

**THE FORMATION AND  
FUNCTIONING OF  
IDIOSYNCRATIC DEALS:  
A QUALITATIVE EXPLORATION  
FROM MULTIPLE PERSPECTIVES**

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A thesis submitted in fulfilment of the requirements for the degree of  
Doctor of Philosophy of Cardiff University

October 2021

## Summary

Using a qualitative approach, this study addresses a deficit in multi-stakeholder research on idiosyncratic deals (i-deals). I-deals are multi-party arrangements, but the tendency within the literature to prioritise the employee's perspective of these individualised employment arrangements has narrowed our understanding of their formation and functioning. The study explores experiences of and attitudes towards financial and flexibility i-deals via 57 semi-structured interviews with employees, co-workers, line managers, subordinates and HR representatives in a financial services company and a construction company.

Three sets of findings are presented and discussed. First, the research brings together the employer and employee perspectives by providing insight into employer motivations and conditions for granting i-deals, and how these correspond to employee responses. Based on these findings, the thesis proposes "market-based" and "supportive" i-deal pathways with distinct effects. Second, the findings detail why and how co-workers perceive i-deals as fair, revealing what constitutes flexibility i-deals as *needed* and financial i-deals as *equitable* from their perspective. The research highlights influences and information that inform co-workers' assessments of i-deals against these socially acceptable fairness criteria. Finally, the research explicates line managers as potential recipients (not just authorisers) of i-deals, and how line managers' flexibility i-deals can impact on third-party experiences and attitudes. These findings emphasise the need for future research to distinguish between i-deals held by individuals with and without line management responsibilities.

The research contributes to i-deal theorisation through its multi-stakeholder approach. Recommendations are made to facilitate the creation of supportive flexibility i-deals that will be perceived as fair by third parties, with additional considerations highlighted when these arrangements are negotiated by line managers. The study also acts to manage expectations regarding the benefits of financial i-deals that may have limited, purely functional outcomes and risk negative responses from co-workers when used in place of a market-based compensation scheme.

# Acknowledgements

I will begin by acknowledging and expressing my gratitude to those without whom this study could not have taken place: the Economic and Social Research Council, Cardiff Business School (particularly the PhD team), everyone who assisted me in gaining access to my research sites, and all the participants who gave up their time to be interviewed.

Thank you to my team of proof-readers: Boz, Dave, Elleke, Emma, Hannah, Pri, Mum and Dad. It had never occurred to me that so many of you would be willing to help me get this thesis across the line. You're the best!

Mum, Dad and Beth, I am so grateful for your unwavering support, encouragement and belief in me throughout the past five years. I am very lucky to have family who back me like you do.

Dave, thank you for living this experience with me. You were there through every triumph and tantrum, big and small. You took on the role of sounding board for all my ideas, and (sometimes reluctantly) engaged in countless conversations about idiosyncratic deals, organisational justice and social resource theory. You get the assist!

Finally, thank you to the powerhouse team of women that are my supervisor panel:

Professor Helen Williams - for understanding how my brain works and somehow being able to perfectly articulate the ideas I'm struggling to communicate. Thank you for all of the guidance and feedback you've given me, and for all the positivity and enthusiasm you bring whenever we talk about my work.

Dr Deborah Hann - for investing in me as much as my PhD, and supporting my teaching and career decisions. You always bring a different perspective to my research and challenge me to think about things in a different way. Not to mention, you knew I had a PhD in me years before I did. Without you sowing the seed back in 2013, I might never have returned to academia a few years later to embark on this journey.

Professor Aoife McDermott - for giving me and my work more time and energy than you can possibly have had to give. You are the kind of academic and supervisor I can only aspire to be one day. Thank you for always pushing me to produce my best work. I can't imagine how I would have written this thesis without your expertise, feedback, support, kindness and generosity. In fact, I'm not sure how anyone completes a PhD without their own Aoife.

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# 1. Introduction

Idiosyncratic deals (i-deals) are personalised employment arrangements that employees make with their employer (Rousseau 2001). The four defining features of i-deals are that they are: 1) bargained for individually, 2) heterogeneous, leading to within-group differences in conditions of employment, 3) intended to benefit both employer and employee, and 4) variable in scope (Rousseau et al. 2006; Bal and Jansen 2015; Liao et al. 2016). I-deals are wide-ranging in their contents (Conway and Coyle-Shapiro 2016) and have been broadly categorised as: developmental (to expand employee knowledge and skills and/or pursue career advancement), task (related to job content), flexibility (around working hours, schedule or location), workload (altering the amount of work), and financial (related to pay and or benefits) (Rousseau et al. 2016).

By virtue of their individualised nature, i-deals provide employees the opportunity to customise their employment terms so that they satisfy their specific personal needs or preferences (Rousseau 2005). For employers, i-deals can be an effective means of attracting and retaining employees (Rousseau 2001; Rousseau et al. 2006). Further, i-deals have been associated with numerous outcomes with organisational benefits, for example: organisational citizenship behaviour (Anand et al. 2010), job satisfaction (Rosen et al. 2013), affective commitment (Liu et al. 2013) and workgroup performance (Anand et al. 2021). The increasing research interest in i-deals over the last two decades reflects questioning of the benefits of standardised employment arrangements and advocacy for heterogeneity under certain conditions (Rousseau et al. 2016).

I-deals are multi-party arrangements (Rousseau 2005; Rousseau et al. 2006), and this research is focused on multiple relevant stakeholders' experiences of i-deal formation and functioning. Only through considering the attitudes and experiences of all those who are impacted by and observe i-deals, can sufficient understanding be acquired of how these arrangements can have optimal outcomes for organisations and individuals.

The remainder of this chapter is structured as follows. First, to provide background to the study, the research questions that have guided the project are presented within the context of the existing literature, highlighting where enhanced understanding of the formation and functioning of i-deals is needed. A brief overview of the methodological approach to exploring these research questions is also shared. Next, the main findings and contributions of the research are set out. The chapter concludes by outlining the structure of the thesis.

### *1.1. Background, research questions and approach*

Despite Rousseau (2005) stating the potential for i-deals to be used as both rare exceptions for “superstars” (p.15) and more widely for “regular people, too” (p.16), the literature has largely failed to theoretically develop i-deals as arrangements that can be offered either exclusively or non-exclusively. Instead, two diverging narratives exist regarding the basis for the heterogeneity offered via i-deals, as well as how the arrangements lead to benefits for individuals and organisations. One narrative claims that i-deals are exclusive arrangements used to reward an organisation’s “high performers” (Guerrero et al. 2014, p.323) or “stars” (Bal 2017, p.14). These individuals are suggested to reciprocate for the special treatment they’ve received with positive behaviours, such as discretionary citizenship behaviours (Anand et al. 2010; Guerrero and Chaliol-Jeanblanc 2016). The diverging narrative suggests that i-deals can be more broadly distributed and represent opportunities for a wider range of workers to seek out and receive personalised working arrangements (Rousseau et al. 2006; Hornung et al. 2010; Bal 2017). However, this “broadly distributed” narrative is not clear on how i-deals lead to positive behaviours, given that these arrangements will not constitute preferential treatment.

Consequently, further clarity is needed on two connected issues. First, given that i-deals have been found to be available more widely than to high performers alone (Bal 2017), the basis on which these non-exclusive arrangements are granted is not clear. Neither managerial motivations nor conditions for the authorisation of i-deals are well known, in part due to the prioritisation of the employee perspective by the i-deals literature. The perspectives of the line managers (LMs) who grant i-deals (Hornung et al. 2009) and HR have been comparatively overlooked (Liao et al. 2016). Second, given the presentation within the literature that the positive effects of i-deals derive from employees believing they are receiving special treatment (e.g., Guerrero and Chaliol-Jeanblanc 2016), it is not yet clear how the pathway to positive employee responses might differ for more encompassing i-deals. For example, positive employee outcomes might arise from more broadly distributed i-deals by fulfilling employee needs and encouraging reciprocity (Gouldner 1960; Cropanzano and Mitchell 2005) or by increasing feelings of organisational support (cf. Kurtessis et al. 2017).

To shed light on these issues, this research explores its first two research questions:

- RQ1) What are employers’ motivations for granting i-deals, and under what conditions are they made available to employees?

RQ2) How do employer motivations and conditions for granting i-deals shape employee perceptions and responses (attitudes and behaviours)?

Relatively early in the development of the i-deals literature, Rousseau et al. (2006) suggested that co-workers will make judgements regarding the appropriateness of any i-deals, and that their judgements may differ to that of the recipient and the employer. Ultimately, co-worker acceptance of an employee's i-deal can impact the effectiveness of the arrangement for the organisation (Lai et al. 2009). Consequently, conceptual attention has been paid to the balancing of flexibility in employment terms for the individual and employer, versus fairness as perceived and experienced by co-workers. Yet, empirical investigations of the co-worker perspective on i-deals are lacking relative to those focused on the employee. Plus, the potential for a comprehensive understanding of co-worker perceptions and responses to i-deals has been unnecessarily narrowed by a tendency within the literature to reduce co-workers' distributive justice concerns to that of equity alone. Thus, research is needed that allows for a broader conceptualisation of co-workers' fairness assessments of i-deals, while also more deeply exploring what constitutes a fair i-deal from the perspective of co-workers.

To both broaden and deepen understanding of the co-worker perspective on i-deals, the study explores its third research question:

RQ3) Why and how do co-workers assess i-deals as fair or unfair?

The study explores research questions one, two and three through examining stakeholder experiences of financial and flexibility i-deals. This allows for consideration of how the timing of i-deal negotiation (ex-ante or ex-post) corresponds to stakeholders' experiences of i-deals, as other types of i-deal (e.g., task and developmental) require insider knowledge and tend to require ex-post negotiation (Simosi et al. 2021).

Finally, the abductive nature of the study (see section 4.2) has led to the early data collection highlighting LMs as those in receipt of i-deals, and the potential for these arrangements to influence subordinate attitudes and experiences. The extant literature has focused on LMs as the granters of i-deals (e.g., Hornung et al. 2009) and as the leaders of teams within which i-deals exist (e.g., Liao et al. 2017). As noted above, while greater understanding of LMs as those who grant i-deals is still needed, research has also thus far failed to sufficiently explore the potential for, or impacts of, LMs as the *recipients* of i-deals. Rofcanin et al. (2018) are an exception. They proposed and found support for managers' task and developmental i-deals trickling down to their subordinates, leading them to have similar arrangements. However, as highlighted by Rofcanin et

al. (2018) the varying nature and wide-ranging content of i-deals means the trickle-down effect they observed cannot be presumed for other i-deal dimensions. Given the importance of third-party perceptions to the successful functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), understanding subordinates' experiences of other types of LM i-deal is needed. In particular, the impact of LM flexibility i-deals on subordinate experiences and attitudes warrants exploration. Flexibility i-deals are often highly visible arrangements and can impact on work performance and planning when functional dependence between the relevant parties to the i-deal is high: a factor that Marescaux et al. (2019) found to negatively impact co-worker perceptions of i-deals.

Given the early data collected by this research, which drew attention to the oversight by the existing literature to distinguish and explore flexibility i-deals held by LMs, an additional, emergent research question of the study asks:

RQ4) How do line manager flexibility i-deals shape subordinate experiences and attitudes?

The research adopts a qualitative approach that complements existing quantitative analyses predominant in i-deals research (Liao et al. 2016). A comparative case study design examining two research sites provides the contextual understanding needed to appropriately identify i-deals in line with the defining features from the literature, and differentiate them from standard organisational policy and practice. Collecting data via 57 semi-structured interviews with employees (including LMs) with i-deals, the LMs who grant i-deals, co-workers (including subordinates) and HR representatives, this thesis addresses a deficit in research considering i-deals from multiple stakeholder perspectives (Conway and Coyle-Shapiro 2016; Liao et al. 2016).

### *1.2. Research findings and contributions*

Based on the research findings, this thesis enhances our understanding of i-deals in three overarching ways. First, the findings provide insight into employer motivations and conditions for granting i-deals, and how these correspond to employee responses. The research extends upon existing theorising (e.g., Bal 2017) by identifying two pathways to i-deal outcomes. Market-based i-deals are granted by employers to secure star performers/desirable candidates and are perceived by employees as special treatment that they are entitled to, leading to functional benefits for organisations (e.g., recruitment/retention). Based on the research findings, financial i-deals (negotiated ex-post or ex-ante) and ex-ante flexibility i-deals are aligned to this market-based pathway. In contrast, ex-post flexibility i-deals are found to be supportive in nature. Supportive i-deals are granted to support trusted employees. Perceived by employees as a

reflection of the quality of their employment relationship and leaving them feeling valued, these i-deals lead to broader reciprocation.

