape levels of individual effort in work groups. It is important to address this question because managers as well as academics continue to emphasize that group performance can enhance or inhibit organizational effectiveness (p. 450).

However, much of the interest in recent literature has been present only in the international literature, and a focus on discretionary effort in the United States based literature is sorely lacking. Indeed, discussions in domestic literature do not differentiate discretionary effort from other effort that also may increase from motivated states, such as requisite effort either formally described in job descriptions or informally in psychological contracts with an employer.

Manufacturing organizations inherently have established rules and procedures that align with instrumental relevance. For example, employee contributions to productivity and effectiveness are routinely measured visually by accounting for quantities of products produced in prescribed time intervals to ensure on-time deliveries to the organizations' customers. Consequently, improvements in efficiencies are easily related to financial gains adding to the organization's bottom line. Additionally, this study may provide previously unknown options and a rationale for choosing actions towards encouraging discretionary effort in a work context.

At times, managers may have to explain why decisions were made, an example of legitimated relevance. Knowledge gained from this study may provide justification for decisions in the form of reference points. Pointing to findings from this study is an example. In addition, a conceptual framework, a working model for discretionary effort, and a constructed theory based on hourly manufacturing employees' responses may be immediately beneficial to managers in a manufacturing work context.

From the organizational perspective, discretionary effort can increase productivity and the chances of the success of organizational change. With a deeper understanding of what motivates the organization's employees, human resource professionals can provide insight to the organization's leadership. Human resource programs and training can be developed to focus on factors that encourage discretionary effort and can ultimately guide the future mission, vision, and values of the organization. Also, sharing findings with the participants in the study may be advantageous as the participants may be curious about why the study was conducted, may benefit from exposure to and understanding of the key concepts from the literature, and could

receive insight from the results of the study and how it applies to the employees in the workplace (Merriam & Tisdell, 2016, p. 270).

Conceptual Framework

To investigate the research questions for this study, the individual perspective was pursued, as opposed to teams, groups, or the organizational level. Additionally, two major concepts underpinning discretionary effort were identified, namely, effort and choice. The realization that an individual's decision-making process stemmed from experiences throughout one's life span was considered, especially noting the situations that an individual encounters along the journey. A theory to describe discretionary effort in the workplace therefore encompasses the sum of an employee's experiences prior to work, during work, and situations encountered at work used to decide to make a choice to expend more effort than is required.

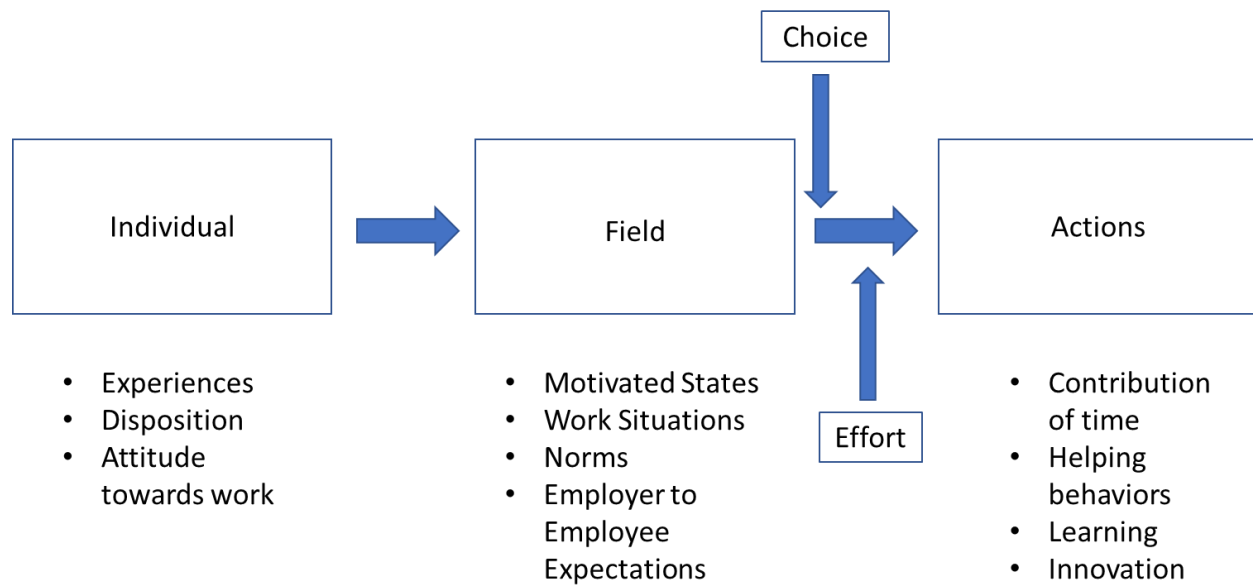
The concepts were explored through a lens informed by Bourdieu's (1977) Theory of Practice applied to hourly manufacturing employees who work in the midwestern region of the United States. The perceptions and eccentricities of an individual's personality and character is central to this study. Bourdieu called upon the concept of habitus, which refers to an individual's dispositions gained from experiences during a life span that influences choices that an individual makes. The habitus exists within determined, durable environments known as fields associated with norms and situations that may occur.

A variety of fields are experienced by employees prior to and beginning work such as home, school, sports, and church. The position of the habitus in the field and influences the individual possesses depends on the amount of capital or status the habitus has acquired and is able to wield. A child in a family, for example, has less status and influence over other members

in many matters as a parent has. The position within the field may translate to additional influence on others or with others in the field, availability of resources to the individual, and benefits associated with the individual. At work, front line assembly workers report to differing supervisors in what may be a similar relationship. Within work fields, the culture and existing practices used are evident to employees. Some practices may include motivational methods that may or may not result in employee motivated states depending on the employee.

Practices and actions stem from the development of the individual while living in and experiencing varying fields and being situated in the field of the workplace. The actions of the employees are of interest, and for this study the beneficial actions that are chosen by the individual at work that are not required is the focus. Helping others and contributing time are two examples of beneficial actions that occur in the workplace. Further explanation of the components of the conceptual framework is presented in the review of literature in chapter 2.

Informed by the insights from Bourdieu's (1977) work, the conceptual framework for this study places each concept in a temporal, linear context to show the relationships between each other. The framework will guide the use of constructive grounded theory methods as informed by Charmaz (2014) to identify categories that explore and examine how workers construct meaning about making the choices from individual experiences. The conceptual framework is presented in Figure 1.

Figure 1*Discretionary effort conceptual framework*

Note: Conceptual framework development was informed by “Constructing grounded theory” (2nd edition), by K. Charmaz, 2014, SAGE Publications Inc. and “Outline of a theory of practice” (R. Nice, Trans.), by P. Bourdieu, 1977, Cambridge University Press. (Original work published 1972).

Summary of the Methodology

The purpose of this grounded theory study is to describe the motivation of hourly manufacturing employees to initiate discretionary effort in the workplace. All the variables for this study have yet to be identified for a detailed understanding of such a complex concept as discretionary effort, substantiating the need for a qualitative approach to be used. Also, a grounded theory approach is better suited for this type of exploration as this type of research is more conducive to study in a natural setting and is open to using multiple methods including

observation, interviews of individuals or groups, and document review of available written artifacts.

The design of the study followed the prescribed design of a constructive grounded theory study developed by Charmaz (2014). Constructive grounded theory is a contemporary, updated version of Glaser and Strauss' (1967) grounded theory methodology that was developed in the late 1960's to provide validity to empirical quantitative research. Constructive grounded theory differs from prior grounded theory methods by focusing on the emergent ideas gained from participant responses, then coding and writing memos from a pragmatic viewpoint resulting in developed categories constructed into a working theory about the phenomenon under study. Additionally, Charmaz sets the method apart from earlier grounded theory methods by going deeper in the data stating that "earlier grounded theory approaches had emphasized overt actions and statements rather than covert actions and implicit meanings" (Charmaz, 2015, p. 404). In other words, constructive grounded theory peels back another layer and investigates why an action is taken instead of only analyzing the action itself.

Participants in this study were non-salaried, manufacturing employees that work for a manufacturing company in the southwest region of Michigan. Access to the site was possible through partnering with the company's research department and employees working directly with the participants, or gatekeepers (Jupp, 2006; Lavrakas, 2008) of the site. Non-salaried employees were selected as participants since the actions of non-salaried employees have a direct, measurable effect on the efficiency and output of the manufacturing processes and salaried employees may have different motivational tendencies (Neumann et al., 1999). A purposive, non-probability sampling approach, also known as judgement or selective sampling,

was used to recruit participants. This approach allows for the careful selection of participants from the levels of a manufacturing organization who may be more likely to be exposed to factors that lead to expending discretionary effort (Lavrakas, 2008). Purposive sampling grants opportunities to select those participants who will provide the most meaningful data to answer the research questions.

Interview questions were phrased to uncover and explore experiences of discretionary effort. The recommended number of participants varies by qualitative methodology and author; however, the consensus is to reach saturation, or enough participants to result in no new knowledge coming forth (Creswell & Poth, 2018; Merriam & Tisdell, 2016). For the purposes of this paper, 25 participants were interviewed, and saturation was achieved. Nineteen of the participants were male, and six participants were female.

Data for this study was collected through one-on-one, semi-structured, open-ended interviews conducted via Webex, a virtual online platform. The interview protocol consisted of an explanation of the interview steps, assurance of confidentiality, and allowed time for participants to ask questions about the purpose of the research and research process before the interview questions were asked. Participants were given time at the end of the interview to ask questions before the interview concluded. The researcher recorded the interviews using the voice recording capabilities of the Webex platform. Participants were asked open ended questions and encouraged to ask questions about the research. Notes and memos were recorded in a notebook during and after each interview. The interview recordings were transcribed and entered into MaxQDA, a qualitative research program, for analysis.

Data collected from the study was analyzed using grounded theory techniques and methods in MaxQDA. In a constructive grounded theory approach, Charmaz (2014) endorsed a constant comparison of codes and memos of data received from open ended, semi-structured interviews, which are transcribed for analysis. Notes or ideas from the comparisons formed memos for further analysis. Initial codes from the interviews were analyzed and coded using MaxQDA to determine patterns that were identified as focused codes. The focused codes were compared to other focused codes and larger segments of data. The focused codes were then analyzed and grouped into categories. Memos about the categories were written throughout the coding process and became more detailed at the category step in the process. Diagramming was employed to construct a theoretical framework constructed from the emergent categories and how they relate to each other (Charmaz, 2014, pp. 218-220).

Limitations and Delimitations of the Study

Before the research commenced, several limitations were noted. The first limitation was associated with the challenges of collecting data through a virtual platform. Challenges of connectivity were noted throughout several interviews requiring the participants to repeat answers and otherwise interrupting the flow of answers that could impede discovery. When both the researcher and participant spoke at the same time, the microphone picked up both voices simultaneously and were mixed together, resulting in a corresponding loss of data at times. For several interviews, the computer made available was not able to connect and the participants used cell phones to call into the Webex meetings, limiting the ability to observe physical movements and facial expressions that could have accentuated participant responses.

A second limitation commonly associated with qualitative research is that data is mined from people's discussions about recollections of events (Rennie et al., 1988). Hourly manufacturing employees may not be accustomed to being asked why they perform daily tasks and have honestly not thought much about it. Correspondingly, as Weick et al. (2005) explained, people may not know why they do something until asked. They may not understand or even consider making meaning of experiences until they are asked and hear the responses aloud. Gaps in memory of an event or attempts to mislead researchers may occur during interviews, but the impact on analysis is minimized using the grounded research methodologies of initial and focused coding and the constant comparative method.

A third limitation of the study is that it was assumed that all hourly manufacturing employees in the facility were not in a position to be responsible for other hourly manufacturing employees. However, it was discovered that some supervisory responsibilities have been passed down to hourly manufacturing employees. Also, the questions of the interview protocol were phrased to gain an understanding of why employees made decisions which supported the upbringing and peer influences independent of the influences of supervisory responsibilities for others in the work context.

Another notable limitation is the number of males to female workers who volunteered to participate. Further research may investigate why males tended to volunteer more frequently than females in this context. The ratio of males to females at 76% to 24% in this study may seem to be out of proportion, however the ratio of males to females in hourly manufacturing positions across the United States is approximately 73% and 27% respectively (Laughlin & Christnacht, 2017), so the results may be generalizable to gender in this specific occupation.

Several other possible delimitations are noted in this study. For example, the data is representative of only a single company producing items for a specific purpose in the midwestern region of the United States. The participants at the company may not be representative of hourly manufacturing employees in other manufacturing industries, in other regions of the United States, or in other countries. Also, it is highly possible that this company had unique characteristics in structure, culture, or practices that may not be representative of other manufacturing companies.

Definitions of Key Terms

Action. “All activities directed toward an intended goal” (Achtziger & Gollwitzer, 2018, p. 485).

Altruism. “A desire to benefit someone else for his or her sake rather than one’s own” (Batson, 2011, p. 3).

Capital. In Bourdieusian theory, capital refers to influences used to identify and acquire positions within the field and may effectively “reinforce dispositions symbolically” (Bourdieu, 1977, p. 21).

Choice. The act of deliberation and subsequent selection among two or more options or outcomes.

Discretionary Effort. Discretionary effort is a multi-faceted construct that describes the voluntary contribution of time in the form of meaningful individual presence, and intensity and duration of employee cognitive and physical energy directed towards prescribed and non-prescribed work activities intended to benefit the organization yet are beyond employee-employer obligations. This definition is informed by the concepts presented by Brown

and Leigh (1996) and Parrey and Bhasin (2012) and the definitions presented by Entwistle (2009) and Sharifizad et al. (2020) included in Table 1.

Disposition. An apparent or underlying resilient tendency or inclination to act in a certain manner in a particular situation.

Effort. Duration, intensity, and direction of cognitive and physical energy used to accomplish an action (see Brown & Leigh, 1996).

Field. Semiautonomous, structured space containing a variety of positions imposed on individuals that are defined by an associated position and an underdetermined range of influences that is, while durable, at the same time “historically dynamic and flexible” (Doblyte, 2019, p. 275).

Goal. “The end toward which effort is directed” (Merriam-Webster, n.d.) Goals are conceptions of future, desired outcomes of an action and can be personal, task related, or assigned (Locke & Latham, 1990).

Habitus. The sum of all dispositions of an individual constructed of “cognitive and motivating structures” (Bourdieu, 1977, p. 78). “A system of schemes of perception and thought” (Bourdieu, 1977, p. 18) that may be construed as “a matrix of perceptions, appreciations, and actions” (Bourdieu, 1977, p. 83).

Practice. Generative schemes that originate in the habitus. $(\text{Habitus} \times \text{Capital}) + \text{Field} = \text{Practice}$

Psychological Contract. “A cognitive schema, or system of beliefs, representing an individual's perceptions of his or her own and another's obligations, defined as the duties or responsibilities one feels bound to perform” (Rousseau et al., 2018).

Requisite Effort. In an employment context, the effort that a person uses to satisfy formal or informal job expectations thereby avoiding an employee breach of a psychological contract (see Law Insider, n.d.; Rousseau et al., 2018).

Definitions of Discretionary Effort in the Literature

A variety of definitions of discretionary effort exist in the literature. Table 1 lists several definitions of discretionary effort by author, country of origin, type of study.

Table 1

Extant Definitions of Discretionary Effort

Author(s)	Country	Type of study	Definition
Yankelovich & Immerwahr (1983)	USA	Quantitative	“The difference between the maximum amount of effort and care an individual could bring to his or her job, and the minimum amount of effort required to avoid being fired or penalized; in short, the portion of one’s effort over which a jobholder has the greatest control” (Yankelovich & Immerwahr, 1983, p. 1)
Grazier (1992)	USA	Qualitative	The difference between “the maximum level of effort you can give in a day to your work, and then compare that with the minimum level of effort that the organization would accept (a level below which you would probably be fired)” (Grazier, 1992, p. 4).
Dubinsky & Skinner (2002)	USA	Qualitative	“Performance (certain behaviors or activities) where the salesperson goes beyond the call of duty, goes the extra mile, or exceeds normal demands or requirements or expectations of the job.”
Towers Perrin (2003)	USA	Quantitative Longitudinal	“Extra time, brainpower and energy” (Towers Perrin, 2003, p. 2)

Table 1—continued

Author(s)	Country	Type of study	Definition
Lloyd (2008)	Australia	Quantitative	“The voluntary effort employees spend that lies above the minimum level of effort required in order to keep the job and is directed toward organisational goals.”
April and Smit (2010)	China	Quantitative	“Unsolicited goodwill which leads to effort over and above expected role requirements (for which they usually do not get paid, and the lack of for which they cannot be fired).” (also Entwistle, 2009).
Fine et al. (2010)	Israel	Quantitative	“feeling inspired by the organization and willingness to go above and beyond formal requirements” (Fine et al., 2010, p. 76)
Shuck et al. (2011)	USA	Quantitative	“An employee’s willingness to go above minimal job responsibilities” (Shuck et al., 2011, p. 431).
Merriman et al. (2012)	USA	Quantitative	“Task participation [effort] not enforced through rewards (no grade) or punishment (no overt penalty for poor performance)” (Merriman, 2012, p. 2777).
Zigarmi et al (2012)	USA	Quantitative	[Employee efforts expended] “on behalf of the organization, above and beyond the agreed-upon requirements” (Zigarmi et al., 2012).
Salicru & Chelliah (2014)	Australia	Qualitative	“Performance (behaviours, actions or activities) in which individuals go beyond the call of duty (“run the extra mile”) or exceed normal demands, requirements or expectations of their job” (Salicru & Chelliah, 2014, p.)

Table 1--continued

Author(s)	Country	Type of study	Definition
Mahipalan & Sheena (2015)	India	Qualitative	“Anything done without being asked” (Mahipalan & Sheena, 2015, p. 2)
Gonzales (2016)	Brazil	Qualitative	“An organizational behavior at the micro level, understood as the level of effort made by the individual, which exceeds what is minimally required by the organization, not paid by formal rewards systems, free initiative of the individual” (Gonzalez, 2016, p. 198).
Prottas & Nummelin (2018)	USA	Quantitative	“Doing more than is expected or going out of one’s way to help a coworker, customer, or patient” (Prottas & Nummelin, 2018, p. 413).
Seymour & Geldenhuys (2018)	South Africa	Quantitative Longitudinal	“Referring to doing one’s very best and putting in extra effort that promotes the effectiveness of the organisation without explicitly being rewarded for their efforts by the formal system” (Seymour & Geldenhuys, 2018, p. 3)
Redmond & Sharafizad (2020)	Australia	Qualitative	“A behaviour that is dynamic, encompasses time, intensity and direction of effort that is voluntarily given by an employee, without contractual obligation, which benefits the organisation and the employee, and involves both prescribed and non-prescribed work activities” (Redmond & Sharafizad, 2020, p. 2)

Table 1--continued

Author(s)	Country	Type of study	Definition
Sharafizad & Redmond (2020)	Australia	Qualitative	“Employees voluntarily working: (i) extra hours; (ii) harder or faster than required or reasonably expected; and (iii) taking on extra-role behaviours which cannot be contractually enforced but positively contribute to organisational outcomes” (Sharafizad & Redmond, 2020, p. 1264) and effectiveness
Sharafizad et al. (2020)	Australia	Qualitative	“Discretionary effort is a multi-faceted construct that involves the voluntary contribution of time, intensity and positive work behaviours directed towards prescribed and non-prescribed work activities that are beyond formal contractual obligations and benefit or are intended to benefit the organisation” (Sharafizad, et al., 2020, p. 52)
Kelly et al. (2016)	UK	Qualitative	“effort that is not necessarily mandated but is nonetheless invested for the benefit of a relational partner” (Kelly et al., 2016, p. 4)
Entwistle (2009)	USA	Quantitative	"Effort controlled by the organizational member, beyond that level of effort demanded by minimal, formal role requirements, which is expended to benefit the organization (and consistent with the organization's values and rules) and generally requiring of the member both behavioral and cognitive energy" (Entwistle, 2009, p. 91).

Table 1--continued

Author(s)	Country	Type of study	Definition
Morris (2009)	Australia	Quantitative	“The individual’s voluntary contribution of time, intensity and effort directed into work activities beyond what is minimally required, expected or enforceable by the organisation, in a manner that is consistent with the organisation’s goals and has, or is intended to have, a beneficial impact on the effectiveness of the organization” (Morris, 2009, p. 98).
Shuck (2010)	USA	Quantitative	“Voluntary effort directed toward organizational goals above the minimum work required” (Shuck, 2010, p. 52).
Burawat (2013)	Thailand	Quantitative	“the quantity of time and intensity per unit of time which employees choose to allocate to work that is beyond what is the minimum required or expected” (Burawat, 2013, p. 12)
Sherk (2019)	USA	Quantitative	“Discretionary effort is volitional effort that contributes to organizational goals” (Sherk, 2019, p. 9).

Chapter Summary

Chapter 1 explained the concept and background of discretionary effort and the statement of the problem; identified the overarching and supporting research questions; and provided a brief explanation of the components of the conceptual framework constructed for the study. Chapter 2 will review the available body of literature that is relevant to this study and will provide a more detailed discussion of the components, including concepts and constructs, of the conceptual framework that will guide the study. Chapter 3 will describe which methods are to be used in the study and provides an explanation of why these methods were chosen.

CHAPTER II

LITERATURE REVIEW

Topics, Purposes, and Methods

This chapter provided a review of the current literature regarding discretionary effort by recognizing the associations between effort and choice, followed by a discussion of the role of motivation as the concept's foundation, and considered the behaviors that result. Effort and choice have been the topic of scholarly discussion about the workplace since the development of early social science theories (Ach, 1935; Ladd, 1898; Lewin, 1926/1951; Parsons, 1937/1968; Young, 1936). For example, Young (1936) referred to "efforts of will" (p. 8) in research regarding the impact of monetary rewards on employee work performance. Talcott Parsons (1937/1968) developed the Voluntaristic Theory of Action from the synthesis of research by seminal economists and sociologists including Vilfredo Pareto, Emile Durkheim, Alfred Marshall, and Max Weber. Talcott's theory described the method by which an individual chooses to act, portraying effort as a binding factor that mediates norms and conditional elements of action. Furthermore, research supports the potential of binding properties and discretionary elements of effort in the workplace by suggesting that effort mediates the relationship between job involvement and work performance (Brown & Leigh, 1996). Effort has also been identified as a discretionary variable to explain the performance variance between similar companies holding all other variables of influence constant (Leibenstein, 1978).

Many jobs tolerate how much energy employees choose to put into their work (Harter, 2020; Kidwell & Bennett, 1993; Neumann et al., 1999; Parrey & Bhasin, 2012). As Leibenstein (1966) posited:

The simple fact is that neither individuals nor firms work as hard, nor do they search for information as effectively, as they could. The importance of motivation and its association with degree of effort and search arises because the relation between inputs and outputs is not a determinate one (p. 407).

Advances in technology have rendered many tasks simpler, requiring less effort from the employee to accomplish daily work tasks (Erickson, 2005). The process of learning and adapting to role and responsibilities at work may accord employees extra time during the workday as employees acclimate to the work (Parrey & Bhasin, 2012; Whyte, 1955; Yankelovich & Immerwahr, 1984). Conforming to work norms to adjust work pace to others in the same work group may also socially enable an employee to work less (Benkhoff, 1997; Kidwell & Robie, 2003; Whyte et al., 1955). Additionally, disgruntled employees may decide to hold back and not work to the extent they had in the past resulting in less output (Connor, 2012; Folkman, 2012; Trevino, 2018). Consequently, some employees understand the minimum amount required to remain employed (Deci & Ryan, 1985), and may decide to perform with minimum effort.

To accommodate employees' ability to do less, organizations have used several methods to limit the amount of effort employees may withhold. The literature is robust with conceptual frameworks that organizations have used to limit the withholding of effort such as goal setting, job enlargement, work intensification (Paškvan et al., 2016), horizontal job loading (Herzberg, 1968) and the encouragement of organizational silence (Morrison & Milliken, 2000). Based on reactance theory, Van Dyne and Ellis (2004) introduced the term job creep. Job creep described employee contributions initially perceived as outside of prescribed job responsibilities that become presumed by coworkers and leadership but are "not officially recognized by the organization" (p. 181). Other methods that corporations have used to increase productivity

involve reducing the number of workers commonly referred to as “downsizing, rightsizing, and re-engineering” (Erickson, 2005, para. 68).

However, implemented methods to curb withholding effort may disrupt the psychological contract between employer and employee potentially increasing conflict in the workplace (Rousseau et al., 2018). Additionally, the increased workload could unfortunately lead to objectionable conditions experienced by employees such as work overload (Winnubst et al, 1996; Wichert, 2002) or role overload (Rahim, 1997) and eventually may lead to withdrawal (Lee & Ashforth, 1996) or burnout (Locke, 1982; Maslach & Leiter, 1997; 2016). Ironically, methods used to limit employees’ choice to expend effort has resulted in unexpected disadvantages to organizations. For example, the cost of burnout to organizations has approximated \$190 billion a year in the United States (Garton, 2017), and has led to legislation in Europe to curb excessive expectations. For example, France enacted a law allowing employees to disconnect from technology linking them to work as part of an “always on” work culture (Beck, 2017).

The effort above the minimum required to keep one’s job and subject to employee choice is known as discretionary effort. The term was first coined by Yankelovich and Immerwahr (1983) in a discussion about the status of the American work ethic and derived from the effort variable described in Leibenstein’s (1978) X-Efficiency theory (Yankelovich & Immerwahr, 1983, p. 39). Recent research has tailored the definition to benefit the organization. For example, Lloyd (2008) defined discretionary effort as “the voluntary effort employees spend that lies above the minimum level of effort required in order to keep the job and is directed toward organisational goals” (p. 22). Seymour and Geldenhuys (2018) defined discretionary effort as

“referring to doing one’s very best and putting in extra effort that promotes the effectiveness of the organisation without explicitly being rewarded for their efforts by the formal system” (p. 3)

Machi and McEvoy (2016) described a structured approach to conduct literature reviews based on a dual approach of discovery and advocacy. Discovery consists of developing a series of claims that is supported by the literature on the research topic. Patterns in the selected literature result in complex claims that represent what is known about the topic. Advocacy involves using the complex claims from the discovery phase to develop premises upon which descriptive or implicative argument patterns are applied to develop answers to questions that initiated the literature review. The discovery and advocacy phases of the literature review are summarized by an argument statement for each phase. In other words, the argument of discovery characterizes the “if”, and the argument of advocacy is the “then” of an if/then argument. The argument of discovery for this study used the literature to answer the following questions that support the research question:

1. What extant literature describes the history of the term discretionary effort?
2. How has discretionary effort been defined in the literature?
3. How has the concept of discretionary effort been used recently?

A critique of literature is an analysis to align discovery claims so they become valid premises for the argument of advocacy. This literature review employed the basic implicative pattern of authority described by Machi and McEvoy (2016) that uses reliable sources as references that directly apply to the support of developing a theory to explain discretionary effort. Advocacy arguments answer what conclusions can be drawn from the premise from the discovery phase. The arguments are developed by critiquing the literature after selection of an implicative logic type, examining and arranging claims into premises logically, and constructing

the advocacy argument. In the following section, the method of selection of the literature about discretionary effort and corresponding themes surrounding antecedents and outcomes are discussed.

Selection of Relevant Literature Streams

Literature selection is a sampling process that includes the identification of suitable academic literature that may support answering the research question, sets clear inclusion criteria, and excludes sources not directly related to the topic of study (York, 2008). Combining seminal works with recent works and practitioner works with scholarly works creates a more rounded review. The identification of scholarly literature used to conduct a literature review was accomplished using the search function of online journal catalogs and databases available to university libraries. Journal catalogs are collections of journals centered around a certain subject area and are distinguished from databases which are collections of common data sets accumulated by an organization or government agency (Chermack & Passmore, 2005).