Second, the findings enhance understanding of why and how co-workers perceive financial and flexibility i-deals as fair or unfair. The research contributes to existing work focused on co-worker perceptions of i-deals as (un)fair by revealing what co-workers believe constitutes flexibility i-deals as *needed* and financial i-deals as *equitable*. These socially acceptable criteria that co-workers adopt to assess i-deal fairness are discussed as being influenced by the resource on offer via the arrangement, and this research demonstrates the potential for co-workers and employers to perceive the nature of these resources differently. Influences and information that inform co-workers' assessments of flexibility versus financial i-deals (against the relevant socially acceptable fairness criteria) are also highlighted.

Finally, the findings reveal how LM flexibility i-deals can impact upon subordinate experiences and attitudes. Based on the findings, the potential for other LMs and co-workers to be impacted by LM flexibility i-deals is also discussed, as are the challenges faced by LMs with flexibility i-deals. A theoretical model is proposed for the perceived functionality and fairness of LM flexibility i-deals, as well as the implications of these arrangements for individuals and organisations. The research highlights the distinct nature of flexibility i-deals held by LMs and demonstrates the importance for future i-deals research to distinguish between LM and subordinate i-deals.

Practically, the research highlights the broad benefits of supportive flexibility i-deals, encouraging the use of these arrangements as tools for good management practice. Employers are encouraged to make use of cultural levers to promote shared understandings that flexibility i-deals are considered to be needed and fair in the widest of circumstances, encouraging co-worker acceptance of these arrangements. Nonetheless, LMs with flexibility i-deals are encouraged to carefully consider how their arrangements may affect their subordinates, and to proactively plan (with all the relevant stakeholders) how their teams will access support when they are not physically present. In contrast, this thesis highlights the potential limitations of market-based i-deals, that may lead to purely functional outcomes and may not have the anticipated positive impact on attitudes and behaviours. When used in place of a market-based compensation system, financial i-deals risk creating internal inequity and leading to disgruntled reactions from co-workers, reducing the overall effectiveness of the i-deal and undercutting workplace justice (Rousseau et al. 2016).

The research emphasises the importance of examining i-deals from multiple perspectives. Through its approach, the study supports a more nuanced and enriched understanding of i-deal formation and functioning, particularly from the relatively overlooked perspectives of employer representatives (LMs and HR) and co-workers. It also highlights neglected roles (LMs as recipients of i-deals, subordinates as a specific example of co-workers) and new stakeholders (HR, senior managers, other LMs) potentially relevant to the formation and functioning of i-deals that future research should pay closer attention to. Crucially, through the supportive i-deals discussed in Chapter 7, this research contributes to the field by revealing a pathway to positive outcomes not reliant on i-deals being exclusive arrangements reserved for high performers, but that can be broadly distributed. Broadly distributed i-deals are more likely to be accepted by third parties (cf. Rousseau et al. 2016), and may act as the precursors and trials for organisational policy changes that have been discussed since early on in the conception of i-deals (Rousseau 2001; Rousseau et al. 2006). Based on the findings, the research makes recommendations in support of creating i-deals that are perceived as fair by third parties (cf. Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), with additional considerations necessary when the i-deal recipient has line management responsibilities. Finally, the research takes steps in addressing the deficits in research examining the formation and functioning of both ex-ante (as well as ex-post) i-deals and financial i-deals, by exploring multiple stakeholders' attitudes and experiences of these arrangements.

### *1.3. Structure of the thesis*

Chapter 2 reviews the i-deals literature that informs the aims and research questions of this study. I-deals are introduced and defined, and key questions related to their formation and functioning are posed and considered against our knowledge and understanding from the extant literature. These questions include considerations of: who i-deals are available to, how i-deals lead to positive outcomes, how co-workers perceive and respond to i-deals, and what role LMs play in the formation and functioning of i-deals. The chapter highlights that a prioritisation of the employee perspective of i-deals within the empirical research, and the predominantly quantitative approach to examining i-deals to date, has limited our understanding in response to these questions. Consequently, the chapter concludes by presenting the study's four research questions. These questions support the overarching aim of the research to explore multiple relevant stakeholders' attitudes and experiences of the formation and functioning of i-deals.

Chapter 3 outlines the main theories that will support the thesis in answering its research questions. The broad use of multiple theories, rather than the application of a single theoretical

lens, aligns to the multi-stakeholder and abductive approach taken by this research. Social exchange theory which considers exchanges as social versus economic in nature, organisational justice theory concerned with how individuals assess outcomes, processes and interactions as fair, and social resource theory (SRT) focused on the nature of social resources are all presented. The literature that examines LMs as the implementors of devolved HRM is also put forward as beneficial to enhancing understanding of how LM flexibility i-deals influence subordinate experiences and attitudes. The tenets of each of these theoretical lenses are laid out, along with any previous integrations within the i-deals literature, and their potential to enhance understanding in response to any (or all) of the research questions.

Chapter 4 presents the methodological strategy of the research, stressing its alignment and appropriateness for answering the research questions presented in Chapter 2 and the aim of exploring the formation and functioning of i-deals from multiple perspectives. It describes the interpretive phenomenological underpinnings of the research, before moving on to the abductive approach to theory building, the comparative case study design, and the use of semi-structured interviews and thematic analysis as its method for collecting and analysing data. Specific details of the research sites (InsuranceCo and ConstructionCo) and samples are also outlined, and methodological and ethical considerations discussed.

Chapter 5 presents key descriptive findings from the study. Providing context to the more analytical findings presented in the subsequent chapters, these describe the roles that LMs, HR and third parties play in the formation and functioning of financial and flexibility i-deals across both case organisations. Specifically, it describes the involvement of LMs and HR in the granting of each of these different types of i-deal, plus co-worker (including subordinates) and HR (when not involved in granting the arrangement) awareness of them.

Chapter 6 is the first of three empirical chapters (also Chapters 8 and 10) to explicate the findings in response to the study's research questions. Each of these chapters is followed by a discussion chapter (Chapters 7, 9 and 11) that considers how the relevant findings support, challenge or extend existing understanding of i-deals, as well as reflecting upon the limitations of the study, exploring relevant directions for future research and discussing the practical implications of the findings.

In response to research question one, Chapter 6 reveals different employer motivations and conditions for granting i-deals. Plus, it reveals employees' responses to i-deals based on their perceptions of why the arrangement was granted (RQ2). Based on these findings, Chapter 7



presents a model of two distinct i-deal pathways (market-based versus supportive). The different i-deal pathways are discussed as representing economic/transactional versus social/relational exchanges, and past work integrating ideas from organisational justice theory and SRT is considered to enhance understanding of LMs' granting of i-deals. The chapter also considers how the findings extend our understanding of how the content and timing of i-deals influence their formation and functioning.

Chapter 8 presents the findings revealing why and how co-workers judge i-deals as fair or unfair (RQ3). It differentiates between co-workers who may or may not be accepting of i-deals in any circumstances, and (for co-workers who are open to the creation of i-deals) the criteria they use to assess the fairness of flexibility versus financial i-deals. The chapter goes further by revealing the circumstances in which co-workers consider flexibility and financial i-deals to meet their adopted fairness criteria, and details influences and information that inform their assessments. The findings also reveal the influence/lack of influence of the timing of i-deal negotiation on co-worker attitudes to financial/flexibility i-deals. Based on these findings, Chapter 9 proposes models of fair financial and flexibility i-deals. These models outline co-workers' adoption of and assessment against socially acceptable criteria (influenced by the resource offered by the arrangement) for evaluating the fairness of these i-deals. The theoretical discussion that takes place in Chapter 9 draws heavily on organisational justice theory. Throughout, the chapter considers how the research has supported and extended our understanding of co-worker attitudes towards i-deals.

In response to research question four, Chapter 10 focuses on the findings detailing the implications of LM flexibility i-deals for third parties. It presents details of a relationship between LM flexibility i-deals and whether subordinates feel supported to carry out their role, including two mitigating/exacerbating factors. Based on their perceptions of support, subordinates assess their LM's flexibility i-deal as functional or dysfunctional. Plus, the chapter reveals how LM behaviour in response to their own flexibility i-deals can lead to their subordinates experiencing either increased or restricted levels of flexibility. This influences those subordinates' perceptions of whether or not their LM's flexibility i-deal is fair. Chapter 11 then presents a model of third-party perceptions of LM flexibility i-deals focusing on the perceived functionality and distributive fairness of the arrangements, and the implications for role performance (LM and subordinate) and organisational outcomes. The chapter highlights similarities and differences in the outcomes and implications of flexibility i-deals held by employees with and without line management responsibilities. The chapter draws upon the literature focused on the role of the LM as the

implementors of devolved HRM and extends existing theorising by also highlighting LMs as the consumers of HR practice and how this can influence the attitudes and experiences of subordinates.

Finally, the concluding chapter (12) summarises the thesis, before presenting the overarching theoretical and practical implications of this research. The multi-source approach adopted by the study underpins these contributions, having supported the research in enhancing our understanding of i-deal stakeholders' relationships and responses, both of which are key to the formation and functioning of these multi-party arrangements (Rousseau 2005; Rousseau et al. 2006; 2016). An agenda for future research is also discussed.

## 2. Literature review – The formation and functioning of idiosyncratic deals

This chapter reviews the extant i-deals literature, answering key questions relating to the concept, noting inconsistencies within the existing body of research and highlighting gaps in our knowledge in order to identify areas in need of further exploration. Based on this review, the chapter concludes by presenting the aims of the research.

### 2.1. *What are i-deals (and what are they not)?*

I-deals are individualised employment arrangements that employees agree with their employer (Rousseau 2001). Four defining features of i-deals are consistently provided by the literature (Rousseau et al. 2006; Bal and Jansen 2015; Conway and Coyle-Shapiro 2016; Liao et al. 2016). I-deals are 1) bargained for individually, 2) heterogeneous, leading to within-group differences in conditions of employment, 3) intended to benefit both employer and employee, distinguishing them from acts of politics or favouritism, and 4) variable in scope: an employee may have a largely standardised package, except for one or two idiosyncratic elements, or they might have an entirely idiosyncratic arrangement. I-deals are described as an objective difference in treatment rather than the difference in perception (Rousseau 2001), differentiating the concept from the psychological contract (see Rousseau 1995). The emergence of research into i-deals since the early 2000s reflects employers seeking out new strategies for managing their employment relationships. This is underpinned by questioning as to whether the standardisation of employment arrangements always leads to optimal organisational outcomes (Rosen et al. 2013).

### 2.2. *What are the contents of i-deals?*

Research has considered how the content of i-deals impacts their negotiation, distribution and subsequent outcomes. The first study to categorise i-deals by their content was Rousseau and Kim (2006), who identified three dimensions of i-deals. One was work-hour flexibility i-deals, which relate to flexibility around an employee's work schedule and the number of hours they work. They also identified workload i-deals, which feature the negotiation of reduced work demands and work hours, and finally career development i-deals, which relate to personalised development opportunities, career trajectories and/or performance goals. In the years following, studies generally focused on i-deals associated with work-hour flexibility, workload, and aspects of job

content related to career development and job redesign (e.g., Hornung et al. 2008; 2009; Rousseau et al. 2009).

Following their review of the literature focused on identifying the resources commonly included in i-deals, Rosen et al. (2013) proposed four i-deal dimensions. They dropped Rousseau and Kim's (2006) workload dimension, but retained their work-hour flexibility dimension, renaming it "schedule flexibility". Rosen et al. (2013) combined the existing career development dimension with a task dimension identified by Hornung et al. (2010) in order to create a single task and work responsibilities dimension. The authors also included two new dimensions: financial incentives and location flexibility. These had both been identified by previous research (Rousseau 2005; Rousseau et al. 2006), but at the time had received limited empirical investigation. Rosen et al. (2013) justified their decision to combine the career development and task dimensions into a single category (i.e., tasks and work responsibilities) because they claimed that career development and task i-deals both involve the negotiation of what an employee does in their job. Hornung et al. (2010) had previously stated that the main difference between task and developmental i-deals were the reasons *why* an agreement is negotiated. Consequently, Rosen et al. (2013) felt that by focusing on *what* is negotiated (i.e., job content) as opposed to *why* it is negotiated, they could better assess the resources included in i-deals. Further, they justified dropping the workload dimension because they felt it overlapped significantly with schedule flexibility i-deals, as well as job tasks and responsibilities i-deals.

Following the publication of Rosen et al. (2013), location flexibility negotiated via i-deals (e.g., Tang and Hornung 2015; Ostrom et al. 2016; Rousseau et al. 2016; Tuan 2017) and financial i-deals (e.g., Ho and Kong 2015; Marescaux and De Winne 2016; Bal 2017; Marescaux et al. 2019) have both started to receive more attention in the literature, although financial i-deals in particular still remain relatively overlooked in comparison to other i-deal dimensions. Furthermore, the categorisation of i-deals presented by Rosen et al. (2013) has not been widely or fully accepted. A review by Rousseau et al. (2016) distinguished between five different types of i-deal based on their content: developmental, task, flexibility (working hours and location), reduced workload, and financial i-deals. The merging of task i-deals and developmental i-deals by Rosen et al. (2013) into one category has been particularly contested, with numerous studies since examining developmental i-deals as its own dimension (Hornung et al. 2014; Tang and Hornung 2015; Guerrero and Challiol-Jeanblanc 2016; Ho and Tekleab 2016; Vidyarthi et al. 2016; Ng 2017). Gascoigne and Kelliher (2018) are explicit in disputing the merging of these dimensions due to their research highlighting differences between i-deals negotiated in order to address work-life

balance needs and those motivated by career development needs. Gascoigne and Kelliher (2018) also identified examples of both schedule and workload (tasks) being negotiated separately within the same i-deal, which led them to introduce a new form of i-deal: the 'reduced time and workload' i-deal. This finding extends upon the suggestion by Hornung et al. (2009) that 'workload reduction' i-deals are a separate category, but conflicts with the claim by Rosen et al. (2013) that workload reduction i-deals can be subsumed within schedule flexibility i-deals.

The categorisation of i-deals based on their contents is important to consider. This categorisation is frequently relied upon by research considering the outcomes of i-deals: the findings of which have practical implications for organisations and managers using these arrangements. The extent to which the resources offered via i-deals are concrete versus abstract, and particularistic versus universal (see section 3.2), and what this means for i-deal formation and functioning has been considered. For example, Rousseau et al. (2009) suggest that developmental i-deals are more particularistic and abstract because the meaning of development differs between individual employees, and Rousseau et al. (2006) proposed that ex-ante i-deals (see section 2.3) would more likely be based on concrete and universal resources than particularistic and abstract resources.

Because i-deals are so wide ranging in their contents (Conway and Coyle-Shapiro 2016), empirical studies tend to focus on only one or a small number of i-deal types (e.g., Hornung et al. 2008; Guerrero et al. 2016; Guerrero and Challiol-Jeanblanc 2017; Las Heras et al. 2017; Rofcanin et al. 2018) rather than the construct more generally (Anand et al. 2021 are a recent exception). The findings focused on the outcomes of i-deals, most often explored through these examinations of one or a small number of i-deal dimensions (Conway and Coyle-Shapiro 2016), are inconsistent (Liao et al. 2016; Bal 2017). One explanation for these inconsistencies could be a failure to date to understand and consistently categorise different types of idiosyncratic arrangement. Contributing to this failure may be the lack of qualitative and exploratory i-deals research that has resulted in a lack of understanding of how i-deal stakeholders (i.e., i-deal recipients, their managers and third parties) classify i-deals themselves. Gascoigne and Kelliher (2018) have called for contextualised, qualitative research on i-deals in order to distinguish between the content and nature of the arrangements. As such, this research will be guided by the relevant stakeholders' categorisations of i-deals (see section 4.4), in order to access an understanding of different i-deals and their outcomes that is representative of those stakeholders' experiences and interpretations.

### 2.3. *When are i-deals negotiated?*

The literature discusses the timing of i-deals as either ex-ante (negotiated prior to employment commencing) or ex-post (negotiated once on the job) (Rousseau 2001; Rousseau et al. 2006). Additionally, “threat to quit” i-deals have been identified as ex-post arrangements that are agreed to retain certain employees once they threaten to terminate the employment relationship (Rousseau et al. 2016).

The majority of i-deals research explores ex-post arrangements, with only three studies empirically examining ex-ante arrangements (Rousseau et al. 2009; Lee and Hui 2011; Guerrero and Challiol-Jeanblanc 2017). This focus on ex-post i-deals is frequently justified due to more information being available to both the employer and employee (regarding both the other party and the work) during ex-post negotiation. Consequently, ex-post arrangements are considered more reflective of the employee-employer relationship. In contrast, ex-ante i-deals are suggested to be reflective of the labour market and whether that individual’s skills are in high demand but short in supply (Rousseau et al. 2006), rather than the relationship between the employee and employer. Supporting these suggestions, Rousseau et al. (2009) found that ex-ante i-deals have little effect on how the employment relationship develops after recruitment. Guerrero and Challiol-Jeanblanc (2017) also found no direct effects from ex-ante i-deals but did find moderating-type impacts in the short- but not long-term (during the first three years of employment). These included strengthening the negative relationship between the perceived external prestige of the employer and employee turnover intentions.

Two of the (few) differences that have been explored between ex-ante and ex-post i-deals relate to their frequency and content. Due to concerns regarding the consequences of disparities in employment conditions, it was initially proposed by Rousseau et al. (2006) that ex-post i-deals will be more common due to employers being reluctant to grant ex-ante i-deals to all but those deemed the most crucial to recruit. This proposition, that ex-ante negotiation would be less common than ex-post negotiation, was empirically supported by the findings of Rousseau et al. (2009) and Lee and Hui (2011). Turning to the content of these arrangements, both Rousseau et al. (2009) and Lee and Hui (2011) also found that ex-ante i-deals were more economic than social-relational (see section 3.3) in orientation, and ex-post arrangements were more relational than ex-ante deals. However, studies examining ex-ante i-deals and their effects (e.g., Rousseau et al. 2009; Lee and Hui 2011; Guerrero and Challiol-Jeanblanc 2017) have tended to focus on a single stakeholder (the employee) in this multi-stakeholder research context. By seeking to explore multiple stakeholders’ experiences of both ex-post and ex-ante i-deals, this study responds to

calls for more research to examine ex-ante arrangements (Liao et al. 2016), and helps to develop our understanding of differences between ex-ante and ex-post i-deals and their outcomes.

#### 2.4. *Who are i-deals available to?*

Early on in the conceptualisation of i-deals, Rousseau (2005) presented their potential to be used as not only rare exceptions for “superstars” (p.15), but also as arrangements available to “regular people, too” (p.16). However, the literature to date has failed to sufficiently theoretically develop i-deals as arrangements that can be either exclusive or more widely available. Instead, two narratives have largely diverged and been developed separately. Bal (2017) claims that the conceptualisation of i-deals “has primarily developed around the notions of stars or high performers in organisations” (p.14). For example, when exploring the relationship between i-deals and organisational commitment, Guerrero et al. (2014) intentionally focused on high performing employees who they considered to be in a privileged position to negotiate for i-deals. However, other authors (Rousseau 2001; Rousseau et al. 2006; Hornung et al. 2010; Hornung, Glaser and Rousseau 2011) have stated that i-deals are not limited to stars and represent a changing labour market where there are opportunities for a wider range of workers to seek out and receive individualised working arrangements. I-deals that are widely available in this way can remain idiosyncratic by supporting employees in customising their employment for their individual requirements. Such i-deals have the potential to offer individual responsiveness and consistent implementation: a combination found to have stronger associations with job performance than HRM practices that are either only consistent or individually responsive (Fu et al. 2020). Used in this way, i-deals can fulfil employee needs and preferences that existing policies do not address. Plus, these i-deals can act as trials of HR practices that are subsequently rolled out organisation wide (Rousseau 2001; Rousseau et al. 2006).

I-deals being both exclusive and non-exclusive arrangements has been empirically supported. Bal (2017) did find that some employees are motivated to negotiate i-deals because they feel that they have earned it, perceiving themselves as a high performer or somebody with high potential. However, he found that others are motivated by solving or preventing problems they are experiencing related to their work, for example negotiating an individualised working schedule to fit around school hours or to enhance their own motivation and productivity. These findings suggest that i-deal negotiation is not just initiated by employees who consider themselves “stars”.

Yet, in order to understand who is receiving i-deals, it is necessary to not only understand which employees are initiating i-deal negotiation, but why and on what basis i-deals are being granted

by employers. Managers have been encouraged to only authorise i-deal terms that they would be happy to grant to others, and that to maintain perceptions of fairness within their teams they should be open to creating i-deals with many employees (Rousseau et al. 2016). This may make the case for the broadest possible distribution of i-deals appear compelling, but there are strong disincentives and potential barriers to this. Some employees may be nervous about how requesting an i-deal will be perceived (Rousseau et al. 2006). Plus, the negotiation and management of i-deals is time and effort intensive for managers (Rousseau 2005). Managers may also have concerns that i-deals create tensions between consistency and flexibility, and that they will need to manage precedent implications with co-workers (ibid). Consequently, within the narrative that presents i-deals as more encompassing, the basis for employers granting i-deals that are not exclusive and reserved for high performers is not yet clear.

Thus, differing narratives on the availability of i-deals exist within the literature and we do not sufficiently understand why employers grant widely available i-deals. To enhance understanding of why some i-deals are exclusively available versus more widely available, and which employees can obtain these exclusive versus more encompassing i-deals, it is necessary to understand why and to whom employers grant or deny these arrangements. This topic has started to be explored by Hornung et al. (2009) and Laulié et al. (2019) who found that a line manager's (LM's) granting of flexibility i-deals is influenced by the type of work the employee performs and whether the LM has received their own i-deal. Relationship quality between an employee and their LM has also been found to be important, with leader-member exchange being positively related to the successful negotiation of task i-deals, (Hornung et al. 2010; Rosen et al. 2013; Hornung et al. 2014), developmental i-deals (Hornung et al. 2014), and both location flexibility (Rosen et al. 2013) and schedule flexibility i-deals (Rosen et al. 2013; Hornung et al. 2014). Hornung et al. (2009) also revealed some of the anticipated effects LMs expect the i-deals they grant to have, such as flexibility i-deals enhancing employee work-life balance. Plus, Hornung, Rousseau et al. (2011) found that when a LM is considerate, employees are more likely to successfully negotiate developmental and schedule flexibility i-deals. Similarly, Taser et al. (2021) found a positive association between the prosocial motives of LMs and the creation of flexibility i-deals for employees. These studies imply there is a caring, supportive component to LMs' granting of developmental and flexibility i-deals. While these studies have led to important insights, the quantitative approach that has dominated i-deals research to date has prevented a holistic understanding of for whom and why i-deals are being granted by LMs. Just as Bal's (2017) qualitative work has enhanced understanding of why employees negotiate i-deals, a qualitative investigation considering the employer perspective on granting i-deals is needed. Specifically, a



qualitative exploration of why LMs grant i-deals (their motivations for granting), and to whom they grant i-deals (their conditions for granting) would enable a better understanding of who i-deals are available to.

### 2.5. *What outcomes are associated with i-deals?*

A great deal of focus within the i-deals literature has been concentrated on the outcomes of i-deals for organisations and individuals. However, i-deals are not universal in their effects and these relationships have usually been explored in relation to the disputed categories of i-deals discussed above (in relation to their contents, see section 2.2). For example, flexibility i-deals have been found to be related to numerous positive outcomes such as organisational citizenship behaviour (Anand et al. 2010), job satisfaction (Rosen et al. 2013), and affective commitment (Liu et al. 2013). Vidyarthi et al. (2014) suggested i-deals accommodating low and high (but not moderate) levels of flexibility were associated with high levels of perceived organisational support (POS) and career satisfaction. Flexibility i-deals have also been found to be negatively related to work-family conflict (Hornung et al. 2008) and strain (Hornung et al. 2014). Although the research is more limited, the empirical evidence on reduced workload i-deals suggests these arrangements have similar outcomes to flexibility i-deals (Liao et al. 2016). Numerous positive outcomes from developmental i-deals have also been suggested based on positive associations with outcomes including affective commitment (Hornung et al. 2008), work engagement (Hornung, Rousseau et al. 2011) and motivation to work beyond retirement age (Bal et al. 2012). Employees with task i-deals tend to be committed to their organisation (Rosen et al. 2013) and report higher overall justice perceptions (Liao et al. 2016) and lower turnover intentions (Rosen et al. 2013; Hornung et al. 2014). Task i-deals increase job control and complexity, and decrease job stress, leading to increased employee initiative and work engagement (Hornung et al. 2010).