Proquest Central, Google Scholar, SCOPUS, and Academic Search Complete were consulted using discretionary effort as the search term and a total of 9,623 articles were identified as listed in the first row of Table 2. After reviewing applicable articles, other terms that have similar meanings as discretionary effort became apparent such as “extra effort” and “discretionary work effort.” Another search was conducted using the emergent terms. Other variances of the search terms were investigated by exchanging the word “effort” for “behavior” The international spelling of the word was included to ensure maximum inclusion of relevant articles. A list of search terms, catalogs, and databases are listed in Table 2.

Table 2*Search Results for Discretionary Effort and Related Terms*

Search term	Proquest Central	Google Scholar	SCOPUS	Academic Search Complete
discretionary work effort	5	328	5	2
voluntary effort	1149	31400	938	165
extra effort	14641	192000	1895	625
extra role effort	1	120	5	1
discretionary behavior	111	9640	186	20
extra role behavior	133	10800	406	30
discretionary behaviour	34	4020	186	6
extra role behaviour	52	3180	406	24

The articles from Proquest Central and Academic Search Complete were initially selected for this literature review due to having the option of selecting full text and peer reviewed articles.

Seminal works, works defined to be “containing or contributing the seeds of later development” (Merriam-Webster, n.d.), were identified in the selected articles and were located, read, synthesized, and cited appropriately.

Discretionary Effort Conceptualized

Contemporary Perspective

Discretionary effort has been the topic of interest to international authors (Hesketh et al., 2015; Parrey & Bhasin, 2012; Seymour & Geldenhuys, 2018; Sharafizad et al., 2020; Sharafizad & Redmond, 2020) over the last decade, but consideration as a sole construct by scholars from the United States is essentially nonexistent. The term may be found in the American literature packaged along with other constructs such as employee engagement (e.g., Shuck & Wollard, 2010; Shuck et al., 2017), performance (e.g., Curry et al., 2019), or work passion (Nimon et al., 2011; Shuck et al., 2014; Zigarmi & Nimon, 2011). For example, discretionary effort coincides with engagement in the domestic and international literature but has tended to be overshadowed.

The overshadowing occurred despite the scholarly research into discretionary effort that predated the first and seminal engagement research (Kahn, 1990; Yankelovich & Immerwahr, 1983).

Connected, several authors have defined engagement in terms of discretionary effort (e.g., Bates, 2004; Erickson, 2005; Frank et al., 2004; Macey & Schneider, 2008). The construct confusion led scholars to dismiss discretionary effort and employee engagement as fads, “abstract notions” (Wilkinson et al., 2020, p. 2), “old wine in new bottles” (Macey & Schneider, 2008, p. 6; Saks, 2006, p. 601; Schaufeli, 2014, p. 21), or merely a “marketable concept” (Meyer, 2013, p. 236).

Differences in the domestic and international discussion of discretionary effort may be significant. Conceptions of employee engagement and discretionary effort differ by country and associated national influences provide grounds for the need for the United States perspective to be clarified (Sharafizad et al., 2020; Wollan et al., 2009). As such, previous discussions around discretionary effort in the literature transcend time and location.

Claim 1 – Discretionary Effort is an Organizational Resource

Discretionary effort may be viewed as a potential resource that may be leveraged to accomplish organizational goals. For example, when an organization needs to implement a new change initiative, the organization will rely on employees to expend efforts to support the change initiative even though it may not fall within minimum role expectations (Mahdiuona et al., 2010). Likewise, employees choosing to invest additional resources outside of expected duties may have a significant impact on the organization’s ability to succeed with the new implementation. Understanding how employees expend discretionary effort may be very valuable to organizations, especially in a very competitive environment (Bos-Nehles et al., 2017; Erickson, 2005; Farber, 1983; Macey & Schneider, 2008; Rowland, 2013; Steers et al., 2004). Thus, organizations interested in tapping into discretionary effort must “clearly understand which

factors have the greatest potential for motivating the investment of discretionary work effort by employees” (Corace, 2007, p. 172).

Claim 2 - Effort is Energy

Effort, as recognized in the social sciences, has been related to the concept of energy in the physical sciences. The metaphor of effort as energy existed in early psychological texts (e.g., Ladd, 1898), persisted with Parsons (1937/1968) and his contemporaries (e.g., Lewin, 1926/1951; Getzels & Guba, 1957; Poffenberger, 1942; Young, 1936) and persists in current literature (e.g. Harter, 2020; Radda et al., 2015; Towers-Perrin, 2003). Effort has also been referred to as different types of energy. For example, effort was referred to as motivational energy in Vroom’s (1964) work and as negative energy from alienated followers (Thomas et al., 2017). Multiple dimensions of energy are also described such as an “investment of cognitive, emotional, and physical energy” (Rich et al., 2010, p. 622) and “as the cognitive, emotional, and behavioral energy an employee directs toward positive organizational outcomes” (Shuck et al., 2014, p. 240) in definitions of employee engagement. Direct comparisons to energy continue to resonate in the current literature (e.g., Radda et al., 2015; Harter, 2020). Additionally, Young related the regulation of energy expenditure to action as “directed so as to produce certain results in behavior” (p. 70).

Effort, as discussed in this study, will apply to the energy motivated employees use to fuel actions towards beneficial behavioral norms in the workplace. Thus, discretionary effort refers particularly to effort expended at the employee’s discretion towards norms that are beneficial to the organization. Parrey and Bhasin (2012) applied three dimensions to describe discretionary work effort: duration, direction, and intensity. Duration refers to how much time the employee utilizes discretionary effort, direction refers to which work behaviors are exhibited

and how often, and intensity refers to how much effort is expended in a particular unit of time. Gollwitzer (1990) concurred by adding that managers should “address questions of when and where to start acting, how to act, and how long to act” (p. 57). Similarly, Shuck et al. (2017) related the intensity of cognitive, affective, and behavioral energies as a measure of employee engagement.

Discretionary effort represents what employees positively devote towards accomplishing organizational goals and is noted to be one of the most desired outcomes of employee engagement (Shuck & Wollard, 2010). Kahn (2010) supported this concept by stating that “we know engagement mostly by what people actually do. The most clearly observable behaviors that suggest engagement are people’s efforts” (p. 21). Schaufeli et al. (2002) linked effort from engaged employees to energy by stating that “engaged employees have a sense of energetic and effective connection with their work activities and they see themselves as able to deal completely with the demands of their job” (p. 73).

Motivation and Discretionary Effort

Claim 3 – Discretionary Effort is Motivationally Based

Research has found that discretionary effort is an outcome of motivation (Deci & Ryan, 1985; Kehr et al., 2018; Parrey & Bhasin, 2012; Vroom, 1964). For example, Parrey and Bhasin’s (2012) quantitative study among telecom employees in the states of Kashmir and Jammu in India found that the motivational factors that were the heaviest weighted predictors of discretionary work effort were team-oriented leadership, co-worker support, recognition of performance, monetary benefits, work environment, and challenging (interesting) work. Further, private sector employees and public sector employees differed by which motivators predicted discretionary effort. Employees in the Indian public sector employees were found to be

motivated by factors such as job security and stability, teamwork, and service to society; while private sector employees were motivated by status, opportunity to advance, autonomy, and high pay. Similarly, De Spiegelaere et al. (2012) in a study of 893 employees from 17 different companies in the Flemish region of Belgium, found that white collar workers tended to be motivated by intrinsic motivators and blue-collar workers tended to be motivated by extrinsic motivators.

Indeed, Kehr et al. (2018) detailed several motivational theories that apply to discretionary effort. For example, Vroom's (1964) VIE (valence, instrumentality, and expectancy) theory defined motivation as a process that guides people's choices among forms of voluntary activity and described a motivational energy that can be transferred into effort, engagement, intentions, productivity, and participation. Latham and Locke (1991) developed goal setting theory based on Andreas Hillgruber and Narziss Ach's Difficulty Law of Motivation. Goal setting theory refers to setting difficult and specific goals to increase effort (Kleinbeck, 1987). However, Kehr et al. cautioned if goal setting is taken too far, goal setting can have detrimental effects such as breaking rules and other unethical behavior to accomplish goals that are excessively exaggerated or unattainable. Deci and Ryan's (1985) self-determination theory considers autonomous and controlled motivation and the interrelationships between intrinsic and extrinsic motivation. Furthermore, motivation in self-determination theory centers on autonomy, relatedness, and competence.

Keller (2017), Professor Emeritus of Florida State University, developed a model that encompasses motivation and choice to explain the direction, magnitude, and persistence of effort towards behavior. Keller described motivators of students in his ARCS-V model as the dimensions attention, relevance, confidence, satisfaction, and volition. However, as he described

the motivators, attention and relevance related to interesting work, confidence coincided with expectancy theory, and satisfaction related to being treated fairly and receiving rewards and recognition. Keller also explained that the foundation of the ARCS-V model is partially based on expectancy theory. If students believed that goals in education are valuable and attainable, motivation will presumably result. Volition was viewed as a collection of self-regulatory processes that students utilized to overcome obstacles and distractions in their lives. A practical benefit of the model is the provided step-by-step guide that highlights a focus on the motivational state of students during the evaluation of other components of the model. Low motivation was understood to be an issue for students, however, Keller pointed out that too much motivation can result in overstressed students. The ARCS-V model has also proven to be insightful outside education. Despite following a robust and proven model, the teacher or change agent must provide insight and engage in active problem solving to achieve successful results. The model also assists in the identification of strengths and opportunities for improvement in approaches to increase motivation.

Claim 4 – Volition is a Type of Motivation Core to Making and Acting on Choice

“Theoretically, a complete intentional action is conceived of as follows: its first phase is a motivation process, either a brief or a protracted vigorous struggle of motives; the second phase is an act of choice, decision, or intention, terminating this struggle, the third phase is the consummatory intentional action itself, following either immediately or after an interval, short or long” (Lewin, 1926/1951, pp. 95-96).

The two main underpinnings of discretionary effort are the concepts of choice and effort translated into taking action. For this discussion the term action is considered as “all activities directed toward an intended goal” (Achtziger & Gollwitzer, 2018, p. 485). However, discussing

choice is more complicated and centers around the concepts of motivation and volition. The theoretical constructs of motivation and volition refer to two related yet very distinct states of motivation. The first state addresses the motivational process of making a decision for a particular goal and against alternative goals. The second state involves the volitional processes of maintaining and enhancing the commitment to a goal that has been decided to be put into action (Heckhausen, 2007).

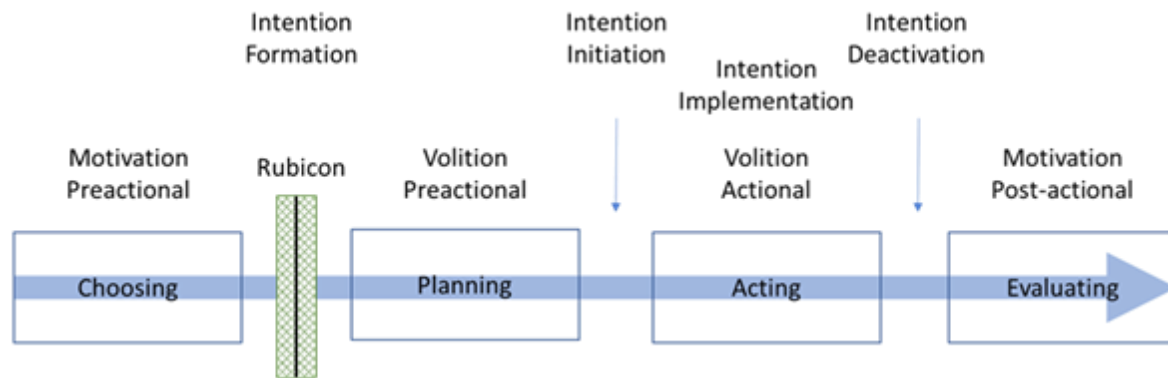
Motivation and volition have been topics of discussion for over a century by motivational psychology theorists (e.g., Ladd, 1898). For the purposes of this literature review, motivation refers to “processes of goal selection and goal setting,” while volition refers to “regulatory processes that determine which motivation tendencies are implemented, at which opportunity, and in what manner” (Heckhausen & Heckhausen, 2018, p. 13). Similarly, Young (1936) explained that “there are times when an individual is in a state of doubt or indecision concerning some course of action” (p. 214). If the state of doubt is considered as very important, deliberation is most likely to occur, which could last a few minutes, hours, or weeks. A person will typically weigh out options until one option stands out. Next, a choice is made to act on that option. To put an action into place requires a determining mindset which motivates behavior. Narziss Ach (1935), a German psychologist and university lecturer, discussed volition as a viable construct in his work in the early 1900’s, while Kurt Lewin incorporated volition into other constructs causing discussion of volition to be inhibited for decades (Kuhl, 1984). Kuhl was the first contemporary theorist to bring volition back into the scholarly limelight in the mid 1980’s (Achtziger & Gollwitzer, 2018).

Puca and Schmalt (2001) found support for action phases in a study of 93 German male university students between 20 and 38 years old. The results from the study “provided strong

evidence that different action phases can be discerned on the basis of specific information processing strategies” (Puca & Schmalt, 2001, p. 306) via voiced spontaneous responses to tasks before and after a decision-making process. Bailey et al. (2017) pointed out that the dominant stream of research on employee engagement is based on an “activated positive state of mind directed toward work tasks” (p. 34).

Claim 5 – Choice is Followed by a Commitment to Act

The Rubicon model of action phases identifies the motivational and volitional phases of a decision to act (Heckhausen & Gollwitzer, 1987) and coordinates well with the concept of discretionary effort since the model is temporally linear in nature. The Rubicon model of action phases is visualized as a temporal, horizontal path starting with a person’s wants or desires, a positive and motivated state correlating to an engaged or committed employee, committing to and taking action towards a goal, and ending with the evaluation of the action outcomes achieved (see Figure 2). The model distinguishes between when a person sets a goal and when a person acts on a goal (Achtziger & Gollwitzer, 2018). In the model, motivation is considered as encompassing “the selection of goals on the basis of their desirability and feasibility” by deliberating “on incentives and expectancies for the purpose of choosing between alternative goals and the implied courses of action” (Heckhausen & Gollwitzer, 1987, p. 103). Volition, on the other hand, is viewed as a type of or a component of motivation that is “involved in goal striving and goal striving to encompass all processes of motivational regulation that serve the pursuit of existing goals” (Achtziger & Gollwitzer, 2018, p. 490). Volition is further considered as the steps taken to realize the goal into action.

Figure 2*Rubicon model of action phases*

Note: Adapted from “Thought contents and cognitive functioning in motivational versus volitional states of mind,” by H. Heckhausen and P. M. Gollwitzer, 1987, *Motivation and Emotion*, 11(2), 101-120.

A key distinction of the Rubicon model of action phases is a reference to Caesar’s crossing the Rubicon, a river in Northern Italy in 49 BC, against orders from Rome. In a modern context, “crossing the Rubicon” refers to an individual’s steadfast commitment or point of no return. This concept is integrated into the model as “the formation of an intent, and the associated transition from contemplating to enacting options, appears to represent a psychological Rubicon, a boundary line between different states of mind” (Heckhausen & Gollwitzer, 1987, p. 120). When the Rubicon is approached in the decision process, the initial motivational state of mind of deliberating between choices is terminated, a decision is made, and the individual enters a volitional state of mind indicating that the individual has committed to achieving the goal (Achtziger & Gollwitzer, 2018). Heckhausen and Gollwitzer (1987) describe the transition between the deliberating motivational state to the planning volitional state as “a qualitative leap with respect to an individual’s cognitive functioning” (p. 103). Heckhausen and Kuhl (1985) explained that a reference check occurs right before taking that leap based on “opportunity, time,

importance, urgency, and means” or “OTIUM” (p. 136). The first phase of volition involves the “consideration of when and how to act for the purpose of implementing the intended course of action” (Heckhausen & Gollwitzer, 1987, p. 103). The role of the Rubicon in choice allows for a distinction between discretionary effort and motivated states such as employee engagement and organizational commitment. The next section discusses motivation in the workplace that may lead to motivated states and beneficial outcomes.

Motivated Effort and Outcomes in a Work Context

Multiple motivating factors in the workplace may impact energy expenditure when the factors complement or conflict with one another (Young, 1936). However, factors that motivate one person to use discretionary effort may not motivate another (Deal, 2007; De Spiegelaere et al., 2012; Erickson, 2005; Katz, 1964; Neumann et al., 1999; Organ, 1990; Parrey & Bhasin, 2012; Sharafizad et al., 2020), and what may motivate a person may change over time (Kuhl, 1986; Young, 1936). Loss of motivation over time has been referred to as “loss of interest” (Young, 1936, p. 23) in human psychology and in extreme cases is categorized as the disorder anhedonia (Gong et al, 2018). In the following section, previous research and issues for certain motivators that can be considered antecedents to motivated states and resulting in discretionary effort are discussed: work ethic, trust, autonomy, interesting work, leader support, compensation, rewards, and competition. Second, two constructs that claim discretionary effort as a dimension, employee engagement and organizational commitment, are discussed in a subsequent section. A third section identifies behaviors from an employee choosing to exert discretionary effort that positively affect the organization such as innovative work behavior, organizational spontaneity, and knowledge transfer. Also, links among and between categories are identified in the discussion.

Claim 6 – Particular Motivational Factors are Linked to Discretionary Effort

Trust

Previous research has found that employee perception of trust in the organization is a key indicator in organizational outcomes. For the purposes of this study, trust is defined as:

The willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party (Mayer et al., 1995, p. 712).

The decline in traditional employee to employer commitment has caused organizations to prioritize gaining an understanding how employees are currently choosing to contribute discretionary effort. For example, Reyshav and Sharkie (2010) discussed a decline in long-term, reciprocal commitment and job security in organizations in their study involving 329 survey participants from five different non-profit local government authorities in Australia. They found the most identifiable components of trust are if employees have been treated fairly by management and other employees, if promises have been kept and obligations met, and if promises and obligations will be fulfilled in the future. In the same vein, Zigarmi et al.'s (2018) study of 1,850 survey participants from domestic and international organizations found that trust has a direct impact on an employee's choice to exhibit organization citizen behaviors and discretionary effort. Similarly, Suadcani et al. (2014) found in a large population of hospital employees in Denmark (n = 1809), that lack of trust of the immediate supervisor was linked to absences from the workplace. Senge (1998) mentioned that trust and commitment are essential when building meaningful relationships that are beneficial for surviving stressful and difficult

times such as a changing business environment and linked the development of authentic trust to innovation.

Research has also linked trust to employee engagement. A key finding in a case study conducted by Osbourne and Hammoud (2017) was the importance of building trust with employees to improve engagement. The case study centered on four communication business leaders in Jackson, Mississippi, who possessed at least 1 year of successful employee engagement experience. One of the study's participants specifically indicated that employees are more willing to do more when supportive leadership is evident. Macey and Schneider (2008) conducted a literature review of employee engagement and revealed that trust experienced by employees is critically linked to employee behavior engagement, defined in terms of discretionary effort. Similarly, in a survey of 245 manufacturing managers in Iraq, Mohamedrasheed and Marane (2005) showed a positive relationship between trust and innovative work behavior through empowered employees' effort.

Work Ethic

Prior to the Industrial Age, farmers and craftsmen tended to work in small, autonomous groups and were fully invested in day-to-day work with all the accountability for business practices. When workers transitioned from farms and small craft shops to factories, new workers were untrained in manufacturing but needed to become effective in a short amount of time. Frederick Winslow Taylor (1911) is recognized as one of the first industrial analysts in the early 1900's who developed methodologies that focused on the contributions of the individual. One particular issue that Taylor noted was that employees who worked with others tended to slow their rate of production. Taylor's solution was to minimize employee discretion with management-led work practices, whereby management controlled all facets on the factory floor

to ensure compliance, training, and quality control (Morgan, 2006; Yankelovich & Immerwahr, 1984). Working in the industrial environment was reinforced with cultural norms such as supporting a family and fostering a sense of belonging in the community. The workers toiled hard in jobs with reduced discretion because there were few other employment opportunities available (Yankelovich & Immerwahr, 1984).

As technology has been introduced to the workplace, more workers have transitioned to white collar roles and the service industry. Educational levels have also increased resulting in workers having more freedom in job selection (Yankelovich & Immerwahr, 1984). As employees gained more discretion with the amount of effort they expended in their jobs, employees had the ability to choose to do less, leading to the questioning of the quality of employees' work ethic.

Yankelovich and Immerwahr (1984) defined work ethic as "a cultural norm that attaches a positive moral value to doing good work for its own sake" (p. 64). In the beginnings of the Industrial Age, Taylor (1911) commented that "there are employees that are self-motivated and will work hard, but other employees require an amount of thought, conscience, or pressure to work at full capacity" (p. 19). However, for the notion relating a lack of work ethic to withholding discretionary effort, there is empirical evidence to the contrary. Yankelovich and Immerwahr (1984) defended the American work ethic with empirical data from a survey of 845 American workers conducted by the Public Agenda Foundation in 1982. The analysis of the data supported that work ethic is strong in Americans, but that workers tend to use discretionary effort when management leads in positive and constructive ways. Alternatively, Grazier (1992), author and founder of Team-building, Inc., posited that people may use their effort towards outside activities if there is no evident and acceptable outlet at work.

Interesting Work

Research exists that focuses on the influence of interest on self-regulation of motivation of individuals. Sansone and Smith (2000) summarized studies and research previously completed, defining interest “as a phenomenological experience involving both cognitive and affective components. Attention is directed and focused, and the general affective tone is positive” (p. 345). Motivation to act at a point in time was found to depend on how interested individuals are and the level of enjoyment received from the activity. Additionally, interest was identified as a motivator that leads to continued persistence of action and engagement.

An individual goal may have different motivational potential due to its interest from person to person or within individuals temporally (Sansone & Smith, 2000). If a goal is not inherently interesting, at times individuals will willingly use tactics to make the task more interesting. Individuals may also use strategies that may temporarily affect performance to make the task more interesting, including discussing the task with a peer. The peer discussion may result in knowledge transfer that may induce more interest resulting in more motivation in the future. Also, motivation to reach a goal and increased interest the goal together may be helpful in effectively performing routine tasks.

There are differences between individuals when self-regulating interest in activities and in what context they may do so. Autonomy and choice may affect interest indirectly when individuals have flexibility to perform an activity in a way that motivates them. Factors that may be interesting to one person may not be interesting to another person or may be interesting to a person at different points in time. When deciding to promote intrinsic motivation or extrinsic motivation, the person, the nature of the activity, and the context in which the activity is being accomplished needs to be considered. Sansone and Smith (2000) also pointed out that interested

individuals take an active role in their own motivation and are not simply waiting for managers to provide the correct context for motivation to flourish. With repetitious jobs, individuals may change the interest level of tasks by setting personal goals that make the tasks more challenging, focus on what makes a task interesting, and use time to socialize with other workers. Also, the belief that the activity is meaningful and has value appears to be an important part of self-regulation of interest.

Researchers also offer ideas on fostering discretionary effort by concentrating on interesting work. Grazier (1992) posited that involving employees in work that is more interesting would potentially increase effort. Benkhoff's (1997) research of 182 postal employees surveyed in the branches of a German high-street bank found that intrinsic factors such as positive disposition towards work, high work standards (work ethic), and interesting work also contributed to extra effort. In a similar vein, Nordin's (2012) research with 169 academic staff selected by stage and cluster sampling from the main and branch campuses of Universiti Teknologi MARA (UiTM) throughout Malaysia were given a 40-question questionnaire that led to the finding that providing interesting work is linked to organizational commitment. Similarly, Brown and Leigh's (1996) survey research of 290 salespersons from four different companies found a positive relationship between employee productivity and when the employees felt that the work was meaningful.

Interesting work has been shown to translate to innovative work practices. In a study of 165 employees from two South Korean manufacturing companies, Shin and Jung (2019) used components of self-determination theory to explain different types of motivation that explain worker motivation: controlled extrinsic motivation, intrinsic motivation, and autonomous motivation. Job crafting, which refers to spontaneous and unsupervised changes in a job's tasks

and informal work redesign as a result of an employee's personal initiative, was the focus of the study. Shin and Jung linked motivation from job crafting to employees supporting an organization's need to be competitive. The study's conclusions included a description of job crafting as an activity that allows for employees to perceive their roles in a more interesting light by modifying the job to align with individual interests.

Autonomy

Lloyd (2008) explained that autonomy in a work context is considered as "freedom on how to execute one's tasks" (p. 31). Without autonomy, all job tasks would be prescribed, inhibiting the practice of discretionary effort. Autonomy was found to be a strong predictor of discretionary effort in a study conducted by Lloyd with 900 retail employees in Australia. Similarly, Reychav and Sharkie (2010) discovered that employee participation in decision making and contributions from autonomous employees were strong indicators of extra role behavior. Concurrently, De Spiegelaere et al. (2012) identified autonomy as a strong mediator of innovative work behavior.

Autonomy is a key dimension in self-determination theory developed by Deci and Ryan (1985). When people are working autonomously, workers select desired outcomes and how to achieve them. Regulation through choice is characterized by flexibility and the absence of pressure. In contrast, being controlled is characterized by greater rigidity and the experience of being required to do what one is doing. In motivational terms, internal motivational factors are always involved in intentional behavior. Intentional behavior can be regulated in two qualitatively different ways: the behavior can be flexible and self-regulated or regulated or controlled by others. Autonomous regulation is facilitated when events and contexts have an autonomy-supportive functional significance, and controlled regulation is promoted when events

and contexts have a controlling functional significance. Autonomy-supportive events are defined as instances that encourage the process of choice and the experience of autonomy. The one type of event that both fits the definition and has been shown, on average, to enhance intrinsic motivation is the opportunity to choose what to do.

Events that are more autonomy supportive seem to promote creativity. Deci and Ryan (1987) found that employees with autonomy-supportive managers have a higher level of trust and more positive attitudes. Subordinates with control-oriented managers had less trust in the corporation and its top management than with autonomy-supporting managers. When contextual factors function to support autonomy rather than to control, people tend to be more intrinsically motivated, creative, cognitively flexible, trusting, positive in emotional tone, and healthier. Employees also tend to have higher self-esteem, perceived competence, and preference for choice. In addition, employee behavior tends to be appropriately persistent, less controlling, and less aggressive.

Deci and Ryan (1987) explained that autonomy-supportive events and contexts facilitate self-determined or autonomous activity, entailing an inner endorsement of one's actions, or a sense that actions are emanating from within. Such activity is regulated more flexibly, with less tension and a more positive emotional tone. Additionally, the flexible use of information often results in greater creativity and conceptual understanding. When self-determined people experience a greater sense of choice about their actions, the actions are characterized by integration and an absence of conflict and pressure. Control, whether by external forces or from within the individual, entails regulatory processes that are more rigid, involve greater pressure and tension with a negative emotional tone, and result in learning that is more role oriented and less integrated.

Leader Support

Leaders tend to be stricter when business is lean or otherwise troublesome as experienced in the last decade. Articles are available in the literature defending leaders that practice hard tactics and justify doing what is necessary to get business back on track (Dyczkowska & Dyczkowski, 2018; Harms et al., 2018; Rast et al., 2012). The effects of this tactic take a toll on employees and eventually organizational effectiveness as employees hold back their discretionary effort just enough to keep their positions. Instead, Grazier (1992) encouraged leaders to learn how to interact positively with their employees, internalize and embrace supportive skills, apply the skills, allow leaders throughout the organization to use the skills, and observe and react accordingly to the employee's response. Xu and Thomas' (2010) research of 722 employees of a large, New Zealand based insurance company supported this concept by stating "leadership that provides a supportive, trusting environment allows employees to fully invest their energies into their work roles" (p. 401).

Discretionary behaviors have been linked to supportive leadership. Schweizer (2006), an assistant professor in the Clinical Neuropsychology Department of the Vrije Universiteit Amsterdam in the Netherlands, developed the Novelty Generation Model that links supportive leadership to innovation by providing awareness of strategies to combat obstacles to employees' creativity from a neuropsychological perspective. Janssen's (2005) research with 178 non-management employees in a Dutch company in the energy industry showed that supportive leadership is linked to a higher rate of employees participating in innovative activities. Research conducted by de Vries et al. (2010) of 279 employees of the Dutch Ministry of Education, Culture and Science determined leadership communication and leader outcomes are mediated by leadership styles. Similarly, Macey and Schneider (2008) linked leader support to trust when

explaining employee engagement. Osbourne and Hammoud (2017) presented the concept that leaders who are interested in implementing employee engagement strategies must “develop good listening techniques, be fair, have and demonstrate respect, build trust, and understand the employees’ concerns” (p. 60). Ramamoorthy et al.’s (2005) research of 204 Irish manufacturing employees who participated in a survey posited when employees perceive that the employer is meeting reasonable obligations to the employee, “they are more likely to perceive an obligation to engage in discretionary and voluntary behaviors that may be of benefit to the organization” (p. 144). Employees may not engage in discretionary behaviors if the perception is that the organization has fallen short of obligations to employees since discretionary behaviors are not required for the role.

Many benefits have been linked to employees that use individual strengths at work. Tomkovick and Swanson’s (2014) research of 178 marketing alumni who graduated between 1992 and 2012 from a medium-size public university in the midwestern United States and participated in the Strengthsfinder survey developed by Gallup. The survey found that employees who used their strengths at work had a significantly higher quality of life, commitment to the organization, and job satisfaction, while having a significantly lower intent to quit the job. Tomkovick and Swanson recommended that organizations should provide information to potential hires to clearly evaluate their person–job fit before a position is offered. Considering the unique strengths the new hire has and enabling the employee to use them may result in leading to job satisfaction and commitment. Brook (2013), co-founder and director of Strengths Partnership Limited in Wimbledon, United Kingdom described a different approach to performance reviews based on the analysis of longitudinal data over a seven-year period that focused on the strengths of the individual instead of shortcomings. Traditional performance

reviews tend to focus on what was not accomplished during the review period and could reduce the amount of discretionary effort the employee chooses to use. A benefit of utilizing a strengths-based assessment model is to place individuals in positions that are mutually beneficial to the employee and the organization. The employee could focus on strengths to be able to reach organizational and personal goals as well as receive guidance to future career goals and advancement. A strengths-based performance appraisal emphasizes a positive method which many employees would benefit from and could maintain or improve the likelihood of an employee's choice to use discretionary effort (Brook, 2013). Nordin (2012) also found that charisma and leadership support through attention to individualized development is linked to organizational commitment and very helpful during organizational change.

Soria et al.'s (2015) study included 5,111 students at a Midwestern college who participated in an online survey before starting their first year of college. First year students participated in activities aligned with the top 5 self-identified strengths during their first semester, and 1,493 first year college students took an assessment after their first semester. Soria et al. found that students who participated in the assessments had a higher retention into a second year in college than students who did not participate. However, other factors were found to have a higher impact on retention rates, including GPA and in-state residency. The factor that had the most impact was strengths-based discussions students had with advisors, career counselors, and peers. Overall, the authors found that students who were made aware of their strengths focused on the positive instead of negative aspects of college life. An increased success in social interactions with others who were also aware of their strengths and what they had to offer the university community was evident from the study.

Managers who contribute time in the form of meaningful presence has been shown to increase discretionary effort. Curry et al.'s (2019) research of 48 undergraduate students who answered survey questions in a laboratory setting showed a positive correlation between taking time to get to know the participant (rapport building) and the participation in tasks that were not required to participate in the study (discretionary effort). Discretionary effort measures were based on if the participant accessed an optional online survey, the number of questions answered on the optional survey, the duration of time spent on the optional survey (in seconds), and answer length (total word count) for each question on the optional survey. Results from the study indicated that participants in the rapport-building group completed significantly more of the productivity tasks than participants in the control group. Participants in the rapport building group answered a higher percentage of the survey, spent marginally more time completing the survey, and wrote more words to answer the survey question. This study illuminated the fact that organizational behavior management researchers have not clearly defined discretionary effort. However, the positive correlation between rapport building and discretionary effort “suggests that discretionary effort is mutable and worthy of further study” (Curry, 2019, p. 222).

Compensation

Compensation has long been considered a motivator (Gerhart et al., 1995; Katz, 1964; Yankelovich & Immerwahr, 1984). Compensation is “at the heart of the employment relationship” (Gerhart et al., 1995, p. 2) as the primary source of income for employees and a significant factor among the costs of doing business. However, compensation has been noted to be a confounded motivational variable worth further study (Herzberg, 1966; Kehr et al., 2018). For example, the participants in Osbourne and Hammoud's (2017) case study in Jackson, Mississippi, differentiated compensation as the expected outcome of work while job stability and

work-related benefits like medical and life insurance are weighted heavier when considering benefits from the job. One participant in the study linked discretionary effort to compensation by describing employees who strived for additional responsibilities due to an increased likelihood to be rewarded with greater compensation and the opportunity for future advancement. Gerhart et al. (1995) added that a compensation method that works for the individuals of one organization may not work for another and ideally should coordinate with other human resource activities and overall business strategy.

However, Erickson (2005), the executive officer and member of the board of directors of the Concours Group, in a presentation to the U.S. Senate Committee on Health, Education, Labor and Pensions cautioned that more money by itself does not assure an increase in employee engagement. Also, according to equity theory, employees may appraise their level effort by what they receive in return compared to how others are compensated in the organization and may choose to increase or decrease individual effort accordingly (Gerhart et al., 1995). At times, employees have been known to disregard opportunities for more compensation for easier workloads, especially when working within a piece rate compensation system (Whyte, 1955).

Rewards

Another extrinsic motivator attributed to work performance is rewards. Haines and St-Onge's (2012) research of 312 employees of companies with 200 or more employees in Quebec, Canada who participated in a survey found that rewards and recognition directly affected employee engagement and performance. Examples of rewards and recognition in the survey included individual recognition at meetings, a note in a company newsletter, and various gifts of differing value. Rewards and recognition systems that were put in place in Osbourne and Hammoud's (2017) Jackson, Mississippi study included gift cards, raffle drives, and nonfinancial

rewards including an employee-of-the-month parking space. “The atmosphere became more harmonious, thus creating a sense of work enjoyment amongst employees” (Osbourne & Hammoud, 2017, p. 55). The outcome relates to expectancy theory, which explains that employees may work harder when they expect a correspondingly valuable reward (Vroom, 1964). Other examples of rewards include events such as verbal communications or feedback for competence or accomplishment, a demand, a deadline, or an opportunity for choice.

Research has shown that rewards and innovative work behavior (IWB) are positively related. In a content analysis study of 27 peer-reviewed journal articles, Bos-Nehles et al. (2017) explained “however, when employees are not intrinsically motivated to engage in IWB, but rather perceive IWB as an extra-role behaviour, they expect to be rewarded for such extra effort” (p. 1234). Janssen (2000) also found that when employees perceive that their efforts are fairly rewarded, employees are willing to innovatively respond to increased demands at work. People may tend to view rewards as controlling since rewards are typically used to incentivize people to do things they would not normally choose to do voluntarily, thereby undermining intrinsic motivation and supporting extrinsic motivation. Additionally, when behavior is influenced by rewards, the behavior tends to persist only when rewards are present (Deci & Ryan, 1987).

Competition

Competition has long been a confounded topic in motivation theories as either a positive or negative behavior or a situational or dispositional characteristic (Abra, 1993; Allscheid & Cellar, 1996; Harris & Houston, 2010; Houston et al., 2002; Kohn, 1986; Murayama & Elliot, 2012). Competition may be defined as “rivalry between two or more persons or groups for an object desired in common, usually resulting in a victor and a loser but not necessarily involving the destruction of the latter” (Dictionary.com, n.d.). The advantages and disadvantages of

competition have been discussed in the literature oftentimes to contrast against one another (Murayama & Elliot, 2012). Research has shown that competition may motivate some employees via physiological and psychological activation resulting in more effort and better results (Deci et al., 1981; Steinhage et al., 2017). Also, Murayama and Elliot (2012) found that competition in the workplace leads to performance approach or performance avoidance goals which may result in facilitating or undermining performance respectively.

Many companies encourage competition between employees for tangible items such as “recognition, bonuses, and promotions” (Steinhage et al., 2017, para. 1) with the expectation that the organization may outperform other organizations through employee innovation (Kohn, 1986). When competition arouses excitement in an employee, innovation is more likely. However, when anxiety is aroused, unethical behavior becomes more of a possibility. Unethical behaviors that may result from competition include taking credit for someone else’s work, cutting corners, and sabotaging colleagues. Antisocial behaviors such as aggression, mistrust, and being overly dramatic and emotional are other possibilities (Deci et al., 1981; Steinhage et al., 2017). In a study of 324 undergraduates (187 females and 137 males) aged 18 to 24 years, Luchner et al. (2011) found that overt narcissism was significantly related to competitiveness. As a general personality characteristic, narcissists exhibit self-absorption and sensitivity to slights, while overt narcissism is typically displayed through externalizing behaviors, arrogance, inflated self-esteem, aggressiveness and grandiosity (Luchner et al, 2011). Overt narcissists “enjoy competition and seek out competitive social environments” (p. 781).

Deci et al. (1981) found in a study with 80 undergraduate college students, that competition and its subsequent reward of winning is extrinsically motivated using a spatial relations puzzle called a Soma cube and face-to-face interviews. Franken and Brown (1995)

found that people select competitive situations for different reasons using the Competitiveness/Mastery Questionnaire, a 27-item questionnaire. The survey participants were undergraduate university students, 151 males aged 18 – 35 and 335 females aged 17 – 52. The survey results classified participants as those who competed for motivation to exert more effort to improve their performance or to simply win.

Overall, for the purposes of this study, competition may be classified as an extrinsic motivator that may be employed in moderation constructively. Also, encouraging striving for improvement individually may be advantageous (Abra, 1993; Kohn, 1986). “One powerful example is for leaders to encourage employees to use their signature strengths in a way that benefits others as well as themselves” (Steinhage et al., 2017). When contrasted to the other motivators in this section it is important to keep in mind that “we do best at the tasks we enjoy. An outside or extrinsic motivator (such as money, grades, the trappings of competitive success) simply cannot take the place of an activity we find rewarding in itself” (Kohn, 1986, p. 59).

Claim 7 – Motivational Factors Enable Motivated State Constructs

Employee Engagement

Research linking discretionary effort to employee engagement is in abundant supply. For example, Corace’s (2007) research that analyzed a database of 115,000 Johnson & Johnson’s global employees’ Credo Survey responses concerning innovation in the workplace, described employee engagement as a measure of how committed and passionate the employee is to the company’s vision and values. The survey showed that most employees were in the middle of the range when it comes to engagement. Corace labeled the group of employees that worked under the radar, only performing as required, or that choose to hold back from giving their maximum effort in an organization the “Quiet Majority” (p.171). The “unrealized/latent potential” (Corace,

2007, p. 171) is described as discretionary effort and Corace linked discretionary effort to employee engagement. Seymour and Geldenhuys' (2018) research based on a survey developed by the Corporate Leadership Council in London, England also described employee engagement as "the degree to which employees demonstrate discretionary effort" (p. 3). Similarly, Erickson (2005) described an engaged employee as an employee that "expends discretionary effort to help accomplish the goals of the enterprise" (para. 71) and is "motivated to go above and beyond what the job requires" (para. 71).

Employees are anticipated to give more discretionary effort when they believe that their leaders are committed to them. The extra effort results in a higher likelihood of achieving other beneficial organizational outcomes including higher financial returns and retention (Corace, 2007). In the Johnson & Johnson Credo survey, employees saw immediate supervisors as being responsible for the employees' satisfaction with their work. Employees also looked to upper management to be responsible for the company's openness towards having a high degree of job satisfaction and making it part of the company's culture (Corace, 2007).

Dash's (2013) analysis of Gallup Management Journal survey of U.S. workers and Aon Hewitt Engagement 2.0 survey data from 2010 developed a slightly different definition for employee engagement. Employee engagement as a concept includes the constructs of "job satisfaction, organizational commitment, belongingness, organizational citizenship, and employee involvement" (Dash, 2013 p. 91). Dash pointed out that human resource initiatives aimed at improved training and development as well as efforts toward improving organizational culture and community should be started at the same time in order to receive the best results.

A survey developed by the Corporate Leadership Council based in London, England was based on six dimensions namely: "discretionary effort, rational commitment, emotional

commitment, communication, perceived supervisory support and perceived team support” (Seymour & Geldenhuys, 2018, p. 6). Results from the survey showed that work team discussion had a positive impact on employee engagement. Xu and Thomas (2010) also found that employee engagement is linked to trust, autonomy, and leader support.

Employee engagement has been linked to discretionary effort in public service occupations such as law enforcement. Hesketh et al.’s (2015) research of 148 members of a provincial police force in England that participated in a 46-question survey found that employee wellbeing contributed to employee engagement and was shown to unlock discretionary effort. A survey instrument identified as a shortened stress evaluation tool (ASSET) to measure well-being was paired with a seven-item author developed instrument to measure discretionary effort. The survey was administered using a Sharepoint platform. Employees felt that they were more likely to offer discretionary effort under the conditions of better control (autonomy), good job conditions, job security, and minimized change for the sake of creating change (discrepancy). The authors support that as much as 50% of employee effort can be considered discretionary. If put in play, the additional effort could significantly contribute to an organization’s success.

Employee engagement has been linked to employees’ emotional state. Robertson, author, founding director of Robertson Cooper Ltd., and Emeritus Professor of Work & Organisational Psychology at The University of Manchester and Cooper, co-founder of Robertson Cooper Ltd. and Professor of Organizational Psychology and Health at Manchester Business School showed that practitioners and researchers tend to view employee engagement through a lens of organizational attachment, commitment, and citizenship (Robertson & Cooper, 2010). The concepts focus on aspects of engagement and are linked to driving positive employee behavior. Likewise, positive employee behaviors are more likely to lead to more effective performance that

relate to benefits to the organization. The authors also propose an alteration to the typical view of employee engagement to include psychological well-being. Employees that perceive having a purpose at work and having positive feelings about the workplace was considered attaining the concept described as full engagement. However, measuring engagement is only one step towards improvement. The authors recommended that the organization provide time to create action plans from the issues identified from survey results and provide sufficient funding to ensure action plan resolution. Alternatively, Erickson (2005) cautions that a lack of employee engagement is responsible for reduced “immeasurable energy, innovation, and drive” (para. 66) in organizations.

Research has established links between employee engagement and discretionary behaviors. For example, Bailey et al. (2017) conducted a narrative synthesis of 214 studies on employee engagement and found a direct link between engagement, innovative work behavior, organizational citizenship behaviors, and knowledge transfer. The encouragement of autonomy and authentic leadership were two key recommendations to promote employee engagement. Although the authors didn’t use the term discretionary effort in the analysis, the term vigor was used to describe the energy that results from employee engagement. Schaufeli et al. (2002) described vigor as “characterized by high levels of energy and mental resilience while working, the willingness to invest effort in one’s work, and persistence even in the face of difficulties” (p. 74).

Organizational Commitment

Radda et al. (2015) defined organizational commitment as “attitudes, obligatory feeling and/or devotion to one’s organization” (p. 2) based on a model from O’Malley (2010) that described commitment as a construct of five different aspects: afflictive, associative, moral,

affective, and structural. Organizational commitment utilizes discretionary effort in different models of the construct. The Organizational Commitment Questionnaire is a commonly used instrument used to measure organizational commitment encompassing the dimensions desire to stay, extra effort, and identification with the organization (Benkhoff, 1997, p. 1). Benkhoff's research of 182 postal employees in branches of a German bank discussed how each dimension of the questionnaire related to the other two. Discretionary effort stood out from the other two dimensions in Benkhoff's (1997) study by not relating linearly to the other two dimensions, establishing discretionary effort as an individual construct. However, Benkhoff offers that social exchange theory suggests a more comprehensive explanation of discretionary effort than organizational commitment on the basis that employees tend to work harder when more rewards are offered. Workers may also give more at work for other reasons such as how employees interrelate with other workers and workplace norms, if individually driven to perform at a high level, having a positive attitude about work, and having interesting work.

Shin and Jung (2019) found that employees who exhibit autonomous motivation and intrinsic motivation as opposed to controlled motivation measures from management are more likely to show high levels of organizational change commitment. Managers were recommended to focus on how to improve the work environment to promote autonomous motivation from both intrinsic and extrinsic perspectives. On the other hand, controlled extrinsic motivation was found to be negatively related to positive organizational behaviors as job crafting behavior and not associated with organizational change commitment. Also, employees with controlled extrinsic motivation were found to tend to respond to changes in the organization with the least amount of effort. The findings in the study suggested that it would benefit the organization if management

explained the business rationale behind organizational change, resulting in employees finding additional interest in roles and responsibilities autonomously.

Claim 8 – Discretionary Behaviors are Motivated Actions from Discretionary Effort

Innovative Work Behavior

West and Farr (1990) defined innovation as “the intentional generation, promotion and realization of new ideas within a work role, group or organization” (p. 3). In a 35-article literature review seeking to link HRM practices and innovation, Seeck and Diehl (2017) explained that creativity is at the core of innovation, but creativity and innovation are two separate concepts. Instead, innovation can be referred to as “a successful implementation of creativity” (Seeck & Diehl, 2017, p. 4). Similarly, Schweizer (2006) referred to innovation as “something that is judged as new” (p. 166) from a social perspective and referred to innovative performance as the social recognition or judgment that something created is truly innovative. Innovation is certainly valued in organizations that are viewed as successful by offering new products to consumers before other organizations (Bos-Nehles et al., 2017; Schweizer, 2006; Shin & Jung, 2019). Innovation from an employee perspective is valued also and can be used to assist in the creation of new products and creating new ways of accomplishing tasks in the workplace (Shin & Jung, 2019). Also, Corace (2007) related innovation to discretionary effort by stating that “innovation prevails when people reach deep inside to stretch for that extra effort (mental and physical) to produce extraordinary outcomes” (p. 172).

Janssen’s (2000) research of 170 randomly selected Dutch food manufacturing workers with different responsibilities of the operation who participated in a survey defined innovative work behavior (IWB) as “the intentional creation, introduction and application of new ideas within a work role, group or organization, in order to benefit role performance, the group, or the

organization” (p. 288). Janssen operationalized IWB as a discretionary behavior that is effort focused to produce new and beneficial results. Bos-Nehles et al. (2017) similarly defined innovative work behavior as “the intentional behaviours of individuals to produce and implement new and useful ideas explicitly intended to benefit the individual, group or organization” (p. 1232) and linked IWB to discretionary effort. Ramamoorthy et al. (2005) also described innovative work behaviors as discretionary behaviors and explained that an employee’s choice to engage in IWBs may be the result of intrinsic motivations of employees.

Several examples in the literature have established links from several motivators to innovative work behavior. Yidong and Xinxin’s (2013) survey research of 302 administrative employees from two multi-national companies in China showed that individual innovative work behavior was positively related to individual perception of ethical leadership and individual intrinsic motivation mediated the relationship. Findings from the study suggested a link between discretionary effort and innovation when leaders “stimulated employees to unleash their potential...” (Yidong & Xinxin, 2013, p. 451). The study expanded the literature by focusing the impact of intrinsic motivation to IWB, particularly, “to find interest from the work and work for the sake of the work itself rather than the external rewards” (Yidong & Xinxin, 2013, p. 451).

Autonomy has also been linked to innovative work behavior. “Providing employees with autonomy in their jobs does seem to consistently be one of the very best practices for boosting IWB and can therefore be viewed as a crucial practice in improving the IWB of employees” (Bos-Nehles et al., 2017, p. 1240). Ramamoorthy et al. (2005) also found that autonomy and compensation were direct influences of innovative work behavior with autonomy being the strongest influence of the factors measured. Also, when employees perceived that the

organization rewards their effort and discretionary behaviors fairly, they are more likely to engage in discretionary behaviors.

Organizational Spontaneity

Organ et al. (2006) defined organizational citizenship behavior as “individual behavior that is discretionary, not directly or explicitly recognized by the formal reward system, and in the aggregate promotes the efficient and effective functioning of the organization” (p. 3). Organ (1997) further refined his definition of organizational citizenship behaviors to include “performance that supports the social and psychological environment in which task performance takes place” (p. 95). Smith et al.’s (1983) research of 422 employees of 58 departments of two banks of a large midwestern city, showed that organizational citizenship behavior was based on altruism and general compliance. The study also explained that discretionary effort is a part of the organizational commitment construct and linked to organizational citizenship behavior along with leader support. Lloyd (2008) also found that certain organizational citizenship behaviors are outcomes when employees exert discretionary effort.

The discretionary effort portion of the organizational citizenship behavior construct consists of the action-oriented behaviors of the construct (Organ, 1990). George and Brief (1992), professors at Texas A&M University and Tulane University respectively, termed the subset of behaviors organizational spontaneity. The term originated from Katz’ (1964) work with motivation and organizational behavior. Katz described three essential behaviors that successful organizations must have: people must be recruited and be retained by the organization, the employees must be competent in fulfilling the requirements of their roles, and “there must be innovative and spontaneous activity in achieving organizational objectives which go beyond the role specifications” (Katz, 1964, p. 132). The third behavior was considered essential because

organizations are unable to plan for every contingency in the environment or human variability. Also, the definition of organizational spontaneity does not exclude extrinsic motivators such as compensation or rewards as in definitions of organizational citizenship behaviors.

George and Brief (1992) described organizational spontaneity by identifying five distinct forms: “helping coworkers, protecting the organization, making constructive suggestions, developing one’s self, and spreading goodwill” (p. 310). Each behavior is performed voluntarily and supports the organization and its goals. Organizational spontaneity differs from more passive traditional organizational citizenship behaviors such as good attendance, good hygiene, punctuality, and compliance with company policies. Another difference is that organizational spontaneity is not separate from being recognized by formal reward systems. George and Brief also postulated that positive mood may be a result of motivational factors such as rewards and recognition and is an antecedent of both organizational spontaneity and innovation.

Knowledge Transfer

The third discretionary behavior described in the literature pertains to the flow of knowledge between individuals and the different levels of the organization. Senge (1998) defined knowledge as “the capacity for effective action” (p. 11). Information was distinguished from knowledge by explaining that information is knowledge about things and can be acquired and transferred from person to person while knowledge about how to do something is learned. “Sharing knowledge occurs when people are genuinely interested in helping one another develop new capacities for action; it is about creating learning processes” (Senge, 1998, p. 11). Nugroho’s (2018) research with validated survey responses from 288 administrative employees of a public university in Yogyakarta, Indonesia supported a positive relationship between collaborative cultures and knowledge sharing. In terms of discretionary effort, “knowledge

sharing takes place at the time an individual is willing to acquire or give knowledge from others to build new competencies” (Nugroho, 2018, p. 1141). The study hinged on the existence of a trusting and supporting (collaborative) culture to encourage sharing of knowledge, which in turn supports organizational learning. The advantages of knowledge transfer from organizational learning may lead to innovations leading to increased organizational performance.

Pérez López et al.’s (2004) research of 195 surveys from employees of companies in Spain with 200 or more employees found that collaborative cultures support knowledge management via organizational learning. Employees who maintain a collaborative culture including the characteristics of a sharing mindset and exhibit organizational commitment is essential to organizational performance. The researchers describe knowledge management as “a process that facilitates knowledge exchange and sharing...” (Pérez López et al., 2004, p. 94) and included organizational learning as a necessary precursor for knowledge management to occur. Also, interpretation was described as a construct within organizational learning that is specific to knowledge transfer and must take place before individuals share certain types of knowledge.

Through a series of literature reviews and interviews with executives in 24 companies, De Long and Fahey (2000) found how the executives initiated and managed knowledge related projects. Interviews with 12 chief executives about organizational culture over a range of manufacturing and service organizations were also conducted. Several case studies identified in the article were identified that studied companies who were competent in knowledge management. De Long and Fahey described knowledge as “a product of human reflection and experience” (p. 114) that is context dependent and results in an increased capacity for action. Three types of knowledge were categorized: “what people know or know what to do,” “knowledge that exists between individuals or within groups,” and knowledge that exists in

organizational “systems, processes, tools and routines” (De Long & Fahey, 2000, p. 114).

Knowledge management was also identified through new projects, new processes, or activities.

Knowledge transfer was also linked to several motivators in the literature. For example, trust impacts the flow of knowledge between the organization and the employees and between employees. “Another way that culture shapes the context for horizontal interactions is through norms and practices that promote collaboration” (De Long & Fahey, 2000, p. 121). Cultures that explicitly favor knowledge sharing over knowledge acquisition will create a context for interaction that is more favorable to leveraging knowledge. Teaching is another behavior that influences the social context, even as it enhances a firm's existing knowledge base. De Long and Fahey also linked supportive leadership to knowledge transfer by recommending several managerial actions that are considered supportive in nature.

Arguments of Discovery and Advocacy

As discussed in the beginning of this chapter, the series of claims supported by the literature chose for this literature review culminates into a complex claim that supported an argument of discovery. The series of claims that were supported by the literature included the history of the term discretionary effort, how the term has been defined, and how the term has been used in recent literature. The complex claims from this literature review are twofold. First, motivation is central to the individual’s choice to act and the commitment to accomplish the act. Second, discretionary effort is expended with positive intentions for the organization. Hence, the overall argument of discovery is that discretionary effort is a potential organizational resource that could be used to make the organization successful but depends on employees that are motivated to choose to perform actions not prescribed by the organization and under the employees’ control. The complex claims of the discovery phase are also the premises for the

argument of advocacy. The argument of advocacy of this literature review explains that to leverage the beneficial actions of employees' use of discretionary effort, the organization must take actions to encourage motivation and discourage deterrents of employees to foster discretionary effort.

Chapter Summary

Before workers populated factories in droves in the Industrial Age, many people were responsible for providing for themselves on a farm or performing their craft as part of a community. When these workers came to work in a factory, they were supervised and instructed what to do and when, thereby taking away their choice in conducting matters in their work. As work was rendered simpler with technology and worker rights and benefits were realized, employees became less supervised at work. With more autonomy, employees gained the ability to choose how much effort employees would expend at work (Yankelovich & Immerwahr, 1984).

As Young (1936) stated, all behavior is motivated. Behaviors that utilize discretionary effort are derived from several motivational factors and is included in several motivated state constructs such as employee engagement models. Examples of employee engagement such as the ability to be more involved in decisions and work that is interesting to workers can result in workers giving more at work. Setting reasonable goals for employees can also cause employees to use more discretionary effort in positive and sustainable ways. Offering rewards as incentives as a motivational tool to reach goals is a common method of encouraging employees' efforts. However, compensation as a reward has not resulted in a linear relationship with discretionary effort. This may be due to compensation being considered an extrinsic concept outside of the

employee's control (Deci & Ryan, 1985) while discretionary effort is considered an intrinsic concept similar to work ethic or values.