Despite the proportion of i-deals research that has concentrated on the outcomes of i-deals, the findings tend to be inconsistent (Liao et al. 2016; Bal 2017). Plus, the majority of studies have presumed positive outcomes. Only a small number of papers have considered the negative consequences of i-deal negotiation. For example, Hornung et al. (2008) found developmental i-deals to be positively related to work-family conflict. The outcomes of financial i-deals for organisations and individuals also remain comparatively overlooked in comparison to other categories of i-deals. However, Rosen et al. (2013) did identify a relationship between financial i-deals and continuance commitment, which itself has been associated with unfavourable employer- (e.g., reduced job performance) and employee-relevant outcomes (e.g., stress and work-family conflict) (Meyer et al. 2002). Rousseau et al. (2016) suggested the use of financial i-

deals in place of a market-based compensation scheme can undercut workplace justice and reduce co-operation among employees (see section 2.7 for further discussion of co-worker responses to i-deals). Rousseau (2005) proposed that individuals with flexibility i-deals can become marginalised due to their non-conformity and perceptions that they make lower contributions, but empirical investigations are lacking. The relatively little consideration of the downsides of flexibility i-deals, in comparison to the research focused on positive outcomes, is surprising given previous work highlighting the risk of work-family spillover from flexible working arrangements (Perrigino et al. 2018). Employees who work flexibly have been found to work longer hours (Baruch and Nicholson 1997; Golden 2001), and spillover can lead to feelings of guilt (Williams et al. 2013), anger (Butts et al. 2015), reduced commitment, and ultimately increase intentions to turnover (Ferguson et al. 2016).

Hornung et al. (2010) extended considerations of the outcomes of i-deal negotiation by investigating the effects of denied i-deals and found that rejected requests for task i-deals were associated with a more negative assessment of work characteristics. However, like the downsides of i-deals, the consequences of denied i-deal requests remain largely overlooked by the extant literature. Exploratory research that is better suited to unearthing unanticipated effects of i-deals and denied i-deal requests, will enable a better understanding of any negative consequences that may occur.

#### *2.6. How do i-deals lead to positive outcomes and behaviours?*

The theoretical mechanism(s) linking i-deals to outcomes is unclear (Conway and Coyle-Shapiro 2016). Some of the existing explanations for how i-deals lead to positive employee behaviours are premised on i-deals being exclusive arrangements. For example, Rousseau et al. (2006) suggest that being able to negotiate an i-deal is an indicator of how much power an employee wields and demonstrates to them that they are “worthy of special treatment” (p.979). It has been claimed that the positive attitudes and behaviours displayed by i-deal recipients stem from receiving this special treatment in comparison to their peers (Guerrero and Challiol-Jeanblanc 2016). Frank and Cook (1995) note that, at times, such special treatment is disproportionate to actual differences in performance - reflecting the enhanced leverage afforded to those at the top. Yet, as discussed above (see section 2.4), it has also been suggested that i-deals are not always exclusive arrangements accessible only by high performers, but can be more widely available.

The i-deals literature is not clear as to whether the benefits of more encompassing i-deals are similar to exclusive i-deals. Nor does it present a pathway via which widely available i-deals lead

to positive employee attitudes and behaviours, given that they will not constitute preferential treatment. Most of the research into i-deals adopts social exchange theory (see section 3.3) as its theoretical foundation (Liu et al. 2013; Rosen et al. 2013; Conway and Coyle-Shapiro 2016). It is suggested that when employers grant i-deals, employees feel obligated to reciprocate (Anand et al. 2010; Ng and Feldman 2012; Liu et al. 2013). However, as just outlined, it has also suggested that i-deals signal to employees that they are worthy of special treatment. Conway and Coyle-Shapiro (2016) highlight that these positions do not necessarily align. If an employee believes their i-deal reflects past contributions and constitutes special treatment, will they truly feel obligated to reciprocate or might they feel entitled to the negotiated terms? Plus, as established in section 2.4, some i-deals are more widely available and are unlikely to constitute special treatment, however the theoretical mechanisms connecting these i-deals to outcomes are underdeveloped. Thus, it is necessary to question whether the tenets of social exchange theory are more or less relevant to widely available i-deals than those available on an exclusive basis. Furthermore, Conway and Coyle-Shapiro (2016) highlight that the way in which individuals reciprocate during social exchanges is unspecified. Thus, even if granting i-deals leads to a positive response from the employee, the employer cannot be certain when or in what form this positive response will come.

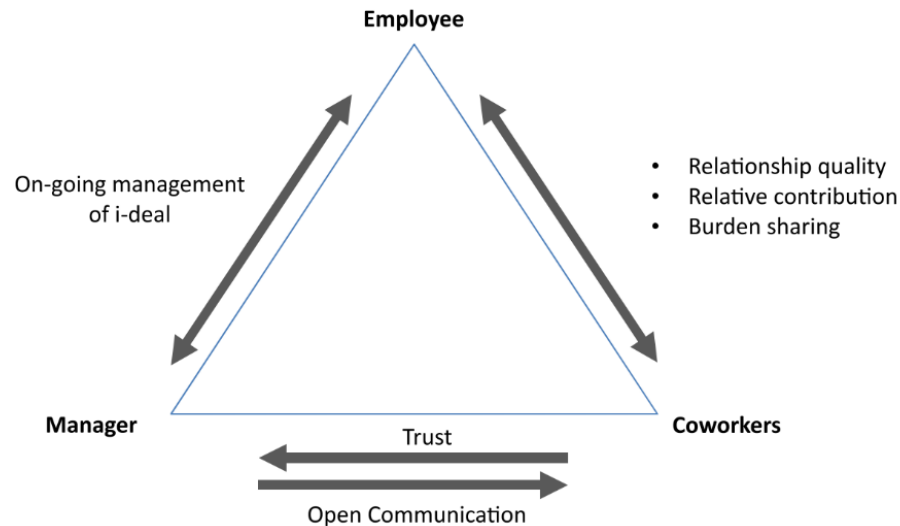
The timing and content of i-deals has been considered to impact the degree to which the arrangements are social/relational versus economic/transactional in nature. As previously highlighted in section 2.3, Rousseau et al. (2009) and Lee and Hui (2011) found that ex-ante i-deals were more economic than social-relational in orientation, and ex-post arrangements more relational than ex-ante deals. Developmental i-deals have been suggested to reflect employment relationships perceived as social-exchanges (Rousseau et al. 2009; Lee and Hui 2011; Liao et al. 2016), whereas workload reduction and flexibility i-deals have been linked to transactional relationships (Lee and Hui 2011). Given the differences in the extent to which individual i-deal dimensions reflect social exchanges, more understanding is needed on what theoretical mechanisms link i-deals to their outcomes.

It has also been suggested that the motivation for an employee negotiating an i-deal (for growth, versus for accommodations from their employer) may influence the outcomes of the arrangement (Bal and Vossaert 2019). In contrast, the impact of employer motivations and conditions for granting i-deals (which may differ between exclusive and widely available i-deals) on outcomes has been overlooked. Employee understanding of why their i-deal has been granted may influence their attitudes and behaviour following i-deal negotiation. For example, broadly

distributed i-deals may lead to positive employee outcomes by meeting employee needs and encouraging acts of reciprocation (cf. Gouldner 1960; Cropanzano and Mitchell 2005) or lead to feelings of organisational support (cf. Kurtessis et al. 2017). Research considering how i-deals lead to positive outcomes, achieved by exploring employee understanding of why their arrangement was granted and their subsequent attitudes and behaviours, is needed for a more comprehensive understanding of how i-deals function and lead to benefits for organisations.

### *2.7. How do co-workers perceive and respond to i-deals?*

As highlighted by Rousseau et al. (2016) in their illustration of the relational factors relevant to the formation and functioning of i-deals (see Figure 2.1.), i-deals are multi-party arrangements. Co-workers have been identified as interested third parties to i-deals, with their acceptance of an i-deal key to its success (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016). Rousseau et al. (2006) also suggest that co-worker judgements of the appropriateness of an i-deal may differ to that of the recipient (employee) and the employer. The authors put forward that these differences will often result from co-workers having incomplete information and not being fully aware of the details of an i-deal. In particular, i-deals created in secret have been highlighted as being likely to be viewed by co-workers as unfair, as this raises suspicion and paranoia that there is something to hide (Rousseau et al. 2006; 2016). Similarly, Conway and Coyle-Shapiro (2016) suggest co-workers may react negatively when they sense an i-deal has been negotiated but do not know the specific terms. To encourage perceptions of fairness and mitigate against these potential negative consequences of i-deals, Greenberg et al. (2004) stressed the importance of sharing information about these arrangements with co-workers (albeit tactfully to avoid perceptions of bragging).



**Figure 2.1. The relevant and interested parties to the formation and functioning of successful i-deals (Rousseau et al. 2016, p.192).**

Although empirical examinations of the co-worker perspective are lacking relative to work exploring the employee's, numerous potential influences on co-worker attitudes and responses to i-deals have been put forward and discussed conceptually within the literature. Marescaux et al. (2021) presented a conceptual model of co-worker reactions to i-deals based on understanding from social comparison theory (see section 3.1.a). They also put forward that co-worker reactions may be dependent on whether they are prosocial and more co-operative and caring towards others, or proself and guided by self-interest (Murphy et al. 2011). Rousseau et al. (2006) stated that the timing of negotiation may impact co-worker perceptions of whether the creation of an i-deal is legitimate. For example, they proposed co-workers may be more accepting of i-deals created in response to market-factors when they are negotiated ex-ante versus ex-post. They also suggested that co-workers are least likely to accept "threat-to-quit" i-deals, which can lead to feelings of resentment. Rousseau et al. (2016) put forward that co-workers who trust their manager will be inclined to view the i-deals that their manager makes as justified and reasonable. The influence of a co-worker's relationships with the employee and employer on their attitudes towards an i-deal have also been empirically tested. Lai et al. (2009) found that co-workers were more likely to accept i-deals on the part of close personal friends than they were for those with whom they had no close relationship, as were co-workers who viewed their employment as a social exchange rather than an economic exchange.

The i-deals literature has also explicated co-workers as the potential recipients of i-deals (in the past, present or future), and considered how this impacts their perceptions and responses to the arrangements. For example, Rousseau et al. (2006) suggest that co-workers may react positively

to i-deals if they see these as an indicator that they may be able to access their own personalised arrangements in the future. This claim has subsequently been empirically supported by Lai et al. (2009), and similar conclusions were drawn by Collins et al. (2013) when they determined that co-workers perceive colleagues' flexibility i-deals as fair as long as they achieve their own personal levels of temporal flexibility.

Rousseau et al. (2006, p.988) suggested "a person receiving an i-deal can engender a more positive response from colleagues by taking steps to minimise any adverse impact." This reflects understanding that third-party assessments of i-deals are affected by the extent to which colleagues of the i-deal recipient gain or lose as a result of the arrangement (Rousseau et al. 2006). The authors propose that i-deals resulting in benefits for co-workers are more likely to be accepted as fair than those that result in no such benefits, and that co-workers will perceive an i-deal as less fair when it results in costs to themselves, as opposed to when the i-deal is cost neutral. One way that co-workers may lose out from i-deals is if the arrangement acts as a barrier to them carrying out their role. Marescaux et al. (2019) found that when functional dependence is high between a co-worker and an i-deal recipient, the co-worker views the arrangement less favourably due to the detrimental impact on work planning and performance. Similarly, Vidyarthi et al. (2016) found that when task-interdependence between team members was high, i-deals were viewed as less valuable by those team members.