The extra effort that employees may choose to withhold is important to the organization. In especially difficult business times, the organization depends on its employees' ability to perform more to make it through. Fostering of discretionary effort prior to implementing change is a key strategic goal for the organization. Some leadership styles may employ threats and intimidation to ensure effort is high. However, to maintain high efficiencies and keep employees' morale high, leadership's focus on employees' perception of being treated will remain to be the subject of several studies. This chapter identified the motivation factors, states, and behaviors associated with discretionary effort, but the literature fails to determine why individuals are motivated to choose to expend extra effort in the workplace. In Chapter 3, the methods used in the study are described along with an explanation of why these methods were chosen.

CHAPTER III

RESEARCH METHODOLOGY

The purpose of this grounded theory study was to describe what motivates hourly manufacturing employees to initiate discretionary effort in the workplace. In chapter 2, a review of literature was presented covering what has been written about discretionary effort, including the three main components of discretionary effort, namely motivation, effort, and choice. This chapter provides the research methods for this study beginning with the design, rationale, and approaches that were used. Theories influencing the study are also presented. Additionally, site and participant selection, data collection and analysis methods, and trustworthiness are discussed in subsequent sections.

This study sought to understand what motivates hourly manufacturing employees to initiate discretionary efforts in the workplace by addressing the following overarching research question: What theory describes how and why hourly manufacturing employees expend discretionary effort? To answer the overarching question, the following questions examined discretionary effort to create a theory of discretionary effort using constructivist grounded theory methods.

Q1. What personal characteristics influence an employee to choose to expend discretionary effort?

Q2. Under what conditions do employees expend discretionary effort?

Q3. What beneficial outcomes are perceived by employees from expending discretionary effort?

Findings from the information gathered will add to the body of literature concerning how and why manufacturing employees are motivated to perform in the workplace beyond minimum prescribed role expectations.

Research Design

Qualitative research was chosen to conduct this study as opposed to quantitative research for a variety of reasons. All the elements and mechanisms have yet to be identified for a detailed understanding of such a complex concept as discretionary effort. Alternatively, quantitative research studies identified variables. Qualitative research centralizes on the researcher by utilizing the researcher's ability to use complex reasoning through inductive and deductive logic, interpretation, using the researcher as the key instrument, and accounts for the author's reflexivity. Furthermore, qualitative research is more flexible than quantitative research and enables participants' multiple perspectives and meanings, considers that the situation may be context dependent, and innately has the flexibility of an emergent design (Guba & Lincoln, 1989; Creswell & Poth, 2018).

Grounded Theory Methodology

The overarching research question for this study involves the development of a theory to identify and explain situated and interrelated mechanisms of discretionary effort. Many qualitative research methods explore "the what" and "the how" of identified actions (Katz, 2002). Instead, grounded theory methods concern the development of theory based on the contextually situated actions taken during the events described by participants and determining why (Charmaz, 2014; Katz, 2002).

Design Rationale

This researcher chose a grounded theory approach for this study to obtain in-depth and detailed descriptions of instances situated in contextual conditions involving participants expending discretionary effort to develop a theory to explain the phenomenon and why it occurs. The first grounded theory research methods were developed by Glaser and Strauss in the late 1960's to provide validity to theories advanced from empirical quantitative research, and as such tended towards the positivistic paradigm that focuses on one absolute truth from scientific research (Creswell & Creswell, 2018; Lincoln et al., 2011). However, as grounded theory methods developed over time, distinct differences between conceptions of theory and theory development became apparent. Two types of grounded theory methodologies emerged, namely, objectivistic and constructivistic (Charmaz, 2014; Glaser, 2007; Mills et al., 2006). While objectivistic methods embraced positivistic paradigms, constructivistic methods embraced interpretive paradigms. Objectivists construed findings from research as truths in real life, however interpretivists considered reality as constructed from the interaction between researcher and participants through the research process. Traditional distinctions between positivism and constructivism paradigms by ontology, epistemology, and methodology are described in Table 4.

Table 3

Differences in Positivist and Constructivist Research Paradigms

Item	Positivism	Constructivism
Ontology	Naïve realism – “real” reality but apprehendable	Relativism – local and specific constructed realities
Epistemology	Dualist/objectivist; findings true	Transactional/subjectivistic/created findings
Methodology	Experimental/manipulative; verification of hypotheses; chiefly quantitative methods	Hermeneutical/dialectical

Note: Adapted from “Paradigmatic controversies, contradictions, and emerging confluences revisited,” by Y. S. Lincoln, S. A. Lynham, & E. G. Guba, 2011, In N. K. Denzin & Y. S. Lincoln, *The SAGE handbook of qualitative research* (4th ed., pp. 97-128). SAGE Publications, Inc.

The researcher brings particular perceptions and orientations towards the world that impact the nature of research (Creswell & Creswell, 2018). When this researcher started the doctoral journey, this researcher was predisposed to prefer acquiring and analyzing data to receive results. However, as this researcher was exposed to different research approaches, the value of speaking with people and considering the respective points of view changed this researcher’s perspective of creating knowledge. The next three sections detail how the evolution of this researcher’s perspective viewed from ontology, epistemology, and methodology standpoints affected this research.

As this researcher was exposed to various methodological paradigms, the dissertation research followed the practices of social constructivists. Social constructivists hold that individuals subjectively strive to understand the world based on the perceptions and experiences throughout a lifespan. A researcher investigates to discover the complexity among participants’ views rather than attempting to narrow concepts into a few ideas or categories early in the research process. The focus of such research depends on how experiences are viewed from the participants’ point of view. Individual meanings of experiences are constructed through social interactions with others including historical and cultural norms learned socially. The context in which the participants experience the phenomenon under study is also of great import for a greater understanding how the participants came to develop particular viewpoints. By making sense of participants’ patterns of meanings, a theory may be inductively generated

(Creswell & Creswell, 2018). Researchers seek to understand the context or setting of the participants by visiting the setting to gain a better understanding of the context that the experiences are situated in. The acquired meanings are social in nature from interactions with others in the context. Also, researcher findings are based on interpretations influenced from the researcher's own experiences, resulting in the researcher and participants co-constructing the theory together.

Ontological

This researcher exhibited a constructivist ontology that considers many multiple realities unbound by the restrictions of natural laws. This researcher held that each person viewed the world from a unique, personal perspective and subsequently constructed an individual reality. The perspective is developed from experiencing the world and making sense of what is experienced. Experiences and meaning may be compared to prior experiences and making sense of the world may be developed through interaction with others. The viewpoint allows for many realities instead of one true reality as in a realist ontology. Truths may be identified through an awareness of multiple perspectives becoming aligned. For this study, this researcher investigated to identify alignments through the multiple realities of the participants and compared them with this researcher's reality (Guba & Lincoln, 1989).

Epistemological

Positivistic viewpoints tend to count on the impartiality of a researcher to explain results with no bias or influence. However, in this dissertation research, this researcher found it very difficult to believe that researchers can completely divorce their value and belief systems from the research. For example, in the selection of a research problem, the researcher relies on the collective experiences and corresponding constructs of meaning. Hence, this researcher's point

of view for this dissertation research stemmed from the assumption that the researcher's positionality subjectively had an impact on the research and needed to be accounted for.

Likewise, the values of the participants and subsequent comparisons to this researcher's values was a necessary consideration.

Methodological

Positivistic methodologies entail removing context and other distractions with particular controls to expose the truths sought after. However, this research took into account the context that the participants worked in. The individual constructions of reality were compared to other constructions with the intent to co-construct a theory to develop an understanding of the manifestation of discretionary effort. The interpretation of several participants viewpoints and constructed realities resulted in a better overall construction of reality, establishing the method as a hermeneutic methodology.

Approaches

According to objectivistic methodology, objectivists maintain space between the researcher and participant and inevitably "assume a value position" (Charmaz, 2014, p. 237). The position of the researcher was assumed to be an entirely objective position, independent from context, in which conceptualization occurs without researcher interpretation by ruling out subjectivity through the number of cases studied. On the other hand, constructivists believed that individuals retained subjective meanings of their experiences and sought to understand the environment in which they lived (Creswell & Creswell, 2018). Constructivists developed grounded theory together with the participants and accepted the positionality of the researcher, minimizing potential value positions and corresponding influence on the findings of the study. Data and analysis resulted from shared experiences between researcher and participant while

keeping the phenomenon as the priority. The constructed theory is therefore considered a co-created interpretation. Charmaz (2014) related interpretive theories to agency of the participants and researcher:

“Interpretive theories aim to understand meanings and actions and how people construct them. Thus, these theories bring the subjectivity of the actor and may recognize the subjectivity of the researcher. Interpretive theory calls for the imaginative understanding of the studied phenomenon” (p. 231).

This researcher followed Charmaz’s (2014) approach to use constructive grounded theory methodologies to collect and analyze data. Constructive grounded theory methods differ from prior grounded theory methods by focusing on the participants’ actions derived from participant responses, then coding and writing memos around emergent ideas from a pragmatic viewpoint resulting in developed categories constructed into a working theory about the phenomenon under study. Additionally, Charmaz set the method apart from objectivistic grounded theory methods by going deeper in the data stating that “earlier grounded theory approaches had emphasized overt actions and statements rather than covert actions and implicit meanings” (Charmaz, 2015, p. 404). In other words, constructive grounded theory peels back another layer and investigates why an action is taken instead of only analyzing the action itself. Correspondingly, questions were asked of participants to express their ideas about discretionary effort, including how participants react cognitively and at times, emotionally. Participant responses were coded recursively using the constant comparative method as informed by Charmaz (2014). The method involves comparing and contrasting codes with other codes, memos, and increasingly larger amounts of data from participant responses.

Supporting Theories

Although the intent of grounded theory studies is to collect data and construct new theories (Charmaz, 2014), qualitative researchers may base the pursuit of a research topic on a basic knowledge of the phenomenon under study. Extant theory situates qualitative research clearly within the scholarly conversation, adds dimension and depth to what may appear at first glance to be simple phenomena, and allows for building understanding and awareness of diverse perspectives of the phenomenon. Interestingly enough, the use of extant theory positions social science research closer to research in the natural sciences (Mertz & Anfara, 2015). A theoretical perspective informs the understanding of complex social realities and directs attention to the timing of collecting and conceptualizing data. A good theoretical perspective helps qualitative researchers orient themselves to the worlds they study, but extant theory does not predetermine what is found (Locke, 2001). Theories that influenced this research are discussed in the following section.

Leibenstein and X-Efficiency Theory

Behavioral economists consider individual judgement and choice by focusing on the estimation of probabilities and analyzing processes people use to choose an action among alternatives in economical matters (Camerer & Loewenstein, 2004). Liebenstein (1978), a behavioral economist and Harvard professor, noticed graduate students that expended a great deal of effort one day oftentimes walked around campus drained the next. Likewise, Leibenstein noted that organizations rarely exhibited the mechanical ideals of traditional economic theories (Frantz, 2020). As a result, Leibenstein theorized how a company may outperform a different yet identical company holding everything constant from an economics perspective. Efficiencies not previously delineated by traditional economic theories that precluded organizations from

achieving ideal operational outputs were acknowledged and explored. The unidentified efficiencies were shown to be more significant than inefficiencies identified by prior theories such as microeconomic theory (Leibenstein, 1966).

During Leibenstein's research, employees were found to retain a certain amount of freedom toward how much effort was expended. Labor contracts, organization's production and cost functions were viewed to be incomplete and no fixed relationship between inputs to outputs or outputs to costs were identified. Employee rationality in the workplace seemed to be random, sometimes on point and other times straying from organizational goals for no apparent reason. The term X-efficiency was developed and described as an intervening variable that closes the gap between an organization's inputs and outputs (Frantz, 2020). In X-efficiency theory, effort and motivation support work contextual factors for workers including supervisors and managers.

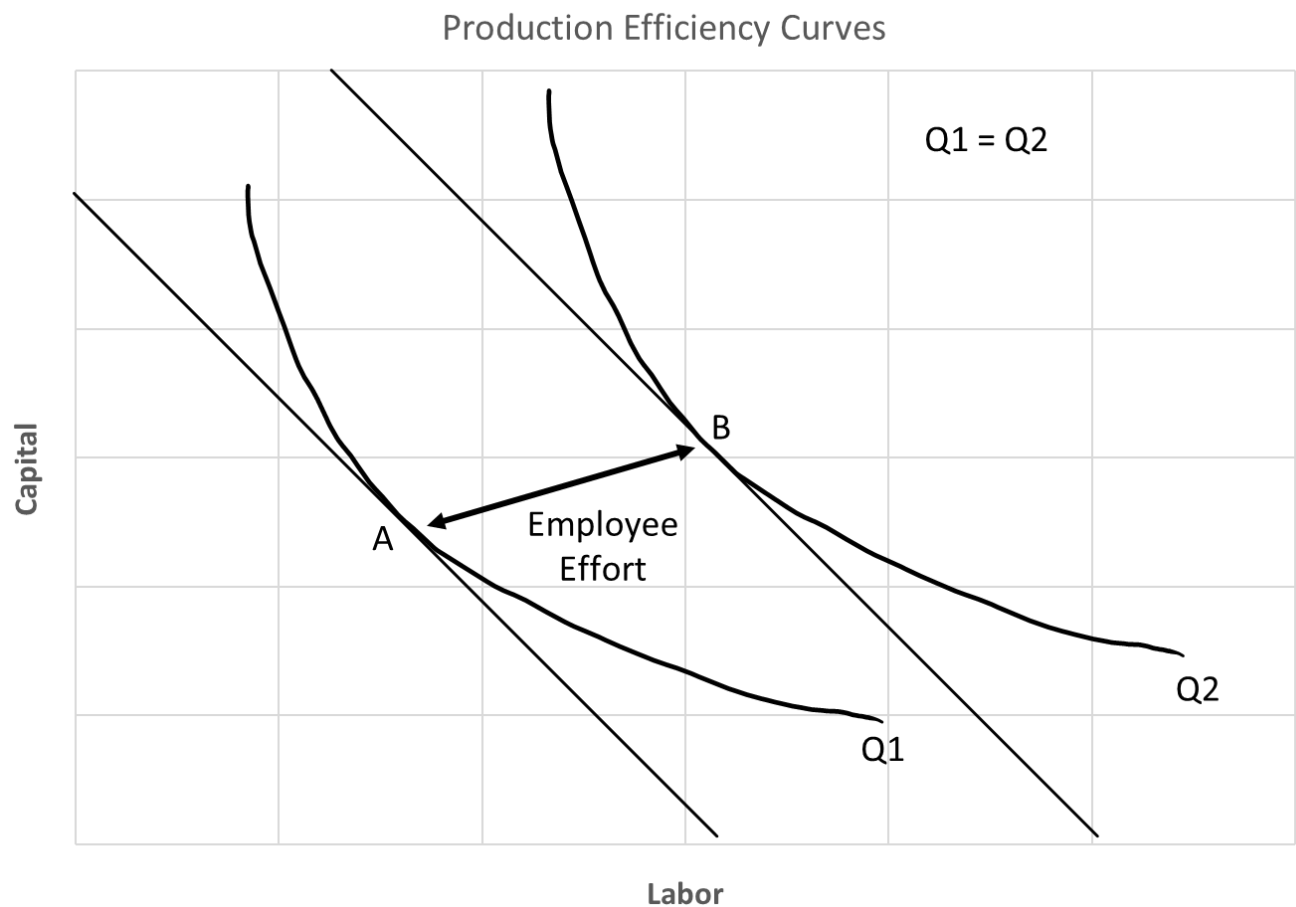
As Leibenstein (1966), pointed out "the nature of the management, the environment in which it operates, and the incentives employed are significant" (p. 401). Leibenstein (1978) also speculated that individual performance is based on individual choices that are made, influenced by motivating factors in the workplace and independent of the resources available to the organization. The existence of the motivations of the work context were described to be influenced by internal motivational structures and the organization's external environment.

Identifying a descriptive model of the X-Efficiency model in the literature was difficult because Leibenstein had little interest in developing a model that described the factors involved with maximizing efficiencies (Frantz, 2020). However, the first graphical descriptions of X-Efficiency involved terms familiar with economists. Economists typically used X-Y charts to display differences in organizational efficiencies. The term isoquant was used to graphically represent all combinations between capital expenditures and labor costs to yield the same output

(Q). Isocosts are lines used to describe the same total cost with various combinations of capital and labor costs. The point where an isocost and isoquant meet and have the same slope is said to be the most efficient combination for the output. In Figure 3, two isoquants of equal outputs of similar organizations are presented by similarly shaped curved lines. The costs represented by the two straight isocost lines show a disconnect between two organizations. Points A and B show the most efficient usage of capital and labor to achieve each organization's output. The difference between the efficient sweet spots of each organization's output curves is attributable to the level of effort of the employees of each organization (Altman, 2007).

Figure 3

X-Efficiency described with isoquants and isocost curves

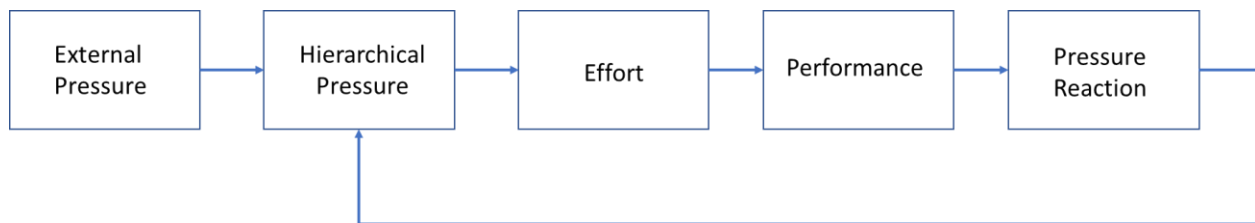


Note: Adapted from “Effort discretion, economic agency and behavioral economics: Transforming economic theory and public policy,” by M. Altman, 2007, In R. Frantz (Ed.), *Renaissance in Behavioral Economics* (pp. 105-145). Routledge.

Later in Leibenstein’s career, perceived pressure was believed to be the key to increased levels of employee effort. Pressure from the environment external to the organization influenced internal pressure on the organization’s hierarchy or management. Management likewise sought to increase effort internally with factors that impacted all the individuals in the organization, including decision making and other changes in output from employees in the form of requisite effort and discretionary effort. The cumulative increase in effort was anticipated to increase performance that in turn, was observed by management leading to a reaction to determine if the internal pressures needed to be amplified or relaxed. The process continued until an equilibrium was reached depending on the needs from the external environment. However, the concept was maintained that with the appropriate level of motivationally derived voluntary effort, more could be achieved than increasing prescribed managerial measures to increase requisite effort. A corresponding model is displayed as Figure 4.

Figure 4

Model of firm production



Note: Adapted from “Inside the firm: The inefficiencies of hierarchy,” by H. Leibenstein, 1987, Harvard University Press.

X-Efficiency theory was chosen to enlighten this study due to being the foundation of the development of the term discretionary effort and provided a direct correlation of practicality of the term from an economics perspective. The theory was also heavily based on the importance of individual motivation in varying interrelated parts of the organization. The motivation of individuals as the unit of measure for this study also aligned with the literature that correlates effort to behavior.

Pierre Bourdieu and Theory of Practice

Pierre Bourdieu, a French sociologist, anthropologist, and philosopher developed the Theory of Practice after observing economic and social struggles of the Kabyle people, also known as the Berbers, during the French-Algerian War that took place from 1958–1962 (Johnson, 2002). The Theory of Practice describes how practices are derived from the activity of three main concepts: habitus, field, and capital. Each of these concepts are discussed in the following section.

Habitus was described as the collective dispositions of an individual that affect how experiences are perceived and how decisions are made (Bourdieu, 1977). Habitus is an embodied and durable structure that follows a distinct transposable logic yet is also a structuring structure which has the ability to transform or reinforce the operations within the field in terms of its regularities, limits, and acknowledged forms of capital (Kloot, 2009). The concept of habitus has been described and identified by other terms. For example, Senge (1992) discussed the term mental models as formed from “images, assumptions, and stories” (p. 5) that shape how we act and affect what we see, resulting in conceptions from simple generalizations to complex theories. Similarly, schema referred to an organizing framework that guide ways of understanding events (Bartunek & Moch, 1987; Markus & Zajonc, 1985). Likewise, Van de ven (2007) described

mental frameworks consisting of “personal beliefs, attitudes, prejudices, and expectations” (p. 75) used by individuals to interpret and rationalize situations that are experienced. Correspondingly, an understanding of individual dispositions enabled an understanding of which conditions may allow for increased individual performance (Ach, 1910/2006).

Fields are described as spaces that contain a variety of positions that are attained by certain types of influences that may be imposed on individuals in the field (Doblyte, 2019). Fields may be seen as contexts in which an individual’s disposition or dispositions are developed and function. From a Theory of Practice perspective, Bourdieu and Wacquant (1992) explained the relationship between dispositions, fields, and capital:

A field consists of a set of objective, historical relations between positions anchored in certain forms of power (or capital), while habitus consists of a set of historical relations ‘deposited’ within individual bodies in the form of mental and corporeal schemata of perception, appreciation, and action. (p. 16)

Similar to habitus, fields were also represented in other areas of the literature. For example, Mary Parker Follett (1925/1995) described a field of desires in which employees found themselves when attempting to make decisions and potentially minimizing conflicts between individuals at work.

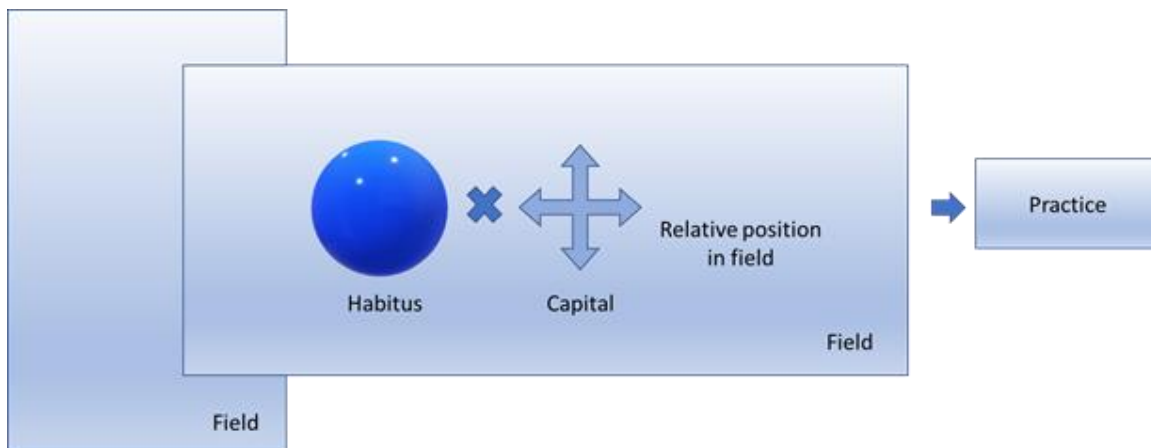
Capital was central to how human practices form and from Bourdieu’s perspective, was the currency of the field. Capital may also be recognized as the fuel that drove the mechanisms within the field and defined what is accepted or excluded by defining the value of the field’s products and processes. The coexistence and interrelations between field and habitus was possible by the role that capital plays by providing the methods of communication between them (Grenfell, 2009). Within the field, individuals struggled to acquire and possess forms of capital

as positions of status and power that influenced others in the field and the field itself (Kloot, 2009).

Bourdieu explained that the existence of different types of capital depended on the awareness of the value of the capital by individuals in the field, existing only while individuals believed that the capital exists (Grenfell, 2009). The effort individuals expended to obtain a type of capital increased the perception of the value of the capital in the field. In the workplace, employees were constantly aware of “signals about whether their engagements matter, how safe they are, whether their leaders truly welcome and know what to do with them” (Kahn, 2010, p. 29). Hope may exist in the pursuit of capital and the accompanying possibilities that may result in the near future. The interactions of habitus, fields, and capital is displayed in Figure 4.

Figure 5

Interaction between habitus, field, and capital



Note: Adapted from “Outline of a theory of practice” (R. Nice, Trans.), P. Bourdieu, 1977, Cambridge University Press. (Original work published 1972).

This study applied Bourdieu’s Theory of Practice as an analytic lens. Bourdieu’s research methods were fundamentally qualitative in nature and were developed from interviews and observations in the field. Bourdieu’s concepts of habitus development from being exposed to

experiences and influences over time and contexts is similar to constructivism ontologically (Mills et al., 2006). Similar to grounded theory methods, “Bourdieu collected data first and then developed theoretical statements to explain the relationships he found in them” (Grenfell, 2009, p. 19). Likewise, the researcher collected data through interviews, then employed constructive grounded theory methods to code the data, identified theoretical categories, then developed theoretical statements from findings that answered the research questions. The theory focuses on the individual, the unit of analysis for the study. Specifically, the theory explains how individuals are shaped from experiences temporally, how individuals are situated in their environments, and how actions are chosen by individuals depending on influences and situations in context.

Study Participants

Setting

The first requirement in constructivistic research is conducting the study in a natural setting ensuring the study is conducted in the context in which the phenomenon occurs (Guba & Lincoln, 1989). The research sites were two furniture manufacturing facilities located in two separate small cities in the southwest region of Michigan. The number of employees of each facility approximated 400 employees. The research was conducted during the COVID-19 pandemic and appropriate controls such as social distancing using virtual meeting methods were employed.

Participants

The population considered for this study involved industrial manufacturing workers. Manufacturing workers are in an occupation where any improvement in performance can be related to financial gain and recently have been considered as essential workers in times of crisis (Cybersecurity & Infrastructure Security Agency, 2020). How hourly manufacturing employees

experience discretionary effort may become a priority for managers to recover from significant change in the near future and as the world settles into a new normal. To acquire data to investigate how hourly manufacturing employees experience discretionary effort, participants in this study were non-salaried, manufacturing employees who were 18 years old or older with 3 or more years working on the front line. Non-salaried employees were selected as participants since salaried employees may have different motivational factors than non-salaried employees (Najjar & Fares, 2017; Neumann et al., 1999). Nineteen of the participants were male, and six participants were female. The ages of the participants were not directly requested but were voluntarily offered and ranged from 24 to approximately 60 years. Names and titles of employees and any company names were withheld to minimize the possibility of identifying the employees to preserve participant anonymity.

Participant Recruitment

Access to the site was possible through networking with a management employee, or gatekeeper (Jupp, 2006; Lavrakas, 2008) of the site. The recruitment of volunteers at the site was conducted via a recruitment flyer posted in areas utilized for employee communication such as bulletin boards and the employee breakroom (see Appendix A). To encourage honesty during the interviews, employees who participated were assured that knowledge gained by the process would not result in any action whatsoever (Shenton, 2004). Non-salaried employees who volunteered to participate in the study were backfilled by other employees so that negative impacts to the site's daily production goals were minimized. A room with a computer with internet access, microphone, and video capability was reserved for participants at the site to minimize interruptions and potential eavesdropping to preserve confidentiality. This researcher had not met any of the participants prior to conducting this research and this researcher was not

an employee of the company. Interviews were scheduled according to participant and investigator availability and were provided an informed consent form to sign.

The recommended number of participants varies by qualitative methodology and author; however, the consensus is to reach saturation, or enough participants that results in no new knowledge presented (Charmaz, 2014; Creswell & Poth, 2018; Merriam & Tisdell, 2016; Thomson, 2011). For this study, the number of volunteers was intended to be 30 as recommended by Thomson (2011), however the number of volunteers was 25, satisfying the recommendation by Creswell and Creswell (2018) of 20 to 30. 15 participants were interviewed from one facility and 10 from a second facility, both from the same company. Charmaz pointed out that an adequate sample size is difficult to predict in grounded theory and not as important as sampling adequacy. The intent was to reach theoretical saturation or theoretical sufficiency. “A study of 25 interviews may suffice for certain small projects but invites skepticism when the author’s claims are about, say, human nature or contradict established research” (Charmaz, 2014, p. 214). Discretionary effort, while an important concept to study, is not considered broad and may be considered a small project since it concerned a focused group of employees in a particular industry and location. Thus, a sample size of 25 participants was sufficient for this study. Also, after conducting interviews with 25 participants no new knowledge emerged and saturation of the theoretical categories was achieved.

Participant Selection

A purposive, non-probability, homogeneous sampling approach, also known as judgement or selective sampling, was used to select participants (Etikan et al., 2016). The approach allowed for the careful selection of participants from the levels of a manufacturing organization with similar job responsibilities and experiences who were more likely to be

exposed to factors that lead to expending discretionary effort (Lavrakas, 2008). Purposive sampling granted opportunities to select those participants who provided the most meaningful data to answer the research questions (Etikan, et al., 2016).

Data Collection Procedures

Data for this study was collected through one-on-one, semi-structured, open-ended interviews conducted via Webex, a virtual online platform. Participants were asked open ended questions and encouraged to ask questions about the research throughout the interview process. This researcher recorded the interviews using the voice recording capabilities of the Webex platform. Notes and memos were recorded in a notebook during and after each interview. Any notebook pages used for creating memos or other notes were kept in a binder at the researcher's personal home until the end of the research project.

Interviews

Although interviews may be used for validation of previously collected data in positivist methods, interviews in interpretivist methods may be the sole source for data, or complemented by observations and document review (Glesne, 2011). The interview protocol for this study consisted of an explanation of the interview steps, including the preservation of anonymity and confidentiality, and allowed time to answer questions from the participant before the interview questions were asked. Interview questions were developed based on readings and survey questions from the literature review to ensure relevance to discretionary effort and compared to the development of interview questions based on methods prescribed by Charmaz (2014). Initial questions centered on developing rapport including a description of role and responsibilities of the participant. Other questions were designed to ask for instances that involved experiencing discretionary effort. The questions were reviewed by two different professors versed in

qualitative research. A preliminary set of questions were used in an HSIRB approved pilot study with manufacturing employees of a different manufacturing company in 2019 and refined and reapproved by HSIRB for this study. Below are a few of the protocol questions:

1. Background questions: Would you please tell me about yourself and your current position? [Probes: How long have you been in this position?]
2. What would going above and beyond mean to you at work?
3. Tell me about a time when you felt like you went above and beyond at work.

Participants were allotted time at the end of the interview to ask any further questions before the interview was concluded. A total of up to 60 minutes were allotted for each interview, however, the interviews lasted from nine to 50 minutes, with an average interview time of 30 minutes. The length of time of interviews depended on the comfort level of the participants, impacted by several factors such as the virtual meeting method, content of the questions, how certain participants were to answer questions, and how open the participants were to explore personal experience and work context to answer the questions. Examples of certainty in leading to short interview times include participants that described having strong family values or quasi parental family values gained from the military or scouting. Paradoxically, the participant described as the most introverted and uncomfortable in social exchanges with someone not previously met had the longest interview time. The interview protocol may be found as Appendix B.

The interview recordings were transcribed by playing the recordings on one computer while using the Dictate function in Microsoft Word on a second computer, then appropriate details were added such as separating interviewee and researcher responses by recursively reviewing the recordings. The transcriptions underwent initial coding and the transcriptions and

initial codes were entered into MaxQDA, a qualitative research program, for analysis. An electronic folder system on this researcher's personal, password protected laptop computer was used to store types of data such as answers to interview questions, observations, and field notes. If the data was requested to be shared for review during the study process, the binder of paper copies, or the electronic files on the laptop were available to a limited number of people including principal investigators, instructors, and the dissertational chair. After the data analysis and final report was written, all notes and recordings are stored at the university for a minimum of 3 years, then destroyed ensuring participant confidentiality.

Document Review

Documents reviewed for research are a “potentially fruitful source of both primary and secondary data” (Whitt, 2001, p. 453) in written or other recorded form that are not created for study. Documents are “grounded in the setting and the language in which they occur” and “may be the only way to study some aspects of a setting or phenomenon” (Whitt, 2001, p. 452). The review of documents aids in the triangulation of data sources enhancing the credibility of findings in research studies (Bowen, 2009).

Applicable documents for this study were few and had little overall impact on the findings. Several participants discussed the annual review process for hourly workers and the company provided a blank copy for review upon request. The performance review document was believed to shed some light on what was going on with participants since the company's view of how effective the employee is at work, increases in compensation, promotion opportunities, and bidding to other jobs in the company depended on the employee's score. The second document was the results of the latest engagement survey. Scores from the survey of all the employees may

have provided insights about the pulse of the company at the locations where the participants worked and likelihood to expend discretionary effort.

Data Analysis

Data collected from the study was analyzed using grounded theory techniques and methods in MaxQDA. In a constructive grounded theory approach, Charmaz (2014) endorsed a constant comparison of codes and memos of data received from open ended, semi-structured interviews, which are transcribed for analysis. This section describes the steps used to analyze the data collected in four steps: data coding, theoretical sampling, memo writing, and diagramming.

Data Coding

The first step in data analysis is to link actions from the context of the data by developing codes. Grounded theory coding is more effective than simply organizing and synthesizing data, such as in thematic analysis methods. Grounded theory coding initiates the data analysis process early in the research process because the researcher discerns potential theoretical meanings of the data and codes at the coding stage. “Through comparing data with data, we develop the code. Then we compare data with these codes, which helps refine them” (Charmaz, 2014, p. 144).

Codes in grounded theory research represent the individual building blocks used to develop the structure of the theory. For example, Charmaz (2014) used the metaphor of bones and a skeleton to represent how codes and the theory relate to each other. One difference in constructive grounded theory is how the first step of data coding is accomplished. Initial codes involve interacting with data sets, either individual words, lines of data, or incidents. With either method, the researcher identifies what actions were taken as described by the participant. Each initial code is written beginning with an applicable gerund and followed by words that

effectively describes the action in each line. The use of gerunds to begin the codes assisted in prohibiting using themes in the data to create codes, allowing for further abduction and inductive thought processing prior to identifying patterns. In this study, initial codes were developed using the line-by-line approach. The resulting codes were listed until each transcribed line in the interview was coded. Lists of initial codes of the interview data of each participant were added to MaxQDA. The initial codes were compared with other initial codes and data from other interview transcriptions recursively. Below are examples of participant responses followed by initial codes in bold:

I think it's a lot of it's just my work ethic. Um, I wanted... Well like I said before I was in a marketing position this is kind of like a foot in the door to hopefully do something else down the road so I would want to be looked at as doing a good job my jobs are important to me, any job's been important to me and I just kind of always thought that way [Participant 12].

Attributing doing more to work ethic.

Working in current role to start with the company for possibly higher responsibility roles in the future.

Striving to have a good reputation to be considered for higher roles.

Thinking that any job is important has always been there.

Um, well I would say everybody that, first off our department was successful and and it all trickles down eventually the company would be as it helps company and I would say you know if it's good for the company in the long run hopefully it's good for me as well, all of us you know [Participant 15]?

Identifying those who benefitted from suggestions included employees up through the company.

Helping the company benefits its employees.

I feel like I make a difference. I feel like I make a difference. I feel like my efforts paid off. Um, I, and later on I'll, I'll look back on it just like I am right now and I'm thinking you know, our leadership doesn't even know what we do. [laughs]. They don't even realize the extra things we do to make stuff happen around here [Participant 21].

Feeling like efforts made a difference.

Noticing that leadership is unaware of what is required to make everyday tasks happen.

The initial codes were further analyzed and coded using MaxQDA to determine patterns that were identified as focused codes. The focused codes were compared to other focused codes and larger segments of data. The focused codes were then analyzed and grouped by similarity to form categories. Focused codes and frequency in the data were listed in Table 4.

Table 4

List of Focused Codes

Code System	Frequency
Sports	10
Military experience	12
Provide for family	2
Relating behaviors to interacting with people at work	55
Material management is constant concern	20
Positive feelings from doing more	42
Willing to do more	18
Identifying good employees	16
Using skills to benefit company	35
Helping others	44
Identifying differences in employees	29
Efforts targeted to make work easier	38
Positive aspects of working at company	16
Contributing time as support	13
Working to best of ability	12
Just the way I am	25
Relating behaviors at work to learned behaviors from upbringing	65
Identifying as being valuable to the company	33
Being needed by company	14
Identifying status outside of organizational hierarchy	50
Identifying undesirable employees	42
Flexibility is valuable to company	23
Identifies self within organizational hierarchy	44

Theoretical Sampling

After at least one category has been identified, a process called theoretical sampling may be employed to acquire additional data to saturate categories and how categories interact (Charmaz, 2014).

“When you engage in theoretical sampling you seek statements events or cases that illuminate your categories. you might add new participants or observe in new settings. you may ask earlier participants for the questions or inquire about experiences that you had not covered before” (Charmaz, 2014, p. 200).

Theoretical sampling may involve searching through applicable documents, noting observations, reinterviewing participants, or interviewing new participants to discover data related to theoretical categories. When conducting interview studies, focused questions may be asked to explicate categories. Second, the new data is coded and compared to each other and categories. Increasingly abstract and conceptual memos may be written to note new comparisons. The first 15 participant responses were coded and categories were identified. The 10 participants from the second facility provided the opportunity to obtain further data to fully develop the categories. Although the interview protocol was not altered per HSIRB requirements, when interview responses tended towards established categories, follow up questions were asked to further explicate the categories. Examples of questions used for theoretical sampling included questions such as “tell me more about that”, and “how do you think you became that way?” The examples below are excerpts from the transcriptions of the interviews with Participant 20 and Participant 24. The follow up questions are in bold.

R. That’s good, that's good too. Um. You think that your approach has changed over your career or, or do you maybe started that way, or do you think that developed over time?

20. I think it's always been instilled in me. I think it's always done there.

R. Where do you think it comes from?

24. Um, I've, I've volunteered to stay over 15 minutes you know, uh, to wrap up a skids, or to, to, you know, help clean up, or um...I'm always, me as myself, I'm always, I'm always willing to help out other people it's, if I see it's time to go, and their area's not cleaned, I always will go over and help them out. I do volunteer to help people a lot, 'cause I want everybody to get out on time and everybody should, the team, I'm always been a team player so yes I do volunteer to, I overextend myself sometimes, that's just me.

R. So, where do you think you get that from?

Memo Writing

Memo writing is a foundational step in data analysis in grounded theory methods. Memos were written in a journal to encourage inductive thoughts and abduction to capture possible theoretical relationships between categories. This researcher also used the free memo function in MaxQDA, which allowed for the linking of memos directly to data and codes. Constantly comparing data, codes, and memos provides an area for reflexivity and the writing process. Also, memoing early in the research process allows for identifying gaps in the data for later support and explication of categories accomplished by theoretical sampling (Charmaz, 2014). Theoretical sampling for this research was accomplished by interviewing employees from the second location. Memo writing is covered in more detail in Chapter 4 with the presentation of results with discovery from the analysis of data.

Diagramming

Diagramming entails creating a conceptual map that includes representations of theoretical categories and associated relationships, assisting the reader to visualize ideas and concepts from the research. A diagram may be used to place categories in order of influence, weight, and temporal direction. A conceptual map may display exchanges and interactions

between discovered concepts, thereby showing how the concepts function together. In this study, diagramming was employed to construct a theoretical framework constructed from the emergent categories and how they related to each other (Charmaz, 2014).

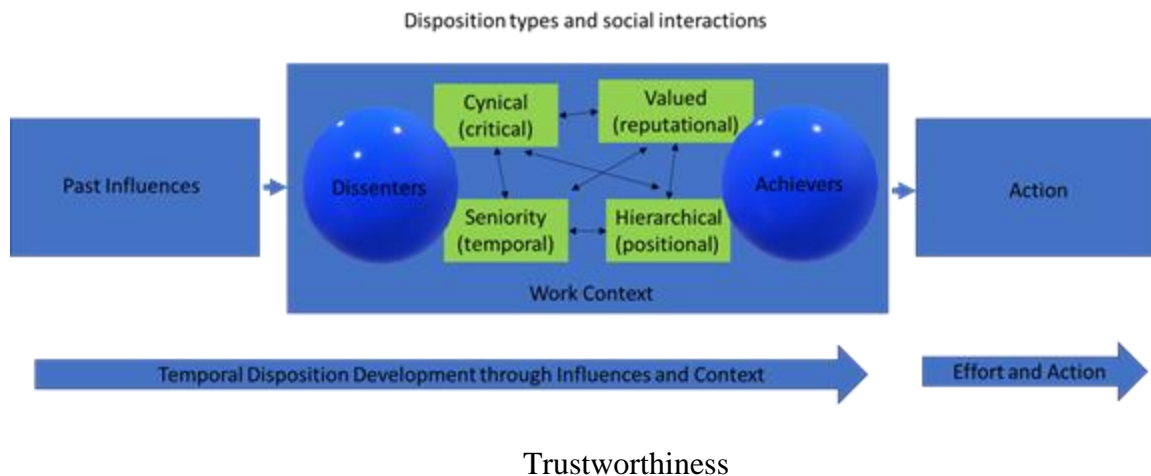
One of the initial diagrams included the representation of two of the main categories as two fields identified by employees as responsible for the development of the respective employee dispositions shown in Figure 6. An individual's disposition toward making choices prior to employment was influenced by interactions during upbringing and with peers. When individuals are employed by a manufacturing company, the manufacturing field (work context) affects employee dispositions as the employees begin to understand the workplace. The disposition types of the employees identified in this study are represented by spheres that reside on the work context. The long arrow at the bottom of the model represents the temporal facet of the development of the dispositions. Among the dispositions that reside on the manufacturing field, four types of status were considered. The individual dispositions may try to attain and maintain one or more of the status types labeled as: seniority, position, cynical, or valued/needed. The Achiever disposition is viewed as more likely to exert discretionary effort with the additional intent to maintain the position or valued status. However, some disposition types may not be interested in attaining or maintaining a higher status and also may not normally exert discretionary effort but choose to do only what is required of them. This disposition is categorized as Dissenters, so named because certain dispositions may not agree with exerting effort except for rare occasions. As Morgan (2006) explained:

Some people are committed to doing their job as an end in itself; others are more careerist. Yet others spend most of their energy attempting to make work life less onerous or as comfortable and consistent with their personal preferences as possible. (p. 159)

How individuals perceive the work context is based on the social influences experienced before and during the work context, the perceived social status attempted or acquired within the work context, and the situations currently in play within the work context itself.

Figure 6

Preliminary theoretical diagram



Trustworthiness

Trustworthiness refers to a set of criteria that determines rigor in constructivistic research and parallels the traditional criteria of rigor in positivistic research (Guba & Lincoln, 1989).

Trustworthiness centers around the researcher providing a detailed account of specifically how the data was analyzed. Furthermore, trustworthiness in a study is present when the study effectively covers what was done and why (Braun & Clark, 2006). Four areas of trustworthiness are credibility, transferability, dependability, and confirmability (Guba & Lincoln, 1989).

Credibility

Mapping the relationships between the constructed realities of the participants and the corresponding reality identified by the research is of utmost concern to ensure rigor (Guba & Lincoln, 1989). In this study, the environment and context of the participants who participated in the research will be described in ways that the participants and the researcher can relate to.

Descriptions of the processes that the participants described stresses the complexity of the situation and provided a base to provide a convincing accuracy of findings. This researcher had familiarity with the processes and setting under study, a strong interest in the subject matter, and prior interviewing skills with participants in similar contexts allowing for a sense of credibility to the reader. Strategies identified by Creswell and Poth (2018) used in this study to ensure credibility included: member checking by asking participants to check how their own comments have been interpreted, conveying findings through rich, thick description, and clarifying the bias that researchers bring to the work.

Transferability

Transferability refers to the usefulness of the analysis in another context and depends on the degree to which the described characteristics of the contexts overlap (Guba & Lincoln, 1989). Transferability may also provide guidance to conduct future research on the research topic (Braun & Clark, 2006) and apply the findings to particular situations. Items used in this study to provide transferability were a careful and detailed description of the setting, a thick description of the findings, a description of processes and outcomes that may be applicable to other settings, and discussion of how the findings could be explored further. Through thick description, knowledge derived from qualitative work can add to the body of knowledge on the topic being studied. A developed theoretical framework for this study organized the data analysis by providing a framework to guide the reader through the concepts and models. The upfront presentation of conceptual parameters of the research in the framework allows other researchers to determine if the findings of a study are transferable.

Dependability

Dependability refers to how the researcher maintains the stability of acquired data over time (Guba & Lincoln, 1989). Descriptive detail of changes in the research design and reasons why changes were made allows future researchers to improve the preparation of procedures, protocols, and research decisions. Acknowledgement of changes during research provides rationale to reanalyze data, to determine if the process of the study remained consistent and stable over time. Researchers may gauge dependability by conducting an audit of sorts.

Explaining strategies for handling researcher bias in collecting and analyzing data, detailing steps for addressing ethical concerns in qualitative research, and challenging interpretations also build dependability in the study. Items used to audit for dependability in this research included a verification of clear research questions, a rich description of the researcher position and role within the research site, consistent findings through a variety of data sources, providing a conceptual framework, and the process verified through peer review.

Confirmability

Confirmability refers to ensuring research is based on context and not simply on researcher opinion or imagination. Unlike positivistic methods that ensure rigor by exacting following of prescribed processes, in constructivistic studies, confirmability is rooted in the data and transparency in the methods used. Bias can be managed by relying on a neutral party to provide critical questions to the researcher such as a course professor, providing a review of bias from the literature, and viewing collection and analysis methods with an impartial yet critical eye documented in an audit or log trail. For this research, the data was reviewed by the participants through questions during the interviews and by other researchers. Confirmability was also attained by explaining how the study was framed, how the data were collected and analyzed,

achieving an awareness of the impact of the researcher's personal values and bias on the lens used during the study, and legitimate consideration of conflicting views. Views of outliers, conflicts from the literature review, and consideration of the motivation of participants who volunteered for the study assisted in sources of conflicting viewpoints (Guba & Lincoln, 1989).

Researcher Positionality

“The theory depends on the researchers view; it does not and cannot stand outside of it” (Charmaz, 2014, p. 239).

Constructivists come to terms that the context is not known well enough to have a prescribed set of questions and approach a study with the intent of learning instead of verifying. An instrument for discovery that is adaptable to the unknown context is best handled by a human being allowing for the application of the five senses to observe and social interaction. Hence, the human being is the instrument of choice for qualitative studies. A human being as the research instrument allows the use of tacit knowledge and investigating without prior knowledge of a research topic (Guba & Lincoln, 1989).

Creswell and Poth (2018) discussed the value of describing the past experiences of the researcher to provide an understanding of the person communicating the research to the reader. This researcher had worked in several types of manufacturing in the manufacturing industry including automotive, food and beverage, packaging, and energy control devices. This researcher had also worked in areas outside of the manufacturing industry such as military, retail, and research and development. The experience of working in a variety of industries has provided the opportunity to work with different types of employees performing at different capacities. The ability to observe manufacturing line workers and lower to higher levels of management while also serving in each of these capacities has proven to provide an interesting perspective in how

groups of employees interact with each other in different settings. In each of the groups and settings, the desire to work at a level above the expectations of the role has been of personal and professional interest. Many employees merely perform to an expected level perhaps to avoid notice, while others will openly participate in activities outside of role expectations, potentially capturing the notice of management.

As this researcher moved into managerial roles, the concept of creating an environment of employees working above a common expectation seemed beneficial and full of potential. This researcher drew off personal experience to determine some idea of how other employees would choose to exert effort beyond the minimum expectations of the particular role. This may have created a lens of bias since the researcher later observed that all employees may not have shared the same rationale or perhaps even timing to choose to perform beyond role expectations.

Additional complexity was observed when different leadership styles were considered. Many leaders in the industries that the researcher had worked with operated in a Taylorist mindset of minimizing or limiting the amount of choice the employee has in their work using such tools as constant reporting to target goals or increased scrutinization of immediate supervision. Some extreme examples included threats, intimidation, and the risk of disfavor of a charismatic leader (Deci & Ryan, 1987). Benefits of the experiences had resulted in development and preparation for employment with subsequent organizations during the researcher's career and opportunities for the application of theory into practice in the workplace during the coursework of the researcher's educational journey. For example, this researcher has held interviews for the purposes of hiring new employees that may have prepared for the nuances of conducting the interviews for this study. Disadvantages of these experiences may have created bias towards

certain leadership styles and may have altered the researcher's lens during data analysis (Creswell & Poth, 2018).

Human Participants and Ethics Precautions

Western Michigan University (WMU) and the research site both have institutional review boards (IRB's) that detail strict rules that direct research that involves human participants. This study complied with all the requirements of both IRB's, thereby eliminating the chance of harm to participants as a result of this research. Prior to each interview, every participant received an explanation of the research and voluntarily signed an informed consent form. The Webex virtual platform was required by WMU because it was the only virtual platform known to comply with HIPAA regulations.

Every precaution was taken to ensure the anonymity and confidentiality of participants. For example, any reference to a company, the employee, the employee's family, or other individuals' names were stricken from the interview transcripts and replaced with bracketing neutral words such as [company] or [supervisor]. Also, caution was taken to avoid phrases that a person may be identified by. All recordings were collected solely by this researcher and stored on this researcher's personal, password protected laptop computer secured in this researcher's personal home. Upon completion of the study, all research materials were disposed of per IRB protocols.

Chapter Summary

This grounded theory study used semi-structured, in-depth interviews in order to gather information about how hourly manufacturing employees experience discretionary effort. One-on-one interviews were the primary method of data collection and interview transcripts were compared to supporting documents for further analysis. Constructive grounded theory data

analysis methods were used to provide insight into how employees chose to expend effort outside of prescribed role and responsibilities in the workplace. The following chapter discusses findings derived from the analysis methods described in this chapter.

CHAPTER IV

RESEARCH RESULTS

Twenty-five manufacturing workers with front line assembly experience engaged in sharing of their experiences in the workplace. While many participants concurred that individual backgrounds differed from each other, the individual experiences from working in manufacturing shed light on the dimensions and innerworkings of the industry. Among the innerworkings of the workplace, shared experiences of expending discretionary effort emerged from answering questions from an open-ended, semi-structured interview protocol involving questions aimed at answering the following research question: What theory describes how and why hourly manufacturing employees expend discretionary effort?

The following chapter is a discussion of the results derived from the use of grounded theory methods in the analysis of responses of manufacturing workers. First, a summary of the research methods involved in collecting and analyzing the interview question responses is provided. Second, the coding process and identified categories that emerged from the analysis is presented. Third, a description of how the categories are interrelated and add to the overall understanding of the expenditure of discretionary effort and related outcomes is discussed. It is important to point out that providing detailed descriptions of the research participants was avoided to preserve the anonymity and confidentiality assured to the research participants before, during, and after the interviews. Writing memos throughout the data collection and analysis processes was critical to the creation of patterns that led to the development and explication of categories and also enabled abductive reasoning. Chapter 5 will build a theory of discretionary effort and discuss interpretations and recommendations for further study.

Data Collection and Coding Process

As described in Chapter 3, the undertaking for collecting data for this study began with the open-ended, semi-structured, virtual interviews of 25 research participants who have worked on the front line in a manufacturing setting. The interviews took place over a six-month period, which began in the fall of 2020 and ended in the spring of 2021. All participants worked for the same company. The initial 15 participants worked in one facility, and the other ten participants worked in a facility approximately 100 miles from the first one. The interviews were conducted from this researcher's personal home, while the participants answered questions remotely using Webex, a virtual meeting platform, from quiet offices at each location. As ideas came to this researcher during the interviews, personal thoughts were documented in notebooks. As ideas came to this researcher after the interviews, notes were jotted down in media available at the time including notebooks, Post-it notes, and the Notes app on a password protected personal smartphone.

Interviews were personally transcribed by playing each recording and using the Dictate function in Microsoft Word. After the interviews were transcribed, the resulting text contained several errors due to the limitations of the software. Each recorded interview was played back, each of the participants' responses were listened to carefully, and each transcription was corrected to be as accurate as possible. The extra time required to correct the transcriptions was lengthy but allowed for a higher intimacy with the nuances of the data and allowed for more inductive reasoning to inform the subsequent analysis process. Also, to preserve anonymity, any names mentioned by the participants were replaced with innocuous words such as "name" or "company." The corrected transcripts were uploaded into MaxQDA, a qualitative research software program, for the coding process.

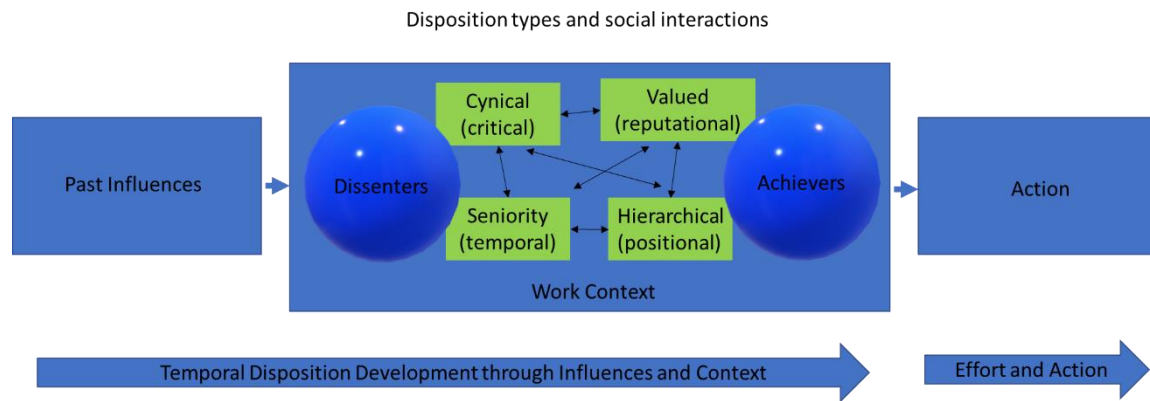
Chapter 3 detailed the coding process used in the data analysis in this study. The coding process resulted in 19 themes that accounted for various subcategories aligned with discretionary effort. The themes were subsequently organized into four main categories. Next, diagramming was employed to visually conceptualize how the four main categories related and interacted with each other. Figure 7 represents the categories and subcategories, and Figure 8 represents a preliminary theoretical diagram displaying initial thoughts about how the categories function with each other.

Figure 7

Data results presentation framework

External Influences	Work Context	Disposition	Action
Upbringing Peers <ul style="list-style-type: none"> • Sports • Military • Fraternal Organizations 	Hierarchy/ responsibility Hierarchy/ positional Being Valuable/ needed Positive reinforcement Positive aspects of work Coworkers <ul style="list-style-type: none"> • Seniority 	Employees are different Identifying Achievers Identifying Dissenters Just the way I am Working to best of ability Willing to do more	Material Handling Time as support Using skills Beneficial effort Helping others

Note. This figure represents the four main categories with the 19 subcategories identified from the coding process.

Figure 8*Preliminary theoretical diagram*

Note: The theoretical diagram displays a temporal development of habitus types prior to and within the work context along with identified types of capital that influence choosing actions.

Due to the limitations of virtual interviews, observations in the work context were not possible. However, body language and reactions between researcher and participant during the interviews were observed and noted as they occurred. Also, two documents were provided. The first was the last employee engagement survey results for the first location. The second document was a blank copy of the hourly employee performance review form used at the first location, but not the second location. The performance review process at the first location tied in to pay raises, consisted of two manager's feedback, and was taken into consideration for promotional opportunities. Understandably, the performance review process was mentioned by five of the first 15 participants in the interviews about discretionary effort. One participant explained the importance of receiving a high score on the annual performance review:

Uh, if it's I mean with a higher score you can bid out, um, with a certain amount of scores to, to certain jobs, um, but the higher score too it depends on if you get a one step or two step raise which is every six months. [Participant 11]

The following section discusses the results from the analysis of the data from the 25 participants interviewed by main category.