The likelihood that co-workers perceive that they gain or lose as a result of an i-deal is also dependent on the content of the arrangement. Rousseau et al. (2006) proposed that the extent to which the arrangement uses finite resources (e.g., money) is influential. Marescaux and De Winne's (2016) empirical examination of co-worker reactions to financial versus flexibility i-deals uncovered the use of different distributive justice allocation criteria (see section 3.1.a) when assessing the fairness of these arrangements. They found co-workers are predominantly concerned with an employee's *need* for a flexibility i-deal, but for financial i-deals their concern is whether the arrangements are *equitable* and reward exceptional performance or effort. That is not to say, however, that all co-workers will agree in their fairness assessments of i-deals. Marescaux and De Winne (2016) also found gender differences in their use of distributive justice allocation principles, with women being more concerned with need when assessing the fairness of i-deals. Plus, even if all co-workers are equally concerned with the equity of a financial i-deal, Garg and Fulmer (2017) emphasise that co-workers may all judge performance differently, with some considering task performance and others discretionary performance.

Marescaux and De Winne's (2016) work is alone in empirically exploring co-workers' use of different distributive justice allocation principles when assessing i-deals. Despite other work considering co-workers' assessments of the distributive justice of i-deals (e.g., Greenberg et al. 2004; Lai et al. 2009; Marescaux et al. 2019), most have focused on considerations of equity alone. Garg and Fulmer (2017) suggested the numerous studies considering co-worker assessments of i-deals through the lens of organisational justice may have led to the limited number of outcomes associated with co-worker reactions to i-deals. However, the potential for a comprehensive understanding of co-worker perceptions and responses to i-deals has been unnecessarily narrowed by the reduction of distributive justice to concerns of equity exclusively. Given recent suggestions that employers should focus on ensuring the fairness of i-deals to achieve optimal outcomes (Marescaux et al. 2021), considerations of organisational justice clearly remain key to understanding how i-deals can successfully function in organisations. Research is needed that considers co-worker assessments of i-deals as fair or unfair more broadly, while also more deeply exploring why and how co-workers form their judgements. For example, if co-workers are concerned with an employee's need for a flexibility i-deal, as determined by Marescaux and De Winne (2016), what constitutes needing a flexibility i-deal? Plus, what process is undertaken by co-workers in order to make their assessment? The more flexible research approach accommodated by exploratory, qualitative methods would allow for the emergence of a broader and deeper conceptualisation of co-workers' fairness assessments of i-deals.

### *2.8. What role do line managers play in the formation and functioning of i-deals?*

The prioritisation of the employee perspective by the i-deals literature to date has also led to the employer perspective being comparatively overlooked (Liao et al. 2016). LMs typically take on the role of the employer representative who grants (or denies) i-deals and negotiates with employees (Hornung et al. 2009). While numerous studies have collected data from LMs, for example to capture employee performance or behaviours (e.g., Anand et al. 2010; Ng and Lucianetti 2016; Vidyarthi et al. 2016; Las Heras et al. 2017; Liao et al. 2017), few have considered LM's own attitudes and experiences of i-deal formation and functioning. As already described above (see section 2.4), Hornung et al. (2009) and Laulié et al. (2019) are two notable exceptions who identify influences that act on LMs granting of i-deals. However, our understanding of the managerial perspective of i-deals remains limited and has been impeded by the predominantly quantitative approach that has been taken to investigating this topic thus far. Furthermore, despite the frequent claim that HR representatives may be involved in negotiating i-deals, no

research has explored the phenomenon from their perspective (Liao et al. 2016). It is therefore not known to what extent HR are involved in the negotiation of i-deals.

This review has already called for a qualitative exploration of the employer perspective of i-deals, particularly focused on their motivations for granting i-deals and the conditions under which they will do so. Such an approach would allow a more nuanced understanding of LM experiences of and attitudes towards i-deals, and should include data collection from HR representatives to gain insight into their role in the formation of i-deals. Exploratory research of this nature can also help to advance understanding of the process of negotiating an i-deal, a topic recently considered by Simosi et al. (2021). Employer motivations will influence their bargaining behaviour, including their adoption of distributive versus integrative strategies (see Weingart et al. 2007).

Further, the extant i-deal literature that has afforded some attention to LMs has focused on their role as those who grant i-deals (e.g., Hornung et al. 2009) and lead teams within which i-deals exist (e.g., Liao et al. 2017). With only a single exception (see below) the research has not specifically set out to explore the impacts of LMs as those in receipt of i-deals. This oversight is surprising given that empirical work exploring i-deals has tended to focus on those individuals who, as a result of having more control over their working hours, location and effort (De Menezes and Kelliher 2017), are considered most likely to negotiate and receive i-deals (Ng and Feldman 2015). This is a category of workers relevant to LMs. Plus, Laulié et al. (2019) found that the granting of flexibility i-deals is influenced by whether the LM has received an i-deal themselves. The single exception to have explored LM i-deals is Rofcanin et al. (2018). They found trickle-down effects from LM's task and developmental i-deals to their subordinates, and suggest these arrangements signal to their reports that negotiating for i-deals of this nature is acceptable and in accordance with organisational norms and expectations. The authors put forward that managers in receipt of task and developmental i-deals understand and appreciate the needs of their subordinates for similar arrangements. Rofcanin et al. (2018) highlight that their study is the first to focus on manager i-deals, thus they have taken a crucial step in addressing our limited understanding of i-deals held by those with people management responsibilities. However, as highlighted by the authors themselves, the varying nature and wide-ranging content of i-deals means the trickle-down effects identified by Rofcanin et al. (2018) cannot be presumed to apply to other types of i-deal. Given the potential for LMs to successfully negotiate i-deals (Ng and Feldman 2015) and the importance of third-party perceptions to the successful functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), understanding subordinate experiences of other types of LM i-deal is needed. In particular, the impact of LM flexibility i-deals



on subordinate experiences and attitudes warrants exploration. Flexibility i-deals are often highly visible i-deals and, as discussed above (see section 2.7) can impact on work performance and planning when functional dependence between relevant parties to the i-deal is high (Marescaux et al. 2019). Research focused on third-party experiences of LM flexibility i-deals will enable understanding of how these arrangements may be distinct in their effects in comparison to flexibility i-deals held by employees without line management responsibilities.

### *2.9. Review of methodological approaches in i-deals research*

As already highlighted, the vast majority of empirical research investigating i-deals has adopted quantitative research methods. Despite calls for more than a decade for future studies to collect qualitative data to enrich our understanding of i-deals (Hornung et al. 2009; Hornung, Glaser and Rousseau 2011; Liao et al. 2016), quantitative examinations have dominated the literature since i-deals were first introduced by Rousseau in 2001, and only a small handful of studies have relied upon qualitative methods (e.g., Collins et al. 2013; Bal 2017; Gascoigne and Kelliher 2018). This lack of variety in the approach to researching i-deals is particularly confounding given that the few studies to adopt qualitative methods have led to important insights regarding, for example, why individuals negotiate i-deals (e.g., Bal 2017). They have also helped to highlight and address inconsistencies within the existing literature, especially with relation to both the categorisation of i-deals based on their content and the outcomes of i-deals (see Bal 2017; De Menezes and Kelliher 2017).

Another concern is that there is inconsistency in the way that i-deals are measured quantitatively (Conway and Coyle-Shapiro 2016). A qualitative approach can allow for interrogation of the arrangements described by respondents, in order to validate that they meet the criteria of an i-deal (as conceptualised by this study, see section 4.4 for details). Adopting a qualitative approach will therefore not only address the study's research questions (listed in section 2.10), but also provide valuable insight to help future quantitative research in operationalising the defining features of i-deals.

Further, to truly understand the formation and functioning of i-deals, research needs to capture employee, employer and relevant third-party perceptions and experiences. Recent work from Anand et al. (2021) collected data from multiple i-deal stakeholders with important implications for understanding the creation and effects of i-deals in the group contexts within which they exist. By considering employee, co-worker and managerial perspectives, they found evidence that co-workers' perceptions of fairness can motivate or discourage employees to negotiate i-deals, and

that i-deals can impact outcomes (e.g., performance) for whole workgroups, not just the i-deal recipient. The role of co-workers in the creation of i-deals was also demonstrated by the multi-stakeholder research undertaken by Rofcanin et al. (2020). Collecting data from employees, co-workers and managers, they found evidence of a positive association between support from co-workers and employee obtainment of task i-deals. However, i-deal studies to date have predominantly neglected to collect multi-source data (Conway and Coyle-Shapiro 2016; Liao et al. 2016). Only by collecting data from all relevant parties to i-deals can the full consequences of these arrangements truly be understood, and can it be determined whether all the varying forms of i-deal are truly beneficial to individuals and organisations.

Considered together, and as has been suggested throughout this review, there is a need for qualitative research exploring multiple stakeholders' attitudes and experiences of i-deals to build on existing insights. Research designs of this nature will support a deeper and more holistic understanding of i-deals and better address many of the unanswered questions regarding i-deals that remain (Bal and Rousseau 2016).

#### *2.10. I-deals research summary: research questions to be explored*

Based on a review of the existing i-deals literature, numerous questions related to the formation and functioning of i-deals have been highlighted as needing further investigation. Questions remain over why and to whom i-deals are granted by employers, as well as how i-deals that are exclusively available versus more widely available lead to positive outcomes for employees. By exploring these questions, this research can also advance our understanding of why i-deal requests may be denied, as well as the differences between ex-ante and ex-post arrangements. It will also support a greater comprehension of the varying outcomes of i-deals that offer different content, which to date is inconsistent (Bal 2017) and certain types of arrangement (e.g., financial i-deals) have been overlooked (Liao et al. 2016). This research will seek to both broaden and deepen our understanding of co-worker perceptions of i-deals as fair or unfair: a topic that thus far has been (mostly) reduced to considerations of equity alone and has received comparatively little empirical attention. Finally, experiences of and attitudes towards i-deals held by line managers will be explored.

Specifically, these topics will be examined through exploration of the following four research questions:

- RQ1) What are employers' motivations for granting i-deals, and under what conditions are they made available to employees?

RQ2) How do employer motivations and conditions for granting i-deals shape employee perceptions and responses (attitudes and behaviours)?

RQ3) Why and how do co-workers assess i-deals as fair or unfair?

RQ4) How do line manager flexibility i-deals shape subordinate experiences and attitudes?

Research questions one to three will specifically be explored through examining stakeholder experiences of attitudes towards flexibility and financial i-deals (see section 4.6.b for more details). A focus on flexibility and financial i-deals allows for the consideration of the role of timing in stakeholders' experiences of i-deals, as these are arrangements that are negotiable ex-ante or ex-post. In contrast, other types of i-deal, such as task and developmental i-deals require insider knowledge and tend to be negotiated ex-post (Simosi et al. 2021). Research question four will specifically examine experiences of LM flexibility i-deals. Flexibility i-deals are most often visible to others and can have the most visible impact on others. Thus, the influence of these arrangements on subordinate experiences warrants exploration. Plus, whereas LM's task and developmental i-deals have been considered by Rofcanin et al. (2018), LM flexibility i-deals have been overlooked.

Methodologically, this can best be achieved through exploratory, qualitative research exploring multiple stakeholders' experiences of i-deals. These stakeholders are: the employee (i-deal recipients with and without line management responsibilities), employer representatives (predominantly LMs but also HR representatives) and co-workers (including subordinates). A comprehensive outline of the methodological strategy adopted by this research will be outlined in Chapter 4, but first in Chapter 3, the main theoretical approaches that will support the study's exploration of its research questions will be reviewed.

### 3. Theoretical approaches to exploring multiple stakeholders' experiences of i-deals

Having established the study's overall aim and research questions (see section 2.10), this chapter focuses on the main theoretical approaches that help inform this research in exploring multiple stakeholders' experiences of i-deals. The main tenets of organisational justice theory, social resource theory, social exchange theory, and the literature focused on the role of line managers (LMs) are outlined. The potential understanding and value gained from the application of these theories to examining experiences of i-deals is considered, and any past integrations with the i-deals literature are highlighted. Due to the examination of numerous perspectives, the broad application of multiple relevant theoretical approaches is preferable and adds value over and above a single theoretical lens for the study.

#### 3.1. *Organisational justice theory*

Within organisations, questions of justice are focused on why and how people decide what is fair or just, and the consequences that follow these judgements (Cropanzano et al. 2007). Through these investigations, three (or four) dimensions of justice have been identified and developed: distributive, procedural and interactional (which many have subdivided into informational and interpersonal).

##### 3.1.a. *Distributive justice*

The initial considerations of organisational justice focused on how employees evaluate and react to the allocation of resources within organisations (Rupp et al. 2017). These perceptions of the fairness of *outcomes* within organisations are the focus of what is termed distributive justice (Adams 1965; Leventhal 1976). The development of distributive justice reflects the reality that not all workers receive the same treatment or resources, prompting concern as to whether or not what they (and others) receive is fair (Cropanzano et al. 2007).

Early considerations of distributive justice built on the tenets of social comparison theory (Rupp et al. 2017). Social comparison theory is itself an explanatory framework based on employee perceptions of fairness. It claims that employees compare outcomes they receive with the outcomes received by others, and form judgements as to whether any differences observed are fair or justified (Festinger 1954). Thus, early ideas of organisational justice considered that overall outcome levels may not be as important to individuals as relative favourability (Rupp et al. 2017).

The ideas from social comparison theory were built upon by Adams (1965). He claimed that individuals are not concerned about the absolute level of outcomes, but whether those outcomes are fair, as indicated by their perceptions of balance between their inputs and their outputs (Colquitt et al. 2001). In other words, individuals expect outcomes or rewards (e.g., pay, recognition) that reflect and are in proportion to the effort or investment (e.g., education, experience) they put in (Rupp et al. 2017). Adams (1965) suggested that employees give meaning to their own input-output ratio by comparing it to that of comparable others (Colquitt et al. 2001). Based on these principles, Adams (1965) developed equity theory. Equity theory states that an employee perceives unfairness (or inequity) when their own input-outcome ratio suggests they are relatively disadvantaged or advantaged, when compared to somebody they perceive as a comparable other (Colquitt et al. 2001; Rupp et al. 2017). Furthermore, equity theory suggests that when inequity is discovered, employees engage in actions to restore equity such as increasing or decreasing effort (Colquitt et al. 2001; Rupp et al. 2017).

The work of Deutsch (1975) had significant influence on the theoretical development of distributive justice. His theory of distribution principles describes the rules used by those who allocate resources (Rupp et al. 2017). These rules for distribution include equity - consistent with Adams (1965) - but also add two more principles: equality (outcomes are allocated equally across all receivers) and need (outcomes are allocated according to the receivers' requirements or sense of urgency). These principles of equity, equality and need are generally considered the three distributive justice allocation rules that indicate the appropriateness of outcomes (Cropanzano et al. 2007).

The implications of (un)fair outcomes in organisations are consequential. Distributive justice perceptions have been linked to numerous employee attitudes, including job satisfaction (McFarlin and Sweeney 1992; Haar and Spell 2009), turnover intentions (Haar and Spell 2009), and affective commitment (Murphy et al. 2006), as well as organisational outcomes such as actual turnover (Jones and Skarlicki 2003; Brashear et al. 2005). However, more recent reflections on contemporary organisational justice research note that there is little consideration of social comparison processes in distributive justice studies, despite it being so foundational to both equity theory and the subsequent approaches that have grown out of equity theory (Rupp et al. 2017). Furthermore, Rupp et al. (2017) highlight that current research tends to treat outcomes as fair when they have been distributed equitably and overlook the other allocation principles relevant to distributive justice: equality and need. Current distributive justice studies may have therefore inadvertently narrowed the concept. Plus, additional influences on distributive justice

perceptions, such as self-interest (Lerner and Clayton 2011) and identification with the individuals receiving outcomes (Brockner and Greenberg 1990), have been proposed but have received relatively little attention in comparison to need, equality and - in particular - equity. Future research may benefit from considering a wider interpretation of distributive justice in order to get a more holistic understanding of how individuals form judgements regarding organisational outcomes. This broader approach to considering organisational justice is taken by this study.

### *3.1.b. Procedural justice*

Rather than the fairness of outcomes, procedural justice refers to the fairness of the procedures underlying organisational decisions (Thibaut and Walker 1975). Thibaut and Walker's (1975; 1978) "Theory of Procedure" mainly developed from their interest in dispute resolution and attempts to understand how an individual's desire for perceived fairness can be satisfied when a decision is being made by a third party (Colquitt et al. 2001; Rupp et al. 2017). They also worked to understand whether procedural justice perceptions could moderate the negative effects of receiving unfavourable outcomes - later termed the "fair process effect" (Colquitt et al. 2001; Cropanzano et al. 2007; Rupp et al. 2017). The development of procedural justice as a concept was also aided by Leventhal's (1980) "Justice Judgment Model", which presented six criteria for determining whether a process is perceived to be fair. These were:

- representation of all concerned: ensuring that the interests and opinions of all affected parties are taken into account;
- consistency: the process is applied equivalently across all persons and time;
- a lack of bias: there is a constraint on any influence due to a decision-maker's personal vested interests, and no person or group is singled out for discrimination or ill-treatment;
- accuracy: the most accurate available information is used as the basis for decisions;
- correctability: there is a mechanism to adjust or correct any poor or inaccurate decisions; and
- ethicality: decisions are made based on professional conduct and personal or dominant societal standards of morality.

Leventhal suggested that these criteria may vary in importance at different stages of decision-making processes and that they may not be equally relevant to procedural justice judgements in all contexts (Rupp et al. 2017). Importantly however, Leventhal (1980) also noted that these criteria were speculative, as there was no research available at the time to support either these determinants or the construct of procedural justice more generally.

There is dispute within the organisational justice literature as to whether procedural justice is distinct from distributive justice (e.g., Wayne et al. 2002). Whereas Thibault and Walker considered distributive and procedural justice to be independent forces (Rupp et al. 2017), Leventhal described procedural justice as a minor influence: secondary and an antecedent of distributive justice (ibid). Viswesvaran and Ones' (2002) meta-analytic review of the relevant research supports the suggestion that the outcomes of procedural and distributive justice are distinct, suggesting current thoughts towards the construct align more closely to the claims of Thibault and Walker, rather than those of Leventhal.

### *3.1.c. Interactional justice*

Interactional justice, introduced by Bies and Moag (1986), is the most recent form of justice to emerge in the literature and refers to the fairness of one person's treatment of another. Interactional justice examines the manner in which information is shared between people and how this contributes to perceptions of fairness. It considers whether the justification and explanation for an outcome is acceptable (Rupp et al. 2017), taking into account whether a sufficient amount of information regarding the decision was provided, and/or how it was provided (ibid).

The theoretical development of this third justice dimension has led to attempts to identify rules or criteria that determine perceptions of interactional justice. Bies and Moag (1986) initially proposed that these criteria were: truthfulness, justification, respect and propriety. These criteria have subsequently been separated into those relating to the information shared during relevant interactions, and those relating to the sensitivity of these interactions (Greenberg 1993): a distinction which has been empirically supported (Rupp et al. 2017). Subsequent to this, interactional justice has come to be seen as consisting of two subtypes of justice (Colquitt et al. 2001): informational justice and interpersonal justice. Informational justice focuses on the explanations provided to people that explain, for example, either the procedures that were used to make an outcome or why the outcomes were distributed in a certain way (Colquitt et al. 2001). Interpersonal justice specifically relates to the extent to which those are treated with politeness, dignity and respect by the authorities making or communicating decisions (ibid).

Because interactional justice occurs most often within one-on-one interactions, within organisations it is a form of justice that employees often seek from their LMs (Cropanzano et al. 2007). However, considerations of interactional justice also move justice theory beyond purely formal exchanges with authority figures. Interactional justice relates to everyday encounters,

allowing justice research to consider other interactions including those between co-workers (Cropanzano et al. 2011). It has been claimed that it is this element of interactional justice that differentiates it from distributive and procedural justice (Rupp et al. 2017), as it is often presumed to be individuals in positions of authority who make decisions (relating to outcomes) and control the processes in organisational contexts. A body of work has concentrated on determining whether distributive, procedural and interactional justice are actually distinct from each other, or whether they are substitutable (ibid). As with procedural justice, questions have also been raised as to whether interactional justice merely contributes to perceptions of distributive justice, rather than being a justice dimension of equal concern to workers (Rupp et al. 2017). Whereas the theoretical development of interactional justice suggest that it plays a role and provides explanations distinct from the other justice dimensions, the empirical support is mixed. Some studies have found that procedural and interactional justice may perform the same function, or at least lead to the same outcomes (e.g., Skarlicki and Folger 1997; Barclay et al. 2005). Others provide support for distinct effects from interactional and procedural and/or distributive justice (e.g., O'Reilly et al. 2016). However, the construct of interactional justice has not received as much attention in its own right compared to the research specifically exploring distributive and procedural justice (Rupp et al. 2017).

Overall, the conceptualisation of organisational justice as consisting of distributive, procedural and interactional justice dimensions dominates the extant literature. However, Rupp et al. (2017) highlight that there is some empirical evidence that challenges this approach to understanding organisational justice perceptions and suggests that fairness judgements are based on whatever information individuals have available to them (e.g., Kouchaki et al. 2015), rather than exclusively distributive, procedural or interactional considerations. Such examples demonstrate that these three justice dimensions should not be treated as the only indicators of organisational justice perceptions. Instead, future research should be open to considering a wider range of sources from which employees gather and respond to justice related information within organisations.

#### *3.1.d. Organisational justice theory and i-deals*

The principles of organisational justice are clearly relevant to exploring multiple stakeholders' experiences of financial and flexibility i-deals. As highlighted in section 2.7, existing work has applied organisational justice theory as a lens through which to examine co-worker attitudes and experiences of i-deals (e.g., Greenberg et al. 2004; Lai et al. 2009; Marescaux et al. 2019). Finding the balance between offering personalisation and flexibility to individual employees, versus maintaining fairness for third parties has been a significant theme within the literature since i-



deals were first introduced by Rousseau (see Rousseau 2001; 2005; Rousseau et al. 2006; 2016). Understanding why and how third parties (for this study, co-workers including subordinates) perceive i-deals as fair or unfair is key to the successful functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), and clearly aligns to the goals of organisational justice theory. Plus, the concept of organisational justice can support our understanding of the employer perspective on i-deals, particularly their consideration of i-deal requests, and why they grant or deny i-deals to specific employees or in specific circumstances.

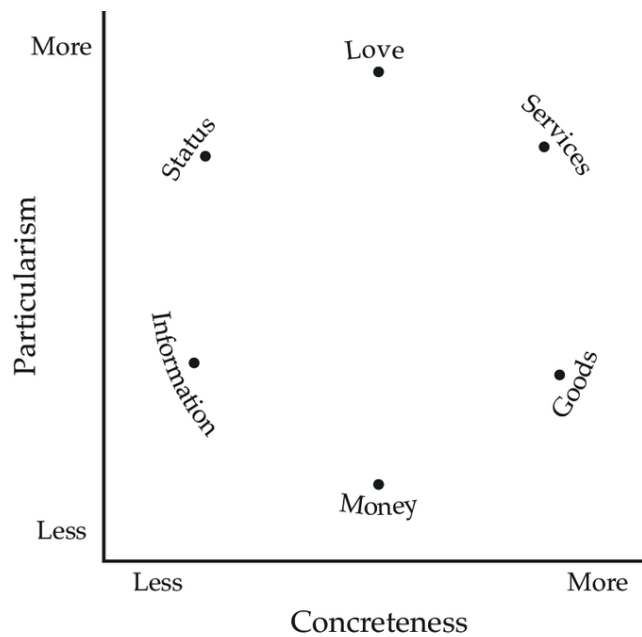
Considerations of distributive justice specifically support understanding of how co-workers and employers believe i-deals should be fairly allocated, and whether these different stakeholders' attitudes towards fair i-deal distribution align. I-deals lead to in-group heterogeneity, so the application of organisational justice theory can support understanding of when these arrangements might conflict with preferences for equal outcomes, versus circumstances when non-equal, individualised outcomes are considered fair. I-deals research to date that has applied principles from organisational justice theory, has often reduced considerations of distributive justice to considerations of equity alone (Greenberg et al. 2004; Lai et al. 2009; Marescaux et al. 2019). However, Marescaux and De Winne (2016) demonstrated that co-workers are not only interested in the equity of i-deals, and in the case of flexibility i-deals are predominantly concerned with an employee's need for such an arrangement. Research accommodating a broader conceptualisation of relevant stakeholders' distributive justice assessments of i-deals is clearly beneficial.