Results

The results from the analysis of participant responses included four main categories, namely External Influences, Work Context, Disposition, and Action. The following section begins with an introduction to each of the categories followed by a deeper dive into each category. The deeper dive into each categories explains the interactions between other categories that lead to the preliminary theoretical diagram represented by Figure 8.

External Influences

The first of the four categories is External Influences. For this category there are two subcategories derived from employee experiences outside of work. Upbringing refers to experiences from employees' childhoods predominantly with parents. Interactions with childhood peers at school, church, or other organizations were also identified. Interactions as adults with peers outside of the workplace such as military experience and involvement in sports also emerged. With one participant, interacting with one's peers proved to be an example of which not to follow. Individuals were not identified in any way in the quotations to ensure anonymity, and extra care was given to ensure that portions of the transcripts were omitted that could identify a participant.

Work Context

The second category is Work Context. Conceptually speaking, context may be viewed as "the set of connections that is relevant to a particular problem or person" (McLaren and Durepos, 2021, p. 75), and has been described as having the ability to "interact with personal variables such as disposition to affect organizational behavior" (Johns, 2006, p. 386). Johns (2006)

provided a taxonomy of context types, identifying factors both general and specific. The omnibus dimensions of context refer to broad conditions and may be conceptualized by the typical questions of who, what, where, when, and why. The discrete dimensions of context refer to specific conditions that influence behavior directly that may be categorized by task, social, and physical contexts. For this research, social context in the workplace is most relevant, from the social density impact on helping behaviors to social structure and influences including such factors that influence individual behavior such as an employee's seniority, communication style, and knowledge sharing. The work context for the purposes of this study referred to a manufacturing facility commonly known as a factory. Of particular interest was the area of the facility where the manufacturing process took place.

Most employees identified the role or title held when explaining what they did in the facility daily. Influences due to the particular role including additional responsibilities and additional skill sets ascribed to hierarchical roles were discussed during the interviews. For example, there were hourly workers who had management responsibilities for other hourly employee including job assignments and vacation scheduling. In several interviews, employees identified a characteristic that described how valuable the employee is perceived by management, and at times the employee rephrased the perception as being needed in the workplace. One employee made the connection relating parental influence outside of the workplace with peer pressure inside the workplace.

Disposition

The third category is Disposition. In Chapter 1, disposition was defined as an apparent or underlying resilient tendency or inclination to act in a certain manner in a particular situation. As described in Chapter 3, Bourdieu (1977) explained that an individual's collective dispositions, or

habitus, determines how a person observes the environment around them, determines the choices they make, and ultimately the actions they take. Many employees explained why an individual chooses to expend discretionary effort and how the decision takes place in very simple terms such as “it is just how things are” or “just the way I am.” One participant distinguished between different types of employees by explaining that an important goal in the workplace was to be perceived as a “good employee” and not a “bad employee.”

Action

The fourth category is Action. The term action was defined by Achziger & Gollwitzer (2018) as “all activities directed toward an intended goal” (p. 485). Specifically for this study, action refers to the practices of exhibiting discretionary behaviors from choosing to exert effort beyond role expectations. Many of the behaviors that resulted from expending discretionary effort were aimed at simplifying tasks to improve the flow of product through the manufacturing process. Many participants explained that taking extra steps proactively may limit or avoid the need to exert considerably more effort in the future. Additionally, the belief that actions taken were helping others in some way was identified by several participants. For example, some participants voluntarily performed extra tasks to prevent other workers from the perceived burden. Others exerted extra efforts to help others and the organization.

Category 1: External Influences

Conducive to the understanding of discretionary effort was considering how employees that consistently perform to a higher standard became that way. Many of the participants pointed to factors outside of the workplace for those influences.

Oh yeah, I remember as a kid going over to a buddy's house and, you know how you spend the night or camp in a tent or whatever, and we would go over to the neighbor's who is a farmer and work for him, you know, and then he was a good guy, he gave the

kids something to do and make them feel important and then of course we were just happy to help out and then when he paid us, boy... [Participant 2]

When asked about discretionary effort at work, the employees' experiences prior to beginning employment were discussed by most of the participants. Work ethic and dedication to the organization may be learned from experiences outside of work and may be seen as very beneficial to organizations. However, selecting employees solely by asking questions that determine if a potential new hire had positive influences prior to working at the organization in question during interviews may not be fool proof as individuals may have rebelled and not accepted the influences. It is important to consider that individuals may rebel against negative influences also, which may benefit the organization. One participant explained the ability to choose to exhibit beneficial workplace behaviors and be considered a good worker regardless of contrary influences.

I always thought I was doing the wrong things only because she [mother] kept telling me to get a girl job. When are you going to get a girl job? I've always been either farming, doing home repair, uh, making parts in a factory. Once I came here, I was driving forklift for all those years. So, she always used to ask me, you know. When you gonna get a girl job and dress nice, and you know, she's from, she's old school you know. [Participant 21]

Two categories of influences external to the workplace that were identified in the participant interviews were social interactions during Upbringing and with Peers.

Upbringing

The predominate influence to expend discretionary effort identified by most of the participants was from being raised by family, especially parental involvement.

I gotta give a lot of credit to my parents. It was just the way I was brought up, you know. If you're capable of doing the job do it. [Participant #1]

I mean he's [father] taught us like so many so many lessons growing up so I mean it's definitely it was beneficial to me and it's taught me how to like be the person and obviously help others. [Participant #7]

Some lessons described were harsher than others including instances of corporal punishment that understandably made lasting impressions. Certain cultures were linked to heavier family involvements such as cultures of Latin descent or growing up living and working on a farm that correlated to a strong family orientation, work ethic, and manual labor expectations from family members. Tangible results of expending discretionary effort were linked to living in these cultures and manifested in being self-driven due to peer pressure from family and friends. Quasi parental interactions with adult parental figures such as parents of friends, teachers, church leaders, or coaches of sports teams were also mentioned, although to a lesser degree.

Peers

Other social interactions experienced as a child and as an adolescent included interactions with peers at school, church youth groups, sports, and other fraternal organizations such as clubs and Boy or Girl scouts. Additional examples of influences external to the workplace include interactions with friends and peers as adults including involvement with sports, the military, and participating in fraternal organizations. One exception noted was one participant paradoxically resisted the influence of peers and chose to work with the organization as an example of improving the employee's life and wellbeing.

So, that motivated me to not be like that [adult peers]. To get somewhere, like pretty much embrace it, do what you can do, do pretty much your best and... [Participant #9]

Another participant's parental influence also rejected the influence of peers, and instead chose to focus on responsibilities as a parent.

Well, she [mother] worked, at one point she had two jobs, but she worked from eight to five every day and, you know, she goes home to make dinner. She didn't hang out with her friends, or have a bunch of guys hanging around and she was dedicated to her kids. I don't know, I gave her a lot of credit for that because you know she could have gone the other route and had other priorities, but her priorities were her children, so... [Participant #6]

Three areas of peer interactions were described as experiences in sports, fraternal organizations, and the military.

Sports

Involvement in sports also provided structure to several participants. Interacting with coaches and other players in a team setting made lasting impressions and influenced the expenditure of discretionary effort that translated to the workplace. Also, sports such as hunting and fishing were pointed out by two participants as enriching activities with parents and peers while growing up. One participant pointed out that experiences in sports has led to a mentality that allows for a calmer approach to high pressure situations.

Well, like, I don't know, I think I learned that mentality from sports. [laughs]. Yeah, 'cause like in high pressure situations I normally tend to perform way better than just the calm situation. [Participant 22]

One participant has taken the opportunity to be an influence on others by being involved with coaching children's sports and has received a great deal of personal satisfaction from the experience. The participant was able to take personal childhood experiences and relate to children going through similar experiences and become a mentor for the child.

You see, my parents got divorced and it affected me, alright, but as the years moved, were going on and I was coaching these young men and women I've coached some women and I notice that there's other things going outside outside of football and I know that they weren't concentrating on their drills or whatever and I knew that something was affecting them and then through word of mouth I you know I found out that you know [name] little [name] parents are getting divorced separation or somebody passed away and it dawned on me that these young men and women they were experiencing struggles in their life sure and it kind of backtracked to what I was going through they weren't just kids or football players to me anymore, now they've become something more than football players these young men went are going through a life change and they don't have control over it. [Participant 1]

The experiences from participating in sports influenced how decisions were made in the workplace. The structure from the rules and strategies in sports and mentoring from adults besides parents were the likely cause.

Fraternal Organizations

Fraternal organizations such as church youth groups, scouts, and freemasons have credos, mottos, or other guiding principles for their members. Two participants pointed out that involvement in fraternal organizations such as the Boy or Girl Scouts had a memorable impression and impact on how decisions were made as adults. The social interaction with peers supervised by adults guided and supported the employees as children and one participant has chosen to remain with the Boy Scouts to support children in troops as an adult.

Um, I would think so, yeah, in school whatever. I mean Boy Scouts, too, I was in boy scouts I am an Eagle scout, so that's pretty much what we're all about doing that kind of stuff helping everyone out being at one being a team and helping each other out.
[Participant 8]

I mean, pretty everyone in a scout troop, everyone is really close together we're all really good friends we all just did everything together especially if you went to like summer camp and that kind of stuff you can see the other troops and like they have different groups of kids in that group in their troop but with us we're always like together we're helping each other we were always having fun laughing that kind of stuff and if anyone needed help whoever it was they would stop what they were doing if somebody help and just go help him that's just how we work. [Participant 8]

Yeah probably to my growing up years. [laughs] You probably made me think about that 'cause I, I hardly ever think about it but... Going to school and scouts and that and how my attitude was the same then. I don't guess I thought about that for a long time.
[Participant 21]

Social interactions with others of the same age supervised by adult role models with the structure of rules, mottos and creeds, and other expected behaviors tend to influence the development of children and adults. Fraternal organizations that are predominantly aimed at adults such as

country clubs or lodges may also influence individuals beyond childhood. The influences may impact how decisions are made at work.

Military

Similar to the principles of fraternal organizations, similar guiding principles are experienced in military life and differ between the branches. Two participants that served in the military and two other participants who had parents that served in the military seemed to have a high drive to give more at work. One participant mentioned that consequences in the military influenced how tasks are viewed in civilian work roles.

Well, I think that, just given a task, you have to do it, there's no there's, there's no turning back and saying no I can't do that. Um, and you know and being mature enough being responsible for you know the mistakes and, and credit, and credits for what you do accomplish but you you know you have to take the good with the bad and have ownership of both parts of it. So, I think that's always helped me all the way through different careers. [Participant 19]

Bourdieu's (1977) Theory of Practice described the process of how practices originate by explaining the interactions between the concepts of habitus, fields, and capital in the following equation: $(\text{habitus} \times \text{fields}) + \text{capital} = \text{practice}$. Habitus refers to the sum of all an individual's dispositions, fields refer to environments in which individuals interact socially with others, and capital refers to the status of the individual in the field. Some could argue that the methods used by the military to unify members and build teamwork can strip away portions of a person's dispositions and instead indoctrinate the individual with other desired characteristics. Instead, an argument can be made acknowledging that methods used by the military undoubtedly influence the habitus. The habitus grows from the new experiences and influences how decisions are made in the present and future. The dispositions that affect decision making acquired from influences prior to military influences still exist although may be suspended for a period of time, then may reemerge as the presence of military training influences subside and the individual reenters

civilian society. In other words, from a Theory of Practice perspective, the military influenced person must interact with others while in the military field but also with others while in civilian fields. Thus, the individual must flex according to the rules of either field. The individual will retain influences from the military field, however, and at times will act based on those influences as appropriate to the other fields.

I grew up on a military base, so, um, there's a lot of, a lot of that that enters my mindset as well. [Participant 17]

I think in the military on... like if you have an inspection or you're performing, um, you're held accountable. You know, you know if somebody is checking on you and you're, and you're accountable. And, and, sometimes here or at work not everybody's held accountable, and, and all people slip up and... It's a little more um, frustrating to try to accomplish something if if not not everybody is onboard that's above you too. [Participant 18]

And my grandfather was a Lieutenant Colonel in the Air Force and that's how my parents met because both of their parents were in the Air Force, and I think it was a strict household, not strict as in um... Oh my mom was really, really a loving caring mom, but I, they, a very organized household. So, you're probably right. Very organized, very clean. Uh, definitely I gotta think I had a lot of chores but my mom worked really hard to make sure that things were precise and in place and so that is probably.... [Participant 20].

Similar to the rules and structure from experiences with fraternal organizations, military experiences influence how decisions are made including decisions made at work. The influences may also translate to the children of individuals who have served. The next section discusses the work context in which individuals interact with others in a work environment.

Category 2: Work Context

Context refers to the collective opportunities and constraints offered by situations in an environment of social interactions between the individuals in the environment. Context can serve as a main effect or interact with personal variables such as disposition to affect organizational behavior (Johns, 2006). Thus, the work environment is composed of a variety of social

interactions and social statuses that affect the culture and perceptions of roles and responsibilities of the employees. Much like pegs on a vertical pegboard, workers begin to learn how to navigate among the interactions, how to fit in, and attempt to acquire and maintain status positions within the work context. Still others may rebel against the norms at play on the pegboard, resisting and railing against the positions and social statuses and at times may influence others to withhold extra efforts. Many observe the interactions between either end of the spectrum of workers and may decide to act depending on how situations are experienced and handled in the workplace by others who possess differing degrees of social status. Types of status that emerged from participant responses are discussed in the following sections.

Hierarchical/Responsibility-Positional

Among hourly workers, some hold higher positions that entail supervisory responsibilities such as a line leader or team leader. To acquire and maintain the higher positions, employees consider doing more and may be selected for this behavior. Six participants discussed the additional responsibilities expected by the organization associated with holding a higher title or alluded to achieving a higher title as a career goal. The participants who held a higher position than the entry-level, front-line positions discussed challenges of leading others and were aligned with and committed to the organization.

You're trying to and help them with their jobs, and help them out, make their jobs easier so they can function but also trying to keep them engaged in what they're doing so they don't get bored or, or lackadaisical, I should say. [Participant #3]

That's about it, make sure the flow is good through, through the work center, and if we need to move things around to create a better flow or whatever you know we have to kind of make some adjustments but basically my responsibility to escalate any issues that happen any down time and then just watch the flow whatever needs running right if we have issues like, make getting maintenance out there to fix machines or other support staff that would help, um, getting the machine back up and running. [Participant #6]

Four of the participants mentioned that choosing to take on a higher position in the organization was due to parental influences, one participant was influenced by military experiences, and one participant rebelled against poor parental influences and rejected influences from peers to take on the extra responsibilities.

Valued/Needed

Employees who resist perceiving the job role from a narrow perspective and instead look beyond minimum role responsibilities for other opportunities may expend discretionary effort more often (George & Jones, 1997). Almost all participants described the value of having a reputation of being an upstanding, reliable employee as a type of status in the workplace. The status was described independently of the role held in the organization's hierarchy. Others strived to learn additional job duties so that other tasks could be completed when opportunities arose. Two employees realized that acquiring more knowledge was valuable and requested to work in other parts of the facility when the work in the assigned part of the facility tapered off.

I mean I guess I'm a valuable for to them in a way that I know areas so I can just flex if they need the help. [Participant #7]

Usually what I do is, I..., I will never come I I don't have a direct spot where I instantly go in the mornings, I usually always come in down to the team leader and say hey where do you want me? I'm one of those people to fill in when someone's on vacation or someone calls in it's not a big deal because I can always you know usually 9 times out of 10 I know the job so I can I can flex around where I'm needed. [Participant 11]

The valued/needed status is perceived by both low and high tenured employees, but employees who are lacking in position or seniority may embrace becoming valuable to attain a higher status.

When it comes to our reviews too it also comes off of some of the numbers come off of how long you have been an employee here so you know someone who's been here 30 years is definitely going to have a higher number in that category than I would you know being here five years. But what makes a difference too like the flexibility and people person and if you start conflicts or confrontational with others... [Participant 11]

The perception of being valued or needed may be key to staying with a company and building cohesiveness among fellow employees. Motivation from the perception may also lead to higher commitment and engagement at work.

Positive Reinforcement/Positive Aspects of Work

Many employees respond to positive reinforcement from management and the ability to find positive aspects of the work context. In the responses from 6 employees, advantages of working with the company were identified.

I just saw it as, do it the best way I can and, and uh obviously [company] like all companies they're not all perfect but they they offer really good benefits which helped me with my family when the kids were born you know that's one thing I can say about [company] is they offer very good benefits referring to medical, vision, dental, and you know they took care of me and my family, so to speak, if you know what I mean. When it comes to medical things with my boys and my daughter. [Participant 1]

I mean, obviously a pay raise, we got a percentage more. Um, the pay was definitely there in in and they would work with your hours and work with your your personal life the best that they could you know they kinda stopped the attendance point system or you know getting in trouble with attendance they, they worked with us a lot more so that showed us that they were willing to work with us if you were willing to come in in in sacrifice your time and help us out. [Participant 11]

Um, I get a lot of input from the people that are by me, I get my input from my team lead and my supervisor. [Participant 12]

Also, employees may experience positive emotions from experiences in the work context.

Eighteen of the 25 participants expressed positive feelings from expending discretionary effort.

Yeah, it feels good making sure nothing like terrible happens and making sure everything still gets back on track. [Participant 22]

It makes me feel good knowing that um, we're accomplishing everything we need to accomplish to make our team successful. [Participant 25]

Three participants relayed expressions of relief after the extra efforts expended led to positive results.

Yeah, like it's just sometimes like [unintelligible] I don't think it's gonna work or something and then like it's like hot or something and then and I'm not sure if it's going to work and it does, I don't know, I feel relieved by it worked I guess. [participant 9]

Benefits of the positive feelings received from doing more at work may reinforce future effort expenditures and may be received positively by other employees.

Coworkers

Although the unit of analysis in this study is the individual employee, employees that work with others in the same vicinity will undoubtedly experience social interaction and corresponding influences. Three participants discussed peer pressure and a sense of belonging with coworkers having an impact on the perception of work.

I'll say some of it too is from peer pressure you uh, working as a team you want to keep up you don't want to be the one that's holding anybody back. And I think said that it's a mindset that you gotta get set in your head to me my day goes lots faster then just hanging out. [Participant 3]

Not that I can think of. Everyone that I have trained pretty much sticks with it in my they're pretty good at it they go and help they do that they just help out after I them that. They realize that is a part of you're part of a team now and the way to success with the team is working together and all that kind of stuff... [Participant 8]

I am I guess I am thanked often I'm well thought of, everything that I can hear I hear from counterparts you know occasionally they'll talk about other people and their efforts and so I'm not part of that conversation so I guess that's a good thing but other than that haven't been singled out for any accommodations or anything but you know I think that this is asking to do this was part of that I've been asked to do a couple different meetings that others haven't been so this is I guess the overall general treatment that I'm getting I guess I assume I'm doing a good job. I've never been talked to about any disciplinary actions and so I guess I guess that's my gauge. [Participant 12]

Um, I think they still like where they work, and they want to succeed, and we have goals to meet and... I think they are driven by wantin' to do a good job and not let their teammates down, or their coworkers. [Participant 18]

Employees who observe other employees expending discretionary effort as norms and receive positive feelings from the group may be more likely to reciprocate.

Seniority

One type of status common in manufacturing roles is the amount of tenure or seniority an employee has with the organization. Benefits of having seniority such as more paid time off and selection of positions are used by manufacturing organizations as incentives to minimize turnover and provide a goal for employees to reach, but at times may dissuade employees due to perceived unfair labor practices. All of the participants included the number of years worked at the company after being asked to describe the role in the organization. The amount of tenure employees have with an employer often results in benefits from the organization aimed at retention. The perception that seniority has more status relates to the amount of experience and knowledge acquired over years of tenure, along with an associated perception of value to the company. However, some employees leverage this status and may ostracize new employees.

I learned over the years that I personally myself became more valuable to this company because uh, of all the different jobs that I could do. [Participant 1]

So, I know when I started here there's a lot of people that work here that have been here 20 plus years. I was amazed how many people just wouldn't even acknowledge me like and not everyone but some you know and it's like so I look at people like that and I'm like I don't want to be that way you know even, even if I work here for 20 years I'm not going to, I don't want to become this bitter person you know? [Participant 5]

...people who work here, you know they are a little bit older they get kind of angry and they don't you know they don't they don't tend to like help others they just like to stay in an angry mode and they just kind of be stuck there, they're kind of stuck there and they're just you know, new people they're just like, no, I don't want to train you, but training is just part of the process. [Participant 7]

Some employees retain privileges that were offered as incentives in the past with the company. For example, more senior employees may have a pension that was made unavailable to newer hires. The benefit may cause newer employees to feel less valued and less willing to expend extra effort as more senior employees who may have a deep appreciation for the benefit

and less likely to leave the organization to not lose the additional income to prepare for retirement.

Right, there, you know this goes even further down I would say like I've got a little more of a tied to the company 'cause I've been grandfathered in. We had a pension plan when I started here and then the older employees still are grandfathered in, we still have the pension. So, anybody new, the new hires, do not have a pension plan anymore you know so you don't have as much in the company as uh, what they used to either I don't believe you know. [Participant 15]

Seniority may also be used as a classification of status among employees. Employees with higher seniority have been able to acquire experience, knowledge, and a reputation with the organization that an employee with less tenure may not have. Also, more senior employees may be able to disregard newly hired employees without repercussion and refuse to transfer knowledge until the employee has proven commitment to the organization.

Category 3: Disposition

Disposition may be described as an apparent or underlying resilient tendency or inclination to act in a certain manner in a particular situation and may also be referred to as an individual's personality, character, or mood. Individuals may take on different dispositions depending on the environment. For example, an employee may act very differently at work than at home, church, school, or a restaurant. Dispositions develop in a variety of contexts and assist with understanding of the context, how best to interact with others, the ability to learn, adapt over time, and deciding which statuses are more desirable and worth striving for.

In the workplace, positive and negative dispositions exist. Many participants noted differences between employees that consistently meet or exceed organizational expectations and employees that perform to minimum role expectations. Achievers consistently perform higher for a variety of reasons. One participant described the desire to be known as a reputable employee.

I guess I just want to be a good employee you know. I don't want, I want, I want to do good work. I want people to think I'm a decent person that, you know, I'm a good worker. I don't want to be thought of as, you know, poor worker or a slacker or somebody that makes a bunch of bad parts. [Participant 4]

Conversely, Dissenters tend to disagree that extra effort should be offered and aim to dissuade others from contributing more. One participant attempted to explain why dissenters may not choose to exert extra effort.

I think it says some just some of it is just the only thing I can think is partially bad attitude, you know with a it's not my job, it doesn't matter anyway, I don't have time, I gotta get more parts out. [Participant 2]

Finally, there is a larger group of employees who watch the interplay between the Achievers and Dissenters to determine which course of action to take (Corace, 2007; Whyte et al., 1955).

Employees are Different

Although employees in manufacturing take on similar roles, each individual retains particular strengths and weaknesses and different personalities. Eleven participants acknowledged that individual employees are different. One participant has interacted with employees perceived to have high potential due to education level or other attributes. Another participant discussed employees that did not acclimate to the work or the work context.

I do I really do 'cause like I said it everybody is different you know the background how they were brought up schooling education everybody is different but if I I have to admit I hope I believe I've helped quite a few people here move up I've worked with some people that have had college some degree of college education and you know I give you an example I've trained a couple people on the brake presses back in steel and and they were very smart and they understood they caught on real quick on running a machine and the more I got to know 'em the more I thought to myself, man this guy doesn't belong here, he belongs up in the office, corporate up in the office somewhere because I didn't want their education to go to waste and being a machine operator. You went to college for a purpose you know what I mean? [Participant 1]

Um. [laughs]. There's a lot of we'd run with probably you know temps you know, people that work, temps or so and that so you had a fair amount of those rotating through so some some of 'em you would get that were real good and others you would get you

know, they didn't, you know that you can tell they didn't care for this there for the time being you know? [Participant 15]

Other employees discussed differences in fellow employees by personality differences or approaches to issues at work.

Not really. I think everybody everybody's different. I think everybody has different motives everybody has a different personality. I I just just want to do my part you know, that's all there is to it. I, like you said I get I get satisfied satisfaction from doing a good job I don't get any satisfaction from doing a bad job. [Participant 4]

I mean sure, uh, a lot of people a lot of people having drama with each other I look at it as not everyone's alike, we're all different. I just try to be a person that can, kind of bring everybody together that's how I was in the home [unintelligible] I try to be above the drama and be able to work with anyone I guess, is the best way to say it. [Participant 5]

For sure, but I have a very eclectic mix of people out there and I love every single one of 'em it's just there's so vastly different. You can, I have three assembly lines of four and then two people that work offline and at any given point in time if you get the wrong mixture of four out there it can erupt into chaos. [Participant 13]

Identifying Achievers/Dissenters

Individual performance was noticed and discussed by participants. Low or high performance was considered in labeling employees as bad or good employees. Thirteen participants explained differences between good and bad employees.

I think from what I see in my experience working with other people and I'll be honest with ya, there there are a lot of good people here, really good people here, that care either by the company or care about supporting their family. Now you know everywhere you go you gonna have your people that one way or another don't don't think they're getting the right treatment or [unintelligible] are not getting their fair shake referring to promotion or pay rate stuff like that but I think I think it just comes down to the individual itself just my opinion alright. [Participant 1]

I guess I just want to be a good employee you know I don't want I want I want to do good work. I want people to think I'm a decent person that you know I'm a good worker. I don't want to be thought of as you know poor worker or a slacker or somebody that makes a bunch of bad parts. [Participant 4]

There's a lot of people like me, um, that work here. I think that the majority of 'em though just kind of gave up almost today what's in it for me kind of attitude and I don't say that I come in to work every day with a good attitude but I also know that when I

come in and I cheer somebody else up, it makes my day brighter and their day brighter and ultimately everybody else's day not as crappy. My thing is if you viewed work [unintelligible] to. It's going to be a lot harder than what you needed to be but if you come into work and your having fun with your job and you're talking and you're socializing, you know, you are still getting your work done it doesn't feel like work as much so again your attitude defines how your day, your month, is gonna go you know and I think that when people are happy productivity is higher. Your people... if everything's closed better so your productivity is going to get done faster or smoother I think attitude for them makes a big difference in communication and if you don't have either of those those are those people that are low on the, on the review... [laughs]. [Participant 11]

Um, ok. There's a lot of us that are on a, that are at entry level position and then we are capped out at a certain pay rate. Um, and there's people that do less. They don't get an occurrence if they don't rotate. They don't, aren't picked to learn other positions, to flex into other areas. I don't know why, but it might be... I don't know if it's they based it on their, what they think their intelligence level is or their strength or just, just... [Participant 24]

Participants who regularly strive to perform to a higher level, or Achievers, seem to receive satisfaction when coworkers are also contributing to a higher level. Many of the participants did not appreciate a lack of consequences for employees that resisted employee norms and performed at the minimum of role expectations. Consequences for employees that perform at the minimum level may be difficult to implement since the responsibilities for the roles are being met.

Just the Way I am

Twelve participants were not sure why expending discretionary effort was not considered a normal activity. Instead, participants discussed doing more at work as simply part of who they are.