Allowing for, if relevant, co-worker concerns with procedural and interactional justice to emerge may also be enlightening. On the one hand, the unstandardised nature of i-deals may mean stakeholders are less concerned with the procedure that leads to the authorisation or denial of i-deals. However, simply because an outcome is unique is not to say the processes underlying it are. Given the variance in outcomes that inevitably results from i-deals, the fairness of the procedures leading to those outcomes and the communication of those outcomes may actually be of increased importance to third parties when considering whether the divergence from standardised organisational policy is acceptable. Furthermore, this study's exploratory approach to examining stakeholder experiences of i-deals may allow for the identification of any other influences on organisational justice, beyond the well-established dimensions of distributive, procedural and interactional justice that have been suggested to dominate the literature (Rupp et al. 2017).

### 3.2. *Social resource theory*

The resources that are exchanged in organisations (e.g., via i-deals) have been classified by Foa and Foa's (1974; 1980) social resource theory (SRT). They grouped social resources into six categories: status, information, money, goods, services and love. As defined by Foa and Foa (1974; 2012), status indicates a judgment that conveys prestige, regard, or esteem. Information includes advice, opinions, instruction, or enlightenment (but excludes those behaviours that could be classed as love or status). Money is any coin, currency, or token that has a standardised unit of exchange value. Goods are tangible products, objects, or materials. Services often involve labour undertaken for another and are activities that affect the body or belongings of a person. Finally, love is an expression of affectionate regard, warmth, or comfort. It does not have to be romantic, and in an organisational setting may be demonstrated by employers caring for or supporting their employees (Törnblom and Kazemi 2015). These six classes of resources help us to represent the *meaning* behind what would otherwise be an unmanageable number of possible behaviours and exchanges that take place between individuals (Foa and Foa 2012).

The six classes of resources have been organised along two continuums that together form a two-dimensional matrix. One dimension presents resources along a continuum from particularistic to universalistic, and considers the extent that the meaning or value of a resource is tied to its source. For example, love is considered the most particularistic resource: its value depends on who offers it. In contrast, money is the least particularistic resource because it's the most likely of all the resources to retain the same value and meaning regardless of who offers it (Foa and Foa 2012). In between love and money, service and status are less particularistic than love but more particularistic than goods and information, which are more universalistic (ibid). The second dimension considers whether the resources are concrete (tangible) or abstract (intangible). Whereas services and goods involve the exchange of activities or items that are considered to be concrete, status and information are often more symbolic or abstract. Love and money occupy a middle ground along this continuum as they can be both concrete and symbolic. The nature of the resource classes is summarised in Figure 3.1: a circular continuum from Foa and Foa that is regularly presented to illustrate the relative particularism and concreteness of each of their six resource classes.



**Figure 3.1. The six classes of social resources along a circular continuum of particularism and concreteness (Foa and Foa 2012, p.18).**

Foa and Foa's (1974; 1980) resource classes have often been condensed down into only two categories: economic versus socioemotional. Economic resources are considered to be tangible and support financial needs, whereas socioemotional resources tend to be symbolic and particularistic, addressing social and esteem needs (Cropanzano and Mitchell 2005).

Prior work has integrated principles from organisational justice theory and SRT to consider how individuals assess outcomes involving different resources. This research has mostly focused on how the nature of resources affect distributive justice judgements (relatively little is known about how the nature of resources impacts procedural and interactional justice assessments) (Törnblom and Vermunt 2012). For example, because Foa and Foa (1976) suggested that the cost of giving a resource decreases with increasing particularism, Törnblom et al. (1985) put forward that the allocation of scarce and universalistic resources (e.g., money, goods and information) will be assessed against principles of equity, which is a "cost-oriented rule". In contrast, they stated that particularistic resources such as love, status and services would more likely be allocated against principles of need or equality, which are less "cost-oriented". Van Kreveld and van Beemen (1978) reviewed studies examining concrete and abstract resources and concluded that tangible resources were most often distributed equally or equitably. Törnblom and Kazemi (2015) suggest that empirical investigations focused on the specific resource categories indicate that most people prefer love to be allocated equally, status and money equitably, and information equally and on the basis of need. Nevertheless, Törnblom et al. (1985) determined that despite preferences for

certain types of resource to be allocated against specific distributive justice principles, other methods of allocation may still be deemed acceptable. For example, they found that a Swedish sample of participants preferred love to be allocated equally, but that need was an acceptable secondary preference. Tornblom et al. (1985) also observed different preferences for resources to be allocated against specific distributive justice dimensions between American and Swedish samples. Cultural influences on the application of distributive justice dimensions to specific resources were also determined by Törnblom and Foa (1983) and Martin and Harder (1994). Plus, Törnblom and Foa (1983) highlight that context has an impact on the application of different distributive justice allocation principles because it can impact the symbolic meaning of a given resource. For example, they found that the need principle is more likely to be applied in welfare-oriented or caring contexts, whereas equity rules are more likely to be applied in more competitive or economic contexts.

### 3.2.a. *Social resource theory and i-deals*

As highlighted in section 2.2, previous work has considered how the content of i-deals as more or less particularistic and/or tangible can be used to explain i-deal formation and functioning (Rousseau et al. 2006; 2009; Ng and Feldman 2015; Marescaux and De Winne 2016; Guerrero and Challiol-Jeanblanc 2017). However, the research focused on the outcomes of i-deals offering different content has led to inconsistent findings (see section 2.5). A more in-depth integration with SRT considering how the content of i-deals align to Foa and Foa's (1974; 1980) specific classes of resources may also be beneficial. As discussed above, the classes outlined by SRT are intended to represent the *meanings* associated with resources shared through interpersonal exchanges. How the meanings of the resources exchanged through i-deals are actually interpreted by different stakeholders can be more easily accessed by this research's explorative, qualitative approach focused on individual experiences of i-deals.

Given the existing integrations between SRT and organisational justice theory, consideration of the nature of resources offered by financial and flexibility i-deals may support our understanding of 1) the distribution of i-deals by employers (LMs granting of i-deals, RQ1), and 2) why and how co-workers assess i-deals as fair or unfair (RQ3). Plus, the multi-stakeholder approach taken by the research allows for different interpretations of the meanings given to resources to potentially emerge between stakeholders. Disparity in how resources and their meanings are perceived and interpreted by stakeholders could have implications for whether all the relevant parties to i-deals consider the arrangement to be fair.

### 3.3. *Social exchange theory*

The employment relationship has been characterised by the degree to which social/relational and economic/transactional exchanges exist (Blau 1964; Rousseau 1995; Shore and Barksdale 1998; Cropanzano and Mitchell 2005). Understanding of these exchanges has been developed via social exchange theory. Despite some theoretical ambiguities that exist around social exchange theory (see Coyle-Shapiro and Conway 2004), it remains one of the most influential conceptual paradigms in organisational behaviour, HRM and employment relations research (Cropanzano and Mitchell 2005; Cross and Dundon 2019).

Social exchanges (as individual interactions or relationships<sup>1</sup>) tend to be characterised by unspecified mutual obligations and expectations (Cross and Dundon 2019). Rules for social exchanges have been put forward, the most well-known being reciprocity, or repayment in kind (Cropanzano and Mitchell 2005). Different types of reciprocity have been identified within the literature (see Gouldner 1960), including reciprocity as interdependent exchanges, and reciprocity as a norm and individual orientation. Turning first to the former, interdependence is a defining characteristic of social exchanges because inherently for an exchange to take place something has to be given and something has to be returned (Cropanzano and Mitchell 2005). Reciprocal interdependence occurs when one party's actions benefit the other, and the other party responds in kind (ibid). Reciprocity as interdependent exchanges is considered to not include explicit bargaining (ibid) and instead expectations and obligations are unvoiced (Cross and Dundon 2019). Because obligations are unspoken, trust between parties is necessary for social exchanges (Shore et al. 2006) and reduces the risk that either party will not reciprocate for a given benefit (Cross and Dundon 2019). However, building trust in work and employment relationships is not a straightforward process. Just as trust promotes trust, mistrust can provoke mistrust (ibid) and interdependent exchanges can usually only begin when one party makes the first move (Cropanzano and Mitchell 2005). In contrast, reciprocity as a norm and individual orientation is based on the view that individuals ought to reciprocate: it is how they *should* behave. In this regard, Gouldner (1960) speculated that a norm of reciprocity is a universal human principle. Nevertheless, Cropanzano and Mitchell (2005) reflect that there is strong evidence to suggest cultural and individual differences in the extent to which reciprocation is expected and valued.

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<sup>1</sup> The causal relationship between social exchanges as individual transactions and interpersonal relationships remains unclear within the literature, but the details of this theoretical ambiguity and the steps needed for resolution are beyond the scope of this project (see Cropanzano and Mitchell 2005 for a review).

In contrast, economic exchanges reflect employment as being transactional: limited in time and scope to a specified exchange of material resources for job performance (Cropanzano and Mitchell 2005). They are more quid pro quo than reciprocal exchanges. Economic exchanges tend to involve negotiation: parties negotiate rules in the hope of reaching arrangements that are beneficial for them both (ibid), and can encourage the use of leverage and power to obtain desired outcomes (Molm et al. 1999). These economic and transactional exchanges are less likely to produce high quality relationships that increase feelings of commitment (Shore et al. 2006). In fact, the extrinsic motivation that might result from transactional, economic exchanges has been found to be unrelated or even negatively related to positive outcomes such as work performance and affective commitment, but positively associated with negative outcomes such as turnover intention and continuance commitment (Kuuvas et al. 2017).

Social exchange theory and SRT inherently overlap as the nature of exchanges is linked to the resources offered through them (Foa and Foa 1974). Less particularistic and more concrete resources are likely to be exchanged in the short-term, quid pro quo fashion that is associated with economic/transactional exchanges (Cropanzano and Mitchell 2005; Shore et al. 2006). In contrast, socio-emotional outcomes (that are often highly particularistic and symbolic resources) are exchanged in the more open-ended manner associated with social/relational exchanges (Cropanzano and Mitchell 2005; Shore et al. 2006).

### *3.3.a. Social exchange theory and i-deals*

Most of the research into i-deals adopts social exchange theory as its theoretical foundation (Liu et al. 2013; Rosen et al. 2013; Conway and Coyle-Shapiro 2016). This reflects the employee perspective on i-deals receiving the majority of the attention within the literature (Liao et al. 2016), as well as the significant focus to determining the outcomes of i-deals (see section 2.5). A much smaller number of studies have applied social exchange theory to examinations of co-worker responses to i-deals (e.g., Lai et al. 2009). As discussed in section 2.6, the theoretical mechanism linking i-deals to their outcome remains ambiguous. The exploration of research question two can help support understanding of whether employee perceptions and responses to their i-deals being granted can be explained by social exchange theory. The mechanism linking i-deals to their outcomes may differ between arrangements granted by LMs exclusively versus more broadly. Due to the necessity for trust in order for social exchange to take place (Cross and Dundon 2019), reciprocation by employees may also be more likely for ex-post than ex-ante arrangements, as implied by the findings of past research (e.g., Rousseau et al. 2009; Lee and Hui 2011). Plus, previous findings indicate that i-deals of different content vary in orientation as

social/relational or economic/transactional. Therefore, application of social exchange theory and its past integrations with SRT can support understanding of how flexibility versus financial i-deals lead to employee responses.

#### *3.4. The role and influence of line managers*

Research has established that LMs are a key influence on their subordinates' experiences and attitudes at work (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; McDermott et al. 2013), including those subordinates' perceptions of HR practices (Marchington and Wilkinson 2002; Whittaker and Marchington 2003). LMs are often viewed as a representative or agent of the organisation (Gerstner and Day 1997; Purcell and Hutchinson 2007) and are responsible for the implementation of devolved HRM (Guest and Bos-Nehles 2013; McDermott et al. 2015). As such, LMs' formal and informal interactions with employees can shape beliefs about what is expected, valued and rewarded in the employment relationship (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; McDermott et al. 2013). For example, employee beliefs regarding "the extent to which their organisation values their contributions and cares about their well-being" (p.565) has been termed perceived organisational support (POS) (Eisenberger et al. 2002). Due to LMs being considered agents of organisations, subordinate perceptions that their LM values their contributions and cares about their well-being (perceived supervisor support, or PSS) are key to those subordinates' overall beliefs of POS. The implications of subordinates feeling supported by their LM and their organisation are significant for individuals and employers. POS and PSS have both been associated with outcomes such as job retention (Eisenberger et al. 2002), POS has been linked to in-role performance and turnover (Kurtessis et al. 2017), and PSS with job satisfaction, affective commitment and turnover intention (Ng and Sorensen 2008).