It's, it's either in you or it isn't and to me [researcher's name], you can see people since you work on the, you work on the floor too? [Participant 3]

People expect that out of me, and I expect that out of you know people I work with that's just the way I am. Like I say, I don't I don't really think that I expect any more out of anyone that I wouldn't expect out of myself. [Participant 4]

I don't know, it's how... I've always been that way through school or anything, I've always if someone needs help, I automatically go and help them. I mean, it's probably because. I don't know why but this is something I feel that I need to do is help people 'cause if they need help and I mean if they need help if they're afraid to ask for help or something I mean I feel like I should help them. [Participant 8]

I don't know it just comes naturally. [Participant 9]

Yeah, it's funny it's reminding me of something is you were saying something about going out of your way. One day I brought a scraper into work and I would scrape all the ladies' cars and my boss is like you don't have to do that, and I'm like I know but you can't just let a woman set, stand there and watch her scrape her car off, you know, that's kind of an extra thing you were saying it's just the way I am I just couldn't sit there and do you know what I mean? [Participant 10]

I mean, I guess that's just kind of who I am. If there is a job to be done, I do it. Um, just the way I was raised. [Participant 23]

Participants may also have attributed doing more than what was required as the right thing to do.

Other participants considered that expectations of parents had an influence on the individual personality and decision making.

Working to the Best of Ability

Some employees perceived that working to best of the employee's ability was an ever-present expectation from management. Five participants discussed extra effort as not being perceived as extra at all.

But I still did my job and I did it to the best because you know they I was asked for a lot of times you know hey can you send [name] over here or you know that's my name [name] and so [name] you know 'cause I've done the job well and I'm dependable. So... [Participant 1]

I mean, to me it's not extra I just do what I need to do to get the job done I gotta put my time in and make the best part that I can, and as many and... I don't really consider anything I do to be extra I guess I just, you know, try to do my best all the time. [Participant 4]

Not considering extra effort to be conditional may be linked to high work ethic. Participants with a high work ethic may simply work harder and not think much about it.

Willing to Do More

Motivated employees may be in a state that is more open to the expenditure of discretionary effort. Ten participants expressed instances of the openness to give more effort when the situation arose.

So there's multiple, like I said multiple jobs different areas and it just depends on yourself if you're willing to learn other areas and how fast you learn different areas and I know I know about maybe 75% of the area there so there's a couple like building I don't know how to do so I don't not like normally help but if I can help in any other way other than building you know how prep or whatever I need to do, you know, that's something I would flex for. [Participant 7]

There are times when other lines if they need help if their [unintelligible] have stuff they need another body to help out or they're short short staffed I'll go over I'll just flex wherever I'm needed to be honest with ya. [Participant 12]

I think it's a pride, pride thing and I wanna give it 120% to make sure we all succeed even though it's you know my department. It, I would always say it's a team effort even though you know, I would come in and do it I would still you know, make sure that 2nd shift knew that they got it done for me even though I allocated it and all that kind of stuff, but, yeah I guess you could say it's a pride thing but, in the end I want to make sure that customers are getting what they're supposed to get, because I want to retire from this place. I don't want to have to look for another job someday because we're losing customers and they're not getting what they want. So, I want to make sure [company] looks good to the customers and succeeds. [Participant 16]

I just like being involved and I like being able to make a difference, that's it. [Participant 21]

Employees who are motivated to take on extra responsibilities are very valuable to achieving results and should be encouraged by management when appropriate.

Category 4: Action

For the purposes of this study, action refers to the practices of exhibiting discretionary behaviors from choosing to exert effort beyond role expectations. Many managers are especially interested in actions taken from employees exerting extra effort. For this study, beneficial behaviors towards other employees and the organization are the focus. Predominately, behaviors

that emerged in the interviews were employee interventions to minimize efforts of others at the moment or in the near future. For example, employees described helping behaviors as identified in George and Brief's (1992) research of organizational spontaneity, a subgroup of action oriented organizational citizenship behaviors in the workplace. Also, contributions of time not scheduled by the organization were discussed. Many participants stated that actions were taken outside of their role because the tasks "had to be done." Oftentimes the influences that were linked to taking action were from parental or military influences, influences that originated from people in a dominating position. Following the actions taken, a feeling or a sense of relief was experienced after the effort was expended and the results were positive.

I'll find myself possibly having to get on a high low [forklift], move stuff around and keep moving. For me a good opportunity to do that is when everybody's on break.
[Participant 3]

Yeah, like it's just sometimes like... I don't think it's gonna work or something and then like it's like hot or something, and then and I'm not sure if it's going to work and it does, I don't know, I feel relieved by it worked I guess. [Participant 9]

Most participants described discretionary behaviors in two main areas, helping behaviors and contributions of time outside of the participants' scheduled hours.

Material Handling

During the interviews, it was apparent that participants had recurring issues with availability and organization of materials used in the manufacturing processes in the facility.

Five participants commented on frustration from the lack of organization of materials.

So, and if it doesn't get done that affects the people that are coming to work the next day and not be able to work, and it would have, it would have caused us to have to work the weekends just all the ramifications and there's like might as well just gut it out right now and get it done and not get set back any further 'cause we're on a pretty strict uh schedule here, so... You get set back it just lingers and piles up. [Participant 18]

Three participants expressed the ability to move materials on wood pallets with forklifts to assist in accomplishing tasks and projects more efficiently.

Yeah, so it myself I know what's hot and what has to get out so I'll find myself possibly having to get on a high low [forklift], move stuff around and keep moving for me a good opportunity to do that is when everybody's on break. Everybody's out and away and then I can just get things where they need to be and progress a little quicker that way. [Participant 3]

Um yeah. Um, we had um actually in another plant and they were moving our department to this plant and didn't really get a very clear plan on what was supposed to happen so I actually came in on a weekend and moved product from one plant to another plant and it was like I want to say it was like 12 hours on a Saturday And yeah there was nobody else here and I was like well who, you know there was no plan so I basically stepped up and came in and organized that so that it would be ready to go on a Monday. [Participant 6]

Um, I can do it, I don't really have to, um, but it's just easier for me to come in early and get stuff done before people get here and start getting bugged for questions and I help people who if they have problems, I try and help figure it out and stuff so it's a lot easier for me to move loads when no one's around but you know asking for stuff. [Participant 10]

Material handling was pertinent to this study because employees that assisted with the material issues did so despite not being part of the role expectations. The extra efforts did not seem to lead to a resolution of the situation that led to the need to exert the efforts however, and may result in additional labor costs as employees came in to move materials before the shift or during unscheduled time during weekends.

Helping Others

Many examples of discretionary effort that were described during the interviews were instances of offering help to others that were struggling or unable to keep up with the flow of work. Other examples included staying behind to help others finish assigned tasks so that the employee could leave on time or soon after the scheduled end of the shift. Three participants described these behaviors in different ways.

I'll just towards, like go towards him and like, help him pack, like pack it out, band it, whatever I gotta do so he can also get the next unit ready as we go through the line is moving quicker I mean that's what I do not everyone does that but um, you know I just, we are team whether we like it or not, so it is... you just flex wherever you can.
[Participant 7]

It feels, it makes everybody feel good to everyone to keep everything running smoothly keep it going and just working all together I guess, I don't know. [Participant 9]
It helps people get things done. Um, I like helping people you know I just... that's kind of my thing. [Participant 10]

A common theme that emerged was the choice of an employee to intervene to avoid additional requisite effort from other employees. Contributing time before an employee's scheduled shift or going in to work during an unscheduled weekend is discussed in the next section.

Time as Support

Another manifestation of discretionary effort was explained by four participants as a contribution of time that the employer did not require, such as break times, unscheduled weekends, or coming into work prior to the scheduled shift start time.

Yeah, I mean, if I walked away and not done anything we would have came in Monday and then we wouldn't have had enough work to stay busy all day and we have enough in our schedule that busy we're working overtime so just a way to keep things flowing keep work in front of the machines [Participant 6]

I usually come in a half hour early and I get the line set up before everyone else comes in.
[Participant 9]

The intention behind the contribution of unscheduled time is to help others or the organization, and intended to avoid extra work, but the selflessness of going to work when not required is distinct from helping others when the employee is required to be at work.

Using Skills

Nine participants described discretionary effort using skills in the workplace. Using skills enabled higher efficiencies for completing work, and at times would positively influence employees who worked together.

Yeah you know and a lot of it is skill set because you know you can kind of see what's comin' and you're familiar with the part. You can foresee things you know some things run better on other machines than others and that all kind of helps you know. [Participant 2]

Um, when COVID first hit the plant, there was, I would say over $\frac{3}{4}$ of the plant was gone, which there was a lot of people in our area that was gone, so, I would come in and do my job and then I would, once I got a job, I would flex over and do the like, sort of things in our area come, you have to do it in in in in an order I guess it's per say so I would follow the order and do like 4 different jobs and it's like I'm going in a square. It's not what I needed to do but it's something that had to be done because being shorthanded on people you you gotta do what you gotta do in other out is just slow. [Participant 11]

So, yeah, I mean, they have a so we got our standard work and stuff that we'd go through and how if they were, if they were working the lines, on specific jobs and what they were doing and stuff, so we would explain what they were doing and then assign them a specific task and why they want it done that way in a particular way so that a lot of times it's you know it might not affect you so much, it's how it affects the next person down the line you know is how you might want it it's gotta be done like this so the next person can get their job done in the time that they need to. [Participant 15]

Training employees to gain skills and the encouragement of using the skills improves efficiencies and flexibility during unplanned occurrences. In some instances, learning and using a new skill may result in added benefits such as higher motivation and morale.

Beneficial Effort

An important caveat to this research is that positive actions towards the organization is the focus of the study. The voluntary transfer of knowledge from acclimated employees to new employees was discussed by four participants.

When I came to the wood plant, everybody that trained me wasn't holding back they were telling me everything that I needed to know which made my job a lot easier you know all the little tricks here little tricks there you know to keep the machine running so... [Participant 1]

You know, pretty much show 'em, you know show them what the process is. Then show 'em the finished parts have 'em hopefully there's somebody that can work with you 'cause it's a two person machine you've got two people they called the operator and the tailer. So hopefully you've got somebody that's working with you and between the two of you you can work and show them the process and then once they understand what processes what's going on then you know then more the one on one to show him what

what their particular part of the process is and then once they once they try it of course it's you know it's kind of like teaching somebody to drive once they once they start then you gotta give 'em pointers, and you guide them along, things that, you know, show 'em things that make the job a little easier. [Participant 4]

you're trying to get them to understand where you're at what's going on what's our goal for the day and even if they consent to think about their weekends a little bit you know are we going to be here Friday or are we going to be Saturday and they gives them something to shoot for. [Participant 3]

Twelve participants described performing more than required as a benefit to the organization and coworkers by avoiding other work.

You're not necessarily just babysitting people but you're trying to and help them with their jobs, and help them out, make their jobs easier so they can function but also trying to keep them engaged in what doing so they don't get bored or or lackadaisical should say. [Participant 3]

Yeah, I mean if I walked away and not done anything we would have came in Monday and then we wouldn't have had enough work to stay busy all day and we have enough in our schedule that busy we're working overtime so just a way to keep things flowing keep work in front of the machines. [Participant 6]

It just makes people's job easier, and it makes everybody think, everything moves smoother I guess. [Participant 10]

Well, what would happen is they would put undue pressure on other people and it would, this job will turn people, their stress level through the roof. So, you know with that being said I don't, I don't like to, I don't like to see my fellow, fellow employees, you know, having to stress out over something like that it's just easier for me to shoulder it, and you know, do it. [Participant 19]

Efforts that were not beneficial to the organization or others were also discussed leading to the classification of the Dissenter group of employees. However, dissenting behaviors may be a basis for future research and considered beyond the scope of this study.

Memo Writing

Memo writing allows the researcher to step back and consider ideas as data is analyzed throughout the research process and is a space to make comparisons between bits of data, codes, categories, and concepts. Using the Charmaz's skeleton metaphor in Chapter 3, memo writing is

the connecting tissues connecting codes and categories that frame the theory. Memo writing brings all the data analysis components together, begins the learning through writing process, and charts a path for theory construction (Charmaz, 2014). Writing about what is being learned may also identify gaps in the analysis, aiding in theoretical sampling. While writing memos, Charmaz urges to “keep collecting data, keep coding, and keep refining your ideas through writing more and more further developed memos” (Charmaz, 2014, p. 181).

Notes of ideas formed during the comparisons between codes and data formed memos for further analysis. Memos about the emergent categories were written throughout the coding process and became more detailed at the category step in the process. Charmaz (2014) recommended keeping a journal for writing memos, and “having a notebook with you at all times” (p. 168). Memos were written in notebooks while listening to participants during the interviews and during the transcription phase. When ideas emerged while at work or elsewhere, memos were written on Post-it notes and typed in the Notes section of a password protected smartphone, then collected and organized with other materials. The memos were also centralized and organized with the other research materials. Examples of memos written after the first 10 participants included noting that participants tended to explain how they made choices by responses such as “that’s just the way people are,” or “that’s just how it is.” The responses pointed to individual characteristics as possibly having some responsibility for making choices including the choice to expend discretionary effort.

Other memos emerged from responses that included a tendency to focus on influences from upbringing including parents, coaches, or scouts. Memos noting this tendency allowed for the deduction that the choice to exert discretionary effort may not be a conscious act and led to the development of codes that culminated in the category Past Influences. When participants

discussed the differences between employees who chose to expend discretionary effort and employees that do not, memos were written as a reminder to keep in mind that the participants that volunteered for the research were already expending discretionary effort by participating. The note impacted the development of implications but also was an assurance that the sampling was purposive in nature. Another memo inductively explained the impact of value in the study.

Some employees feel that what they do is valued, even if management doesn't communicate value. [Effort expended causes the employee to feel] Part of something bigger than themselves. Actions taken have a larger impact [personal memo].

Yet another memo described the lack of being asked by management for the perspective of the workers.

Same difficulty to get responses because they haven't been asked and don't think much about it. At times participants seemed to appeal to me to help them with their issues at work. Could stem from someone listening to them or that I had some influence, or my findings reported to the company could help in some way [personal memo].

Collectively, writing the memos allowed for the development of thoughts and alignments of the data to categorize the data and understand how the categories related to each other. The memos led to the development of preliminary theoretical frameworks and allowed for theorizing discussed in Chapter 5.

Chapter Summary

This chapter began with a review of the research question and design including methods of collecting data and subsequent analysis. Twenty-five hourly manufacturing workers who have worked on the frontline in an assembly facility participated in open-ended, semi structured interviews over a virtual platform. The participants shared experiences of voluntarily giving extra effort to benefit coworkers and the organization. Four dominant categories emerged thematically from the data coding process. Each category may be attributed with unique summary findings resulting from the use of constructive grounded theory methods.

The data from the first category represents influences on an individual outside of the work context. A family or quasi parental influence seems to be the dominate influence in the development of dispositions that influences choices that are made in other areas of one's life including work. Quasi parental family influences that an individual may be exposed to manifests in the form of fraternal organizations, military life, or interacting with members in a church, school, or sports teams. Several participants expressed a sense or feeling of relief after expending discretionary effort without negative consequences. Making perceived poor choices when exposed to the external influences may come with particular unpleasant consequences and seems to be a learned behavior that translates to the desire to avoid making mistakes at work.

The second category describes the workplace itself, especially referring to the work context that accounts for the interactions between employees, the culture, norms etc. Employees learn quickly which activities lead to acquiring certain statuses in the work context. Seniority, role in the hierarchy of workers, having a reputation of being negative and wanting to be left alone, and the perception that the organization considers the employee as valuable and needed are four types of status identified in the data.

Experiences external to and internal to the work context have a hand in developing the individual's dispositions, the third category. The data revealed that some employees are recognized as typically achieving results using discretionary effort from making positive choices. Other employees may detract from the achieving employees and instead rebel against positive choices. The majority of other employees monitor interactions with situations and circumstances in the workplace and decide whether to achieve or withhold effort.

The fourth category, Action, described beneficial behaviors from employees that expend discretionary effort. Using knowledge and skills to help others who were struggling with tasks

was identified often throughout the interviews. Contributing time as an intervention to minimize hardships and continue manufacturing processes was also common.

In Chapter 5, an argument is presented that displays how all four categories interrelate with each other and explains that managers are best suited to present a stage in which the players at work may be more likely to expend discretionary effort. The insights were derived from employee perceptions of experiences of their lives both inside and outside of work and from perceptions about how employees interrelate with each other within the manufacturing work context. Theorizing how employees make their choices within these constructs explain the perceptions of employees and allow managers to walk in employees' shoes for a moment to make creative, constructive choices to benefit employees, management, and the organization.

CHAPTER V

FINDINGS AND THEORETICAL MODEL

Chapter 5 is a discussion about the findings from the data presented in Chapter 4 and the presentation of the theory developed to answer the main research question. Answering questions of who, where, and when in Chapter 4 allowed for an understanding of the context of the study. However, it is important to mention that the explicated categories from the data analysis in this study constituted the what and how derived from participant responses, but abductive reasoning was necessary to discover the why behind participant choice to expend discretionary effort. The conclusions made from answering the questions during the research journey was based on an interpretivist and constructivist mindset approach to co-construct a theory from interactions with the participants. Finally, the abductive reasoning for answering why allowed for the development of a theory about manufacturing workers' use of discretionary effort in the workplace. A theory may provide an explanation of the phenomena, but the aim of this research was to provide a theory for understanding and also allow for consideration of the impact of actions taken within the workplace that may influence employees' choices on a daily basis.

Findings

The study resulted in three primary findings that were fundamental to the development of a theoretical model that explains discretionary effort expended by hourly manufacturing employees:

1. Expending discretionary effort may be a learned practice from one's upbringing or interacting with peers inside and outside of the workplace.

2. Hourly manufacturing employees' decision making is affected by several types of social status in the work context, namely hierarchical/positional, seniority, valued/needed, and cynical.
3. Hourly manufacturing employees view action from discretionary effort as helping others and the company with contributions of time, using skills, and assisting others who are overwhelmed.

Finding 1

Expending discretionary effort may be a learned practice from one's upbringing or interacting with peers inside and outside of the workplace.

Several participants pointed out that during childhood and adolescence, family members, peers, and coworkers were observed to go above and beyond at work. Correspondingly, the observation was transformed into an expectation that was transferred to the participant to emulate the behavior at work. Individuals identified learned behavior from an employee's upbringing primarily from family members through activities and expectations as a family. Individuals also learned behaviors from peers outside of work and family including acquaintances in youth groups, church, fraternal organizations, sports, or friends from school. Paradoxically, one employee chose to use peers as an example of how not to behave after observing behaviors that were not constructive and not supporting the employee's goals.

Finding 2

Hourly manufacturing employees' decision making is affected by several types of social status in the work context, namely hierarchical/positional, seniority, valued/needed, and cynical.

Employees acknowledged that there are differences between the types of status that different employees hold. For example, employees are aware of their position within the hierarchical roles and associated titles of hourly workers (e.g., team leader, master machine operator, etc.). Additionally, employees underwent constant evaluation, assessment, and comparisons of fellow employees to establish perceptions of status outside of the hierarchical status. The most surprising finding of this study is that some employees voluntarily engaged in behaviors that are beneficial to the organization to attain the status of a valued or needed employee, considered a higher status among their peers (e.g., Leiter & Maslach, 1998). Another type of status allowed for behaviors that are not beneficial to the company such as avoiding spending time to train new employees or resisting to learn new processes. The types of status identified in this study are based on how valuable the employee is perceived to be, the number of years the employee has worked there, actual title or role, a standoffish or cynical attitude, or possibly leveraging a combination of the four types.

Discretionary effort used to acquire the valuable/needed status may cause larger rifts and conflict between individual employees. Several employees referred to helping others and the company as favorable actions, and employees that do not engage in these behaviors as not caring, just getting by, or otherwise considered undesirable employees in some fashion. Being perceived as valuable or needed is considered important for promotion and future success in the company and overall satisfaction in the position currently held. For example, learning additional job tasks was perceived as being more valuable since the flexibility to work in different areas is heightened.

Finding 3

Hourly manufacturing employees view action from discretionary effort as helping others and the company with contributions of time, using skills, and assisting others who are overwhelmed.

The employees interviewed identified particular behaviors to describe examples of how discretionary effort was expended in the workplace. The investment of time for different purposes was referred to several times during the interviews. The practice of investing time to remove obstacles before the normal shift and during employee breaks was employed to enable production line efficiencies that benefit each employee on the production line, supervision, and the company. Other investments of time were identified to include training and coaching of new employees, helping others if employees became overwhelmed at their workstations, working outside scheduled shift times to help others who had not finished requisite tasks, and avoiding overall line stoppages and roadblocks to production line effectiveness.

A couple of points of verification should be made at this point. The employees on the assembly lines with this company retain the autonomy to leave their workstation to assist an employee at another workstation. However, not all employees chose to leave their workstations to assist another employee due to not having the requisite knowledge to assist in the requisite tasks or lacking the desire to do so. Also, some employees chose to not assist new employees or train existing employees in different processes. The following section considers the findings and focuses on what motivates the employees that chose to act outside of prescribed roles.

Motivation Supporting Discretionary Effort

Initial thoughts about discretionary effort centered around questioning what people and organizations value in the workplace, however, as findings emerged from data analysis, the question behind why people chose to exhibit discretionary effort was prevalent. The themes of

internal and external influences, helping behaviors, types of status, and the focus on the individual were most evident. After considering the influences and behaviors of manufacturing workers who decide to perform above the minimum standard, three different areas of motivation emerged: altruism, avoiding consequences, and achieving status.

Altruism

Altruism may be simply defined as “a desire to benefit someone else for his or her sake rather than one’s own” (Batson, 2011, p. 3). Altruism may also refer to helping behaviors such as “cooperation, the provision of public goods, volunteering, charitable giving, and other informal behaviors” (Einolf, 2010, p. 142). Many participants helped others because the actions seemed to be the right thing to do. However, doing things to benefit others may not be totally selfless as the altruistic employee may receive benefits in the form of positive feelings from performing the acts (Aknin et al., 2015; Einolf, 2010).

While behavioral economists have referred to helping behaviors without regard to selfless or self-promoting intentions, developmental psychologists have used the term to explain helping behaviors for moral purposes. The nurturing nature of parent to child has long been considered central to the concept of altruism and is aligned with the consideration of past influences of family interactions on employee decision making processes. Evolutionary biologists and sociobiologists explained that a species’ survival is dependent on altruistic behaviors including sacrifices aimed at protecting the welfare of groups and the tendency is considered to be transmitted genetically (Batson, 2010, Oliner & Oliner, 1988). From a psychoanalytic perspective, learned behaviors from identification with others and societal constraints cause individuals to downplay animalistic aggressiveness and help others from internalization of values and standards mostly learned in early childhood. More relevant for this study is the term

psychological altruism that conceptualizes altruism as a motivational state with the ultimate goal of increasing another's welfare. In this vein, Batson (2011) offers a more formal definition of altruism as "a motivational state with the ultimate goal of increasing another's welfare" (p. 20) but as a predisposition instead of an established disposition due to considering altruism as situationally based and goal directed.

Two potential sources of altruism motivation are empathic concern, and a personal predisposition sometimes called an altruistic personality. Besides several participants referring to helping others as "the right thing to do," avoiding a feeling of disappointment from parents if the participants did not help another person in need was described. However, an inclination towards a given behavior may lead someone to tend to be altruistic. When someone has an altruistic personality, it means not that he or she always acts altruistically but that the person is more likely than others to make altruistic decisions. Similarly, Oliner and Oliner (1988) proposed that the influence of early life experiences on personality influence perceived choices and inevitably determine if an altruistic response to a situation is realized.

Achieving Status

Four different types of status were identified by participants. The status of hierarchical position was identified, and all participants described their position in the hierarchy. Another type of status stemmed from tenure from working in the organization and benefits for promotion and even retirement benefits were associated with employees that had obtained a higher seniority. Also, employees with a higher tenure seemed to be able to resist requirements to train and transfer knowledge to newly hired employees without repercussions. Another type of status was obtained by having a reputation of not wanting to participate and a tendency to have a bad attitude. The benefit of the status type was that extra assignments were not proffered to this

group allowing the group to shirk learning new positions, training new hires, and requests of information from positions of authority. The final type of status described was the attainment of being considered a valued or needed employee. Working hard and learning new positions allowed employees with lower seniority to achieve a positive reputation with peers and management. The possibility also existed to achieve promotions from attaining the status type.

Avoiding Consequences

Participants had a strong tendency to avoid consequences from management at work. Although some participants may have wanted to garner favor with managers, instances of organizing the workplace to avoid consequences of lower production rates or having to perform extra tasks were discussed. When asked probing question about why actions were taken to avoid future issues, the tendency was to describe punishments or other consequences from parents, quasi parental figures, or military leadership for participants who had served in the military. Avoiding consequences seemed to be ingrained in several participants from an early age, leading into early adulthood in military life. In the work context, employees were able to anticipate consequences from prior work experiences and knew what actions would be beneficial.

Socialization

Sociologists tend to credit Talcott Parsons for developing socialization from a structural functionalism perspective that described socialization as a dimension of learning required for orienting and obtaining satisfactory functions in a role in the workplace (Guhin et al., 2021). However, alternatives were developed to explain social reproduction of traits to include the dimensions of agency and power of individuals. A prime example of a theory that focused on the ability of individuals to influence groups included the dialectical relationships between habitus and fields developed by Bourdieu (1977). Theorists have used the concepts described by

Bourdieu to describe how identities are developed and subsequently attain power in a context and was useful to highlight the competing influences of different and intersecting sources of socialization in individual lives.

Cultural socialization and group socialization are two types of socialization that may appear to directly support this study. Cultural socialization refers to orienting children from influences of parents or quasi parental role models. However, Harris (1995) challenged the thought process behind cultural socialization by stating that children are instead influenced heavily by differing contexts and peers. The contextual and peer influences separate the parental influences from child development and also explained why children from the same parents have different tendencies and personalities and hence make different choices. Group socialization refers to socialization after childhood and includes the workplace. Workplace socialization (Anderson & Thomas, 1996) and organizational socialization (Cooper-Thomas & Anderson, 2006) are two branches of group socialization that gained much attention in recent decades. Anderson and Thomas (1996) defined workplace socialization as:

Work group socialization is newcomer acquisition of knowledge, abilities and attitudes needed to perform a work role, and the assimilation of the newcomer into the proximal work group via exposure to its norms, psychological climate, rituals and rites de passage, and the concurrent accommodation of the work group to the newcomer over time (p. 37).

Workplace socialization aligned with and was eventually replaced by the term organizational socialization over time and was defined as “the process through which a new organizational employee adapts from outsider to integrated and effective insider” (Cooper-Thomas & Anderson, 2006, p. 492), and by Filstad (2010) as “the process which an individual acquires the social

knowledge and skills to assume an organizational role, transforming from outsider to full membership and learns appreciated values, abilities, expected behavior and social knowledge” (p. 376).

Socialization has come into conflict with other concepts pertaining to social reproduction including the lack of agency noted by Harris (1995) in children and accounted for in the concept of habitus by Bourdieu (1977). Influences from socialization on the development of an individual may still be supported, however an updated definition or theory of socialization to account for the weaknesses of the concept may be appropriate. As Guhin et al. (2021) explained:

“Such a new theory of socialization is not limited to “cultural tools” or institutions: instead, what is important is the way that people habituate particular means of normative evaluation, done so within a context that is simultaneously morally imbued and marked by asymmetric power” (p. 14).

A different concept may provide a more apt explanation for group expectations’ influence on the individual. Similar to the fields described by Bourdieu (1977), Winchester and Guhin (2019) developed the term normative frames that refer to a “group’s cultural expectations about how an actor should perform and experience a particular cultural practice” (p. 33). Normative frames provide a structure that explains how individuals perceive how practices should be carried out, including which emotions are proper, posture, speech, timing, and context. For this study, although socialization was considered in the development of a theory of discretionary effort, Bourdieu’s Theory of Practice provided a more apt lens. While socialization tends to focus on the influence of groups on the individual, the concept of habitus allows for the influence of the individual applied to the group.

Developing Theory from Findings and Extant Theory

A theoretical model was developed in correlation with the findings and several iterations of the diagramming step of data analysis that represent the conceptualizations shared by the hourly manufacturing employees who participated in this research study. The discussion of extant theory provided a backdrop for the elements of the model, and in turn, a discussion of the relationships between the elements is considered and how discretionary effort is situated within the model.

The findings in this research have many similarities to extant theory. In respect to Pierre Bourdieu's (1977) Theory of Practice, habitus is described as the collective dispositions of an individual that affect how experiences are perceived and how decisions are made. Senge (1992) discussed the term mental models as formed from "images, assumptions, and stories" (p. 5) that shape how we act and affect what we see, resulting in conceptions from simple generalizations to complex theories. Similarly, schema is a term that refers to an organizing framework that guides ways of understanding events (Bartunek & Moch, 1987; Markus & Zajonc, 1985).

Fields are described as contexts in which a disposition is developed and functions. Mary Parker Follett (1925/1995) described a field of desires in which employees find themselves when attempting to make decisions and potentially minimizing conflicts between individuals at work. From a Theory of Practice perspective, Bourdieu and Wacquant (1992) explained the relationship between dispositions, fields, and capital:

A field consists of a set of objective, historical relations between positions anchored in certain forms of power (or capital), while habitus consists of a set of historical relations 'deposited' within individual bodies in the form of mental and corporeal schemata of perception, appreciation, and action. (p. 16)

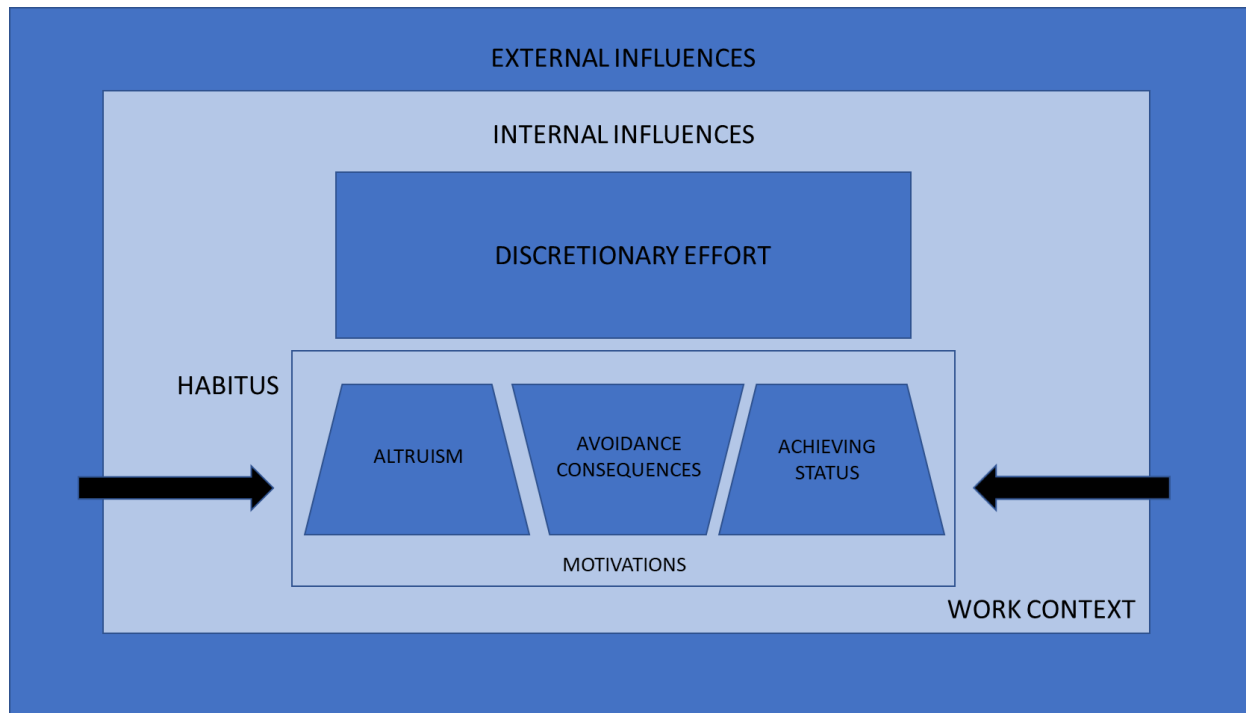
Within the field, individuals struggle to possess the forms of capital that are in play. The capital gained determines how much influence each individual has in the field (Kloot, 2009).

Theoretical Model

The foundation of the theoretical model developed from this study is represented by the two fields identified by employees in the development of the respective employee dispositions. An individual's habitus, or collective dispositions towards making choices, is influenced by interactions prior to employment and external to the workplace during upbringing and with peers. When individuals are employed by a manufacturing company, the manufacturing field (work context) affects dispositions as the employees begin to understand the workplace. The influences of external and internal fields are represented in the model as arrows pointing to the habitus. Motivations from the influences on the habitus that support discretionary effort in the work context consist of altruism, avoiding consequences, and achieving status. The motivations of the employees identified in this study are represented by a supporting structure that supports the construct of discretionary effort. As Morgan (2006) explained:

Some people are committed to doing their job as an end in itself; others are more careerist. Yet others spend most of their energy attempting to make work life less onerous or as comfortable and consistent with their personal preferences as possible. (p. 159)

In other words, the likelihood of an individual to expend discretionary effort depends on how an individual perceives the work context based on the social influences experienced external to and internal to the work context, the perceived social status attempted or acquired within the work context, and the situations currently in play within the work context itself. A theoretical model displaying each of the characteristics is displayed below as Figure 9.

Figure 9*Theoretical model of discretionary effort in manufacturing*

Chapter Summary

The introduction to Chapter 5 began with a discussion of discovery carried from Chapter 3 and 4 including how the questions of who, what, when, how, and why applied to context and abductive reasoning to develop a theory to answer the primary research question. A discussion of the three primary findings from the study followed. A theory developed with constructivist grounded theory methods, co-constructed with the research participants, was compared to other extant theories as a backdrop. In Chapter 6, conclusions from the study are discussed, limitations and implications of the research are presented, and recommendations for additional research are provided using this research as a supporting foundation.

CHAPTER VI

LIMITATIONS, IMPLICATIONS, AND CONCLUSIONS

The focus on employee choice in this research is timely as, at the time of writing, employees are taking full advantage of the ultimate choice to remain employed to the employer including resigning from jobs to improve lives and careers to such an extent that employers are having difficulty keeping acceptable staff levels. The COVID-19 pandemic allowed for many employees to work from home, resulting in newfound freedoms, flexibility, and autonomy to find other work that better suited the individual as the requirement to return to the workplace occurred. The metamorphosis of the employment landscape began early in the pandemic with the revisitation of the term “The Great Reset” (Schwab, 2020) to rebuild world economies after the pandemic subsided. Another term followed coined “The Great Resignation,” by Anthony Klotz, an associate professor of management at Texas A&M University (Klotz, 2021) that described an unusual number of employees simply quitting jobs. A third term called “The Great Reshuffling” (Christian, 2021) referred to an unusual number of workers changing jobs that seem to be an improvement over the last job. Eventually the changes in employment are expected to settle and culminate in “The Big Transformation” (Nair, 2021) in the near future.

In Chapter 6, limitations of the research process for this study are discussed. Also, several implications for theory and future research are identified. After the discussion of implications and limitations, conclusions from the study were recognized by taking into account the conceptual framework displayed in Chapter 1, the review of extant literature in Chapter 2, descriptions of the data in Chapter 4, and the findings identified in Chapter 5.

Research Limitations

The first limitation of this study was the challenges of collecting data with an online, virtual platform. Challenges of internet connectivity and equipment occurred throughout several interviews requiring the participants to repeat answers often and interrupted the flow of responses that could have impeded discovery. Although some participants may have felt more comfortable speaking without the presence of a researcher in the same room, others may not have participated as freely. When both the researcher and participant spoke at the same time, the microphone picked up both voices simultaneously and were mixed together, resulting in a corresponding loss of data at times. Also, the ability to observe the work context in this study was not possible due to the requirements of social distancing during the Covid-19 pandemic.

A second limitation commonly associated with qualitative research is that data is dependent on participants' discussions of recollections of events (Rennie et al., 1988). As Weick et al. (2005) explained, people may not know why they do something until asked. Hourly manufacturing employees may not be accustomed to being asked why they perform daily tasks and have honestly not thought much about it. Likewise, employees may not understand or even think to make meaning of experiences until they are asked and hear the words spoken aloud. One participant communicated the issues after considering responses to earlier questions in the interview.

Yeah, just reminiscing about those times and just you know what we do on a daily basis it's just you know you don't stop and think everything that you do throughout the day and, by the time you get home you're usually tired and forget about what happened at work and you don't ever reflect on those kind of questions. [Participant 16]

Gaps in memory of an event or attempts to mislead researchers may occur during interviews, but the impact on analysis is minimized using the grounded research methodologies of initial and focused coding and the constant comparative method. While many participants may

not feel comfortable with speaking with someone they have not met before about potentially sensitive issues, some participants may misconstrue accounts of experiences to persuade or dissuade the researcher (Schonfeld & Mazzola, 2012). Defensiveness or beseeching the researcher for assistance or favors such as putting in a good word with management may come into play. The researcher is required to be comforting and reaffirm a safe place to engage and receive meaningful responses, but also maintain professionalism throughout the interview process. The training offered to researchers prior to engaging with participants accounts for this concern. Also, the elements of confidentiality and rigor of the constant comparison method maintains the integrity of the data by eliminating the possibility of any attempts at persuasion or dissuasion that may be encountered during the interviews.

A third limitation of the study was the assumption prior to conducting interviews that all hourly manufacturing employees in the facility were not in a position to be responsible for other hourly manufacturing employees. However, the discovery was made that some supervisory responsibilities had been passed down to hourly manufacturing employees. The factor is accounted for by the hierarchical capital type. Also, the questions of the interview protocol were phrased to gain an understanding of why employees made decisions which supported the upbringing and peer influences independent of the influences of supervisory responsibilities for others in the work context.

A fourth limitation may be related to the ratio of men to women in this study, which may be viewed as disproportionate at 76% male to 24% female. However, census data shows that the ratio of men to women in this study reasonably reflects the ratio of men to women in hourly manufacturing roles at 73% male to 27% female per the American Community Survey (Laughlin & Christnacht, 2017). Also, gender related issues did not emerge from analyzing the data into the

corresponding theoretical categories. The differences in gender in this study were minimized by the selection of participants since tasks undertaken by most hourly manufacturing positions have been standardized for ergonomics, efficiency, and safety purposes such that employees of either gender may perform the tasks equally (Tosh, 2017). Also, differences in attitudes towards similar work have been shown to be independent of gender (Loscocco & Spitze, 1990). Additionally, the data analysis steps of a grounded study theory fundamentally remove influences of demographics such as gender, yet the theory may be applied to different gender communities (Glaser, 2007).

A fifth limitation stemmed from a perception of lack of rigor in qualitative studies. A standardized methodology such as in quantitative studies is lacking in qualitative studies (Charmaz, 1990) and the benefits of the flexibility in qualitative studies are met with criticism. A prime example is the risk of bias from the researcher as the instrument in qualitative studies versus a mathematically verified instrument such as a survey (Kolb, 2012). In grounded theory methodology, the researcher makes decisions as to which question to ask, which data to acquire and ultimately use, and organizes the data with patterns that the researcher observes. Responsibility is higher for the reader of qualitative studies to take into account the researcher's positionality and choice of lens to evaluate the phenomenon including extant theories that may have had an influence (Sandelowski & Barroso, 2002). In this study the established methodology of constructive grounded theory was employed to ensure rigor of methodology, however the fallibility of the researcher is present. Also, benefits of grounded theory studies include the development of a theory to explain a phenomenon and to identify dimensions for the development of future quantitative studies. (Schonfeld & Mazzola, 2012).

Finally, a sixth limitation stemmed from focusing on one manufacturing company in one region of the United States which may limit the ability for the findings to be generalizable to

other manufacturing companies. However, the approach to gain an understanding of how employees make decisions to expend discretionary effort may be used as a foundation to study other work contexts. The limitations listed above may have had an impact on the generalizability of the conclusions of the study, but did not diminish their significance, especially considering the rigor of the research method.

Implications

Implications for Practice

Following the limitations of the study were implications towards future research on discretionary effort. From a practice perspective, there were three topics derived from the findings of this research that may be of benefit for managers in their search to improve efficiencies and relationships with employees. Each topic was followed by suggestions for managers and were detailed below.

The first topic addressed the environment in which employees functioned. While there were interview methods for selection of desired characteristics for potential employees that could be used to leverage past influences on employee disposition, results from this approach are not guaranteed since candidates may have been coached to respond to interview questions in a particular way. Conversely, managers have a significant influence over practices within the work context. For example, efforts should be made to ensure a welcome environment beyond recruitment of new employees and both during and after orientation. Also, training new employees on easier tasks initially, then transitioning to more complex tasks as the new employee learns norms and expectations allows for a smoother acclimation to the work context. Finally, misrepresentation of new employees' efforts on organizationally based value communications such as employee performance reviews should be considered. In the current

organization, new employees were scored a zero only because of their tenure with the company. Giving new employees zeros on a performance review simply because of the time spent on the job devalues the efforts given during the review period and may allow for the perception that the employee is not valued. Instead, a minimal score could be given in the case of tenure, and equal consideration for effort given during the review period independent of time in the role to allow for a perception of how valuable the efforts were and correspondingly the how employee is valued and may in the near future.

The second topic addresses employees who have acclimated to the work environment. Managers should be interested in what motivates as many employees as possible. An excellent way to identify reasons why an employee may be unmotivated is to ask. At times participants seemed to appeal to me to help them with their issues at work. The interviews provided an opportunity for listening to concerns or a belief that I had some influence with the company leading to speaking on the participant's behalf. Instead, managers should encourage employees to become comfortable with providing feedback to determine what can be done to influence the work context to positively affect employees' dispositions. Employees should be asked about issues that are faced in the work context periodically, such as during employee performance review discussions or stay interviews, interviews focused on improving the work environment with the intentions of minimizing employee turnover (see Finnegan, 2018). Options to provide anonymous feedback (i.e. suggestion box) would also be advantageous to gain additional honest feedback and minimize fear of retaliation. Plans to resolve employee identified issues should be put in place, made visible to employees, and followed up on. Also, employees would benefit from more exposure to the people who are making the decisions in higher leadership roles.

Having direct knowledge of the obstacles that employees face aids managers to remove obstacles enabling a higher probability for employees to exert discretionary effort.

The third topic involves addressing work employee interactions that benefit both the employees and the company. Managers should keep in mind that many employees want to feel valued by the organization. Some may use that feeling to stand out among other employees. Managers that spend more time on the production floor and encouraging open lines of communication between all levels of the organization enable these feelings. Alternatively, cynicism and withdrawal may develop from not feeling valued. Employee cynicism and exclusive privileges for certain employee groups may dissuade new employees from choosing to do more than what is required.

An achieving type of disposition is beneficial and should be encouraged to other disposition types. However, the practice of expending discretionary effort to attain a higher perception of value among coworkers and managers should be considered and ultimately discouraged. It is important to understand that dispositions relate to perceptions of the work context and have a tendency to act in a particular fashion, and although durable, are not permanent. An employee with a cynical disposition and status may choose to exert discretionary effort in a certain situation within the work context, likewise an employee with a valued/needed status may choose to not exert effort depending on the situation. However, this paper discussed the overall likelihood to expend discretionary effort in a manufacturing context. Since the disposition may change with the work context, managers should strive to investigate feasible, constructive changes to the work context to increase the likelihood for employees of any disposition to exert discretionary effort.

Implications for Research

The consideration of the identified categories should be used to focus the collection of more data about the theoretical categories to continue further theoretical sampling. While prior analysis steps identified the categories and the theoretical sampling of the participants of the second facility saturated the theoretical categories in this study, additional theoretical sampling should be considered to further saturate the theoretical categories (Charmaz, 2014). Development of additional focused questions for the interview protocol would center around the categories for further clarification and refinement, the closing of any gaps, and determining a strategy for next steps for further study.

A second area for future research is to consider the employees that do not fall into either achieving or dissenting dispositions. For example, Vidal (2007) noted three different dispositions in manufacturing “worker disposition—enthusiasm, reticence, or resistance—may follow rationally from plant-specific local history and/or from how new work arrangements are implemented” (p. 205). The majority of employees are not as interested in standing out, falling into the reticence classification and prefer to blend in. Employees in the “Silent Majority” (see Corace, 2007) are a group more on the fence in expending discretionary effort, less likely than Achievers to go above and beyond on a frequent basis, yet not disagreeing with doing more either. Ways to motivate and engage this significant number of employees to expend discretionary effort more frequently needs to be identified.

A third area to consider for future research is to address the generalizability concern. Conceptually, the working definition for discretionary effort used for this paper is dated and changes in the use of the term in the literature has occurred since 1983. An updated definition along with the dimensions of the discretionary effort construct based on extant literature in a

conceptual framework would be beneficial for further study. Other organizations that manufacture different types of products could be studied to determine if the theoretical model applies and other industries could be considered to determine the model's feasibility in other work contexts.

Conclusions

Hourly manufacturing employees are arguably the backbone of the manufacturing industry. Although technology may have changed the role of the industrial worker since the Industrial Revolution, the person in the role persists and is a necessary element in many manufacturing processes. Managers will continue to rely on people to achieve results and need to understand how and why employees choose to give their all at work. Managers have direct influences in the environment in which employees work and it is expected that employees will continue to react and make decisions based on their perceptions of the environment.

The findings identified in Chapter 5 suggest that manufacturing workers operate under varying motivations and motivational states prior to choosing to expend discretionary effort on coworkers' and the organization's behalf. Doing more when conditions warrant may be a reward in itself to many employees, but meaningful rewards may also take the form of an extrinsic reward such as compensation for meeting company goals or a simple thank you from a supervisor. The motivations and practice of doing more than required may be a learned practice from mentors, parents, coaches, or peers. The threat of not doing more is also a possibility causing the worker to do more to avoid a punishment in the form of loss or avoid having to do extra work. Conversely, some employees may not want to perform more because the possibility of being taken advantage of exists. Efforts that are made by employees to stand out among other

employees was an interesting find, however, and had not been considered a discretionary behavior before in extant literature.

Employees may perform to a higher standard due to experiences with parents during upbringing or respected peers at work who work at a higher pace. For example, Filstad (2010) found that there are significant positive relationships for new employees' commitment to the organization, learning, and sociocultural interactions. Opportunities to interact with positive and mentor oriented senior employees was the moderating variable. Employees may do more simply because it is the right thing to do or complete a task solely because it was perceived as needing to be done. Other employees legitimately want to help others selflessly, to receive a beneficial feeling of satisfaction, or to feel included with the work group. For example, some employees described receiving a feeling of relief after expending discretionary effort, and a feeling of excitement if others involved the employee or used employee's ideas. Managers are in an ideal position to leverage employees' choice to do more than required by encouraging positive feelings at work, potentially benefitting the organization and its employees in various ways.

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Appendix A
Recruitment Flyer



You are invited to
participate in a research
project!

Contact Information

To find out more about this
study contact:
Shawn Andrews
Shawn.M.Andrews@wmich.edu
269-579-2366

Human Resources office
ph. #

Building a Theory of Discretionary Effort: A Grounded Theory Study

Student Investigator Shawn Andrews

The purpose of this study is
to create a theoretical
framework that explains why
employees go above and
beyond the minimum effort
required of their job.
To participate in the study
you must be:

- 18+ years of age
- Full-time employee in
the manufacturing
industry
- Willing to discuss
experiences at work

Participation in this
study requires:

- 30 – 60 minutes
of time in an
interview with
the researcher.

Appendix B
Interview Protocol

Building a Theory of Discretionary Effort: A Grounded Theory Study

Interview Protocol

- Introduction and consent to record
 - Turn on recorder
 - Explanation of the study
 - Explanation of interest in stories, perceptions; examples which will illustrate meaning
 - Length of interview approximately 30-60 minutes
 - Confidentiality
 - Possibility of follow-up interview
 - Summary of interview
 - Questions or concerns before we begin?
-
1. Background questions: Would you please tell me about yourself and your current position? [Probes: Have you had other positions here? How long have you been in this position?]
 2. What is a typical day like for you here?
 3. Tell me about a time when you felt like you wanted to give it your all at work. [Probes: What things were going on before you decided to give it your all at work? Were there others involved in the decision? If so, how were they involved?]
 4. How did you feel when you gave it your all?
 5. How did you feel after giving it your all at work?
 6. Did those feelings cause you to want to give it your all other times at work?
 7. Has your view of giving it your all at work changed since then?
 8. Could you describe what you learned through experiencing giving it your all at work? [Probes: Did you learn anything about yourself?]
 9. Is there something that you might not have thought about giving it your all at work before doing the interview?
 10. What else might be important for me to know about choosing to do more than average at work? [Probes: Did I miss anything? Is there anything else you would like to tell me or ask me?]

Appendix C

HSIRB Approval Letter

WESTERN MICHIGAN UNIVERSITY



Human Subjects Institutional Review Board

Date: June 4, 2020

To: David Szabla, Principal Investigator
Shawn Andrews, Student Investigator

From: Amy Naugle, Ph.D., Chair

Re: IRB Project Number 20-05-32

This letter will serve as confirmation that your research project titled “Building a Theory of Discretionary Effort: A Grounded Theory Study” has been **approved** under the **expedited** category of review by the Western Michigan University Institutional Review Board (IRB). The conditions and duration of this approval are specified in the policies of Western Michigan University. You may now begin to implement the research as described in the application.

Please note: This research may **only** be conducted exactly in the form it was approved. You must seek specific board approval for any changes to this project (e.g., ***add an investigator, increase number of subjects beyond the number stated in your application, etc.***). Failure to obtain approval for changes will result in a protocol deviation.

In addition, if there are any unanticipated adverse reactions or unanticipated events associated with the conduct of this research, you should immediately suspend the project and contact the Chair of the IRB for consultation.

The Board wishes you success in the pursuit of your research goals.

A status report is required on or prior to (no more than 30 days) June 3, 2021 and each year thereafter until closing of the study.

When this study closes, submit the required Final Report found at
<https://wmich.edu/research/forms>.

Note: All research data must be kept in a secure location on the WMU campus for at least three (3) years after the study closes.

Appendix D

Latest Informed Consent Form

WESTERN MICHIGAN UNIVERSITY
IRB Approved
Jun 4 2021

WMU IRB Office

INFORMATION SHEET

Western Michigan University
Department of Educational Leadership,
Research and Technology

Principal Investigator: Dr. David Szabla
Student Investigator: Shawn Andrews
Title of Study: Building a Theory of Discretionary Effort: A Grounded Theory Study

You are invited to participate in this research project titled "*Building a Theory of Discretionary Effort: A Grounded Theory Study*."

STUDY SUMMARY: This consent form is part of an informed consent process for a research study and it will provide information that will help you decide whether you want to take part in this study. Participation in this study is completely voluntary. The purpose of this grounded theory study is to construct a theory that explains discretionary effort in the workplace, and will serve as Shawn Andrews' research project for the requirements of the Ph D. in Organizational Change Leadership. If you take part in the research, you will be asked to describe your experience with going above and beyond what is required of you in your workplace. Your time in the study will involve a 60 minute interview during which you will respond to a series of open-ended interview questions presented by the researcher. Possible risk and costs to you for taking part in the study may be any discomfort you may experience when answering question and the time to participate in a 60-minute interview. A potential benefit of taking part in this study may be a deeper understand of why and how you exert extra in the workplace. Your alternative to taking part in the research study is not to take part in it.

The following information in this consent form will provide more detail about the research study. Please ask any questions if you need more clarification and to assist you in deciding if you wish to participate in the research study. You are not giving up any of your legal rights by agreeing to take part in this research or by signing this consent form. After all of your questions have been answered and the consent document reviewed, if you decide to participate in this study, you will be asked to sign this consent form.

What are we trying to find out in this study?

The purpose of this study is to investigate "discretionary effort", i.e., why employees decide to perform acts that benefit their organizations outside of what is required of them, how employees expend additional effort, and whether or not their organizations encourage it.

Who can participate in this study?

Only hourly manufacturing employees at least 18 years of age or older with a minimum of three years of experience in the manufacturing industry will be included in the study.

WESTERN MICHIGAN UNIVERSITY

IRB Approved

Jun 4 2021



WMU IRB Office

Where will this study take place?

Data will be collected remotely through one-on-one interviews using WebEx, an online virtual platform used by WMU that has been verified to be HIPAA compliant.

What is the time commitment for participating in this study?

You will spend approximately 60 minutes interacting with the researcher. You may refuse to answer any of the questions and may stop participation in this study at any time.

What will you be asked to do if you choose to participate in this study?

If you agree to be interviewed, you will be asked to engage in a one-on-one interview with a researcher and to answer questions to the best of your ability. You will be asked if the interview can be recorded. If you disagree, the interview will proceed with no recording.

What information is being measured during the study?

You will be asked to recall situations in which you chose to go above and beyond your required work duties at work. Questions involve your experiences before, during, and after making the choice, and what actions were taken and why as a result of making the choice.

What are the risks of participating in this study and how will these risks be minimized?

This research does not anticipate any probability of harm (physical, psychological, social, legal or economic) occurring as a result of participation in this research study. Your autonomy will be maximized, and fair and equitable participant selection practices will be employed. Finally, established procedures for collecting and analyzing data will be followed.

What are the benefits of participating in this study?

You will not benefit directly from participation in the study, and there will be no compensation of any kind (monetary or other means). The benefits to science and humankind that might result from this study are an increased understanding of discretionary effort in the workplace.

Are there any costs associated with participating in this study?

There are no costs of any kind associated to participating in this study.

Is there any compensation for participating in this study?

There is no compensation for participating in this study.

Who will have access to the information collected during this study?

Every effort will be made to keep your information confidential, and your identity will be anonymous. No names will be taken at the time of the interview. All records will be stored on the researchers' password protected computer, accessible only to the researcher. All audio recordings related to the research will be destroyed and/or deleted upon the completion of the study. If results of this research study are reported in journals or at scientific meetings, the people who participated in this study will not be named or identified. If specific quotations are used as evidence, all identifying information will be removed from the quotations.

WESTERN MICHIGAN UNIVERSITY
IRB Approved
Jun 4 2021

WMU IRB Office

What will happen to my information or biospecimens collected for this research project after the study is over?

After information that could identify you has been removed, de-identified information collected for this research may be used by or distributed to investigators for other research without obtaining additional informed consent from you.

What if you want to stop participating in this study?

You can choose to stop participating in the study at any time for any reason. You will not suffer any prejudice or penalty by their decision to stop your participation. You will experience NO consequences if you choose to withdraw from this study. The investigator can also decide to stop participation in the study without your consent.

Should you have any questions prior to or during the study, you can contact Dr. David Szabla at (269) 387-2053 or David.Szabla@wmich.edu or the Shawn Andrews at (269) 579-2366 or Shawn.M.Andrews@wmich.edu]. You may also contact the Chair, Institutional Review Board at 269- 387-8293 or the Vice President for Research at 269-387-8298 if questions arise during the course of the study.

This consent document has been approved for use for one year by the Western Michigan University Institutional Review Board (WMU IRB) as indicated by the stamped date and signature of the board chair in the upper right corner. Do not participate in this study if the stamped date is older than one year.

I have read this informed consent document. The risks and benefits have been explained to me. I agree to take part in this study.

 Please Print Your Name

 Participant's signature

 Date