Effective line management is needed for positive employee outcomes, both attitudinal and behavioural (Fu et al. 2020). However, previous work distinguishes between intended/espoused and actual/enacted HR practice by LMs, highlighting that their implementation of HRM is often discretionary (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Wilkinson et al. 2017; Fu et al. 2020). This leads to diversity or inconsistency in implementation across organisations (McDermott et al. 2015), when consistency in enactment has been commonly recognised as beneficial for the outcomes of HRM practices (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Fu et al. 2020). To support the consistent implementation of HRM by LMs, past work has emphasised the importance of clear policy and procedure (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Fu et al. 2020).

Yet, the challenges LMs face should not be dismissed or overlooked. Line management roles are multifaceted with competing demands and priorities (Purcell and Hutchinson 2007; Hutchinson 2008; McDermott et al. 2015). Since the demise of the middle manager (Wilkinson et al. 2017), LMs' supervisory responsibilities are often in addition to their own individual outputs and role requirements (McDermott et al. 2015). Consequently, LMs can lack the time needed to carry out all of their duties and may suffer from role overload (Wilkinson et al. 2017). The nature of the LM role also leads to these individuals having multiple stakeholders to manage (Purcell and Hutchinson 2007; Hutchinson 2008; Guest and Bos-Nehles 2013; McDermott et al. 2015). LMs have been described as "the piggy in the middle" of these stakeholders: "on one hand expected to be the voice of management and yet on the other the champion of their team's interests" (Hutchinson 2008, p.1). Furthermore, these different stakeholders may all assess the effectiveness of the HR practices implemented by LMs (Guest and Bos-Nehles 2013), but each use different criteria when doing so (Tsui 1984). Thus, LMs may not be able to satisfy all those invested in their actions, and given findings that in some settings LMs are not always assessed in the people management aspects of their role (Boaden et al. 2008), effective HR implementation may not always be their number one priority. Thus, support from senior professionals (managers) that can inform decision making around the implementation of HR practice (McDermott et al. 2015) may be beneficial to LMs.

#### *3.4.a. Line managers and i-deals*

Given that LMs are typically those who authorise i-deal requests for their subordinates (Hornung et al. 2009; Liao et al. 2017), understanding the influence of LM actions on subordinates is of clear importance to this research exploring experiences of i-deals. Plus, despite some research exploring the LM perspective of i-deals (e.g., Hornung et al. 2009; Laulié et al. 2019), understanding of for whom and why i-deals are being granted by LMs remains limited. Dependent on LM motivations and conditions for granting i-deals (RQ1), i-deals could be perceived as examples of LMs' discretionary and inconsistent implementation of HR practices, or as HR practices that offer both individualisation and consistent implementation (cf. Fu et al. 2020): a distinction that this research may be able to unpick with important organisational implications. Fu et al (2020) suggest that HRM practices combining individual responsiveness and consistent implementation offer stronger associations to job performance than those that are only consistent or individually responsive.

Furthermore, through research question four, which considers the influence of LM flexibility i-deals on subordinate experiences and attitudes, the study can concurrently contribute to the i-



deals literature and that focused on the role of LMs. For the i-deals literature, by considering LMs as those in receipt of flexibility i-deals, and by exploring third-party experiences of these arrangements, this study extends upon the work of Rofcanin et al. (2018) who determined trickle down effects from LM task and developmental i-deals. The study contributes to the LM literature by explicating LMs as the consumers of HR practice and the potential consequences for subordinate experiences and attitudes. While LMs' implementation of devolved HRM and the consequences for employees have been considered, this consumption of HR practice by LMs has been overlooked.

Having established the overall research aim and the specific research questions (in Chapter 2), and having here outlined the theoretical approaches that will support the exploration of these research questions, the thesis will now outline the methodological strategy adopted by the study.

## 4. Methodology

In this chapter, a comprehensive overview of the study's methodology is presented. The review of the literature detailed in Chapter 2 outlines the important insights that i-deals research has provided over the last two decades. However, a somewhat homogenous approach taken to investigating i-deals thus far is also highlighted, with quantitative methods dominant within this body of work. Further, multi-source research is lacking (Conway and Coyle-Shapiro 2016), with most studies prioritising the employee perspective on i-deals. To build upon the existing work, this research seeks to explore the experiences of the multiple relevant stakeholders to i-deals, and adopts a qualitative methodology to support this overarching aim and answer its specific research questions.

Management and HRM research are dominated by quantitative research that advances knowledge, often in incremental ways (Harley 2015). However, the need for methodological diversity has been recognised (*ibid*) and the interest in qualitative research is growing (Bluhm et al. 2011). A qualitative approach to research has been described as unique in its ability to describe, interpret, and explain social phenomena, whereas quantitative research is better suited to, for example, addressing questions of prevalence and generalisability (Lee et al. 1999). Qualitative research actively engages with people, allowing for the exploration of issues that are complex and unquantifiable in nature (Myers 2020). Critically for this research exploring different stakeholder perspectives of i-deals, qualitative methods accommodate understanding of what individuals experience and how they interpret their experiences (Bluhm et al. 2011). Plus, the in-depth understanding of concepts gained from qualitative approaches supports research in generating, elaborating and/or testing theory (Lee et al. 1999; Bluhm et al. 2011). Consequently, qualitative methods allow for research that is both rigorous and relevant in practice (*ibid*): it provides practitioners and policy makers with an increased understanding of the experiences of those whose decisions affect (Walker 1985).

Nevertheless, the applicability and value of any research approach is dependent on the alignment of each of the methodological choices made, and their suitability for addressing the aims and research questions of a specific study. To demonstrate this alignment, this chapter outlines the full methodological strategy of this research. The philosophical underpinnings of the research are outlined, as well as the project's approach to theory building, design and methods (for data collection and analysis). Methodological and ethical considerations are also discussed.

#### 4.1. *Philosophical underpinnings: interpretative phenomenology*

The aims and research questions detailed in section 2.10 are underpinned by philosophical assumptions regarding the nature of the social world and what is accepted as knowledge. These philosophical assumptions are best described by interpretative phenomenology, the ideas of which were developed by Martin Heidegger (Conroy 2003). It has been claimed that interpretative phenomenology challenges traditional epistemological and ontological debates (Moran 2000) because it is concerned with both the objective and the subjective (Sinha 1969; Caelli 2000). For example, unlike other approaches upon which qualitative investigations tend to be grounded (e.g., social constructionism, discussed further below), interpretative phenomenology is grounded within a realist ontology: it assumes that parts of the world exist in their own right and are therefore “real”. Heidegger has been described as a “minimal hermeneutic realist” (Dreyfus 1991). A minimal hermeneutic realist recognises that parts of the world are “real” in that they exist separately from us. However, they also believe that there is no way for people to access this separate existence, because we can only understand these objects or concepts as a function of our own experiences or involvement with them. It is therefore us who decides what – as it is experienced in the context of our own lives – is “real” and what is not (Larkin et al. 2006). As such, interpretative phenomenology is focused on understanding individuals and their interactions with their environment, and phenomenological researchers are often interested in examining subjective human experiences (Lopez and Willis 2004). This clearly aligns to the aims of this study and the exploration of multiple stakeholders’ experiences of the formation and functioning of flexibility and financial i-deals.

To be clear regarding the foundations and intentions of interpretative phenomenological research, it is necessary to highlight the differentiators between it and other forms of phenomenology and hermeneutics. Unlike descriptive phenomenology, interpretative phenomenology seeks to go beyond merely describing core concepts and looks for the meanings embedded in experiences (Lopez and Willis 2004). Interpretative phenomenology believes that while meanings are not always clear to the participant, they can be gleaned from the accounts these individuals put together (Lopez and Willis 2004). As for justifying the choice to ground this particular research in principles of interpretative phenomenology rather than descriptive phenomenology, some would argue that this is not a choice that can be made and simply comes down to a researcher’s epistemological and ontological assumptions (Gill 2014). Nevertheless, the link and relevance between the philosophical underpinnings of interpretative phenomenology and the research questions should be clear. Interpretative phenomenology suggests that to gain

an understanding of, for example, “why and how do co-workers assess i-deals as fair or unfair?” (RQ3), an “interpretative leap” is required (Osborne 1994, p.174) beyond merely the description provided by the participant (as would be dictated by descriptive phenomenology). As outlined above, an interpretative phenomenological approach searches for meanings embedded in the narratives that respondents provide on the topic, in order to move beyond what they consciously know (Lopez and Willis 2004). The use of, for example, organisational justice and social resource theories, helps us to make this interpretative leap and address gaps in our understanding of different stakeholders’ experiences of i-deals. The use of theory in this way would be not be aligned to a descriptive phenomenological approach that instructs researchers to shed themselves of all prior subject knowledge. The approach taken by this research is better aligned to the beliefs of interpretative phenomenology that state: 1) presuppositions and expert knowledge are valuable guides and make the research project a meaningful task (Lopez and Willis 2004), and 2) theory can be used to inform both the process of conducting research and the research findings (ibid). In this regard, the interpretative phenomenological underpinnings of this research are also well-aligned to its abductive approach to theory building (discussed in the next section).

As well as explaining the use of interpretative phenomenology as opposed to other forms of phenomenology, it is also important to explain its use over other common alternatives associated with qualitative research. Interpretivism is often used an umbrella term which subsumes a number of anti-positivist positions (e.g., Bryman and Bell 2007). Such descriptions tend to include phenomenology as one example of many interpretivist approaches (e.g., Schwandt 1994; Bryman and Bell 2007), thus no attempts are made here to differentiate interpretative phenomenology from interpretivism. Social constructionism however is a distinct epistemology that views reality as being socially constructed (Saunders et al. 2019): it suggests that people play an active role in creating, reinforcing and recreating their own realities (Gurney 1999). Social constructionist research aims to understand the way people create meaning through language and social interaction (Crotty 1998). Research methodologies based upon social constructionism are most often concerned with capturing and analysing language (Bryman and Bell 2007): the use of this language is in its own right of interest to the topic of study. While interpretative phenomenology shares similarities with social constructionism in that it is interested in the subjective, it aims to get beyond the culturally bound understanding of individuals, and understand phenomena as they are directly experienced (Lopez and Willis 2004). Phenomenological approaches like interpretative phenomenology use verbal data as a way of accessing people’s lived experiences, rather than being interested in the story of an experience (Lopez and Willis 2004). Again, it could

be argued that the underpinnings of the study are representative of the philosophical assumptions of the researcher, rather than a strategic choice. Indeed, some may consider it valuable or of interest to conduct a research study grounded in social constructionist ideas that considers what the language of organisational members tells us about i-deals. Nevertheless, the specific research questions being considered by this study encourages exploration of individuals' direct experiences of i-deals.

#### 4.2. *Abductive research approach*

The study's approach to theory development has been that of abduction. Determining this approach early on in the research process is important as it influences and enables decision making regarding the research methodology: from research design, to data collection method and analytic strategy (Saunders et al. 2019).

To theorise is to infer convincing explanations which are grounded in data (Ashworth et al. 2019). In effect, abduction combines deduction and induction (Suddaby 2006), but the logical reasoning behind the inferences it makes is distinct from them both (Tavory and Timmermans 2014). Abduction does not look to test a rule nor seek to infer. Instead, it searches for explanations (Mantere and Ketokivi 2013). Abduction achieves this by considering an observation in line with other existing observations and rules, and presenting a possible explanation (Tavory and Timmermans 2014).

While deductive approaches are valuable for confirming or disapproving expectations, they are poor at ruling out alternative explanations (Mantere and Ketokivi 2013; Ashworth et al. 2019). They are therefore not well suited to the aims of this research seeking to increase our understanding of different stakeholder's experiences of i-deals that have been frequently overlooked. Instead, alternative approaches to theory development than deduction are necessary, and while inductive approaches are suited to qualitative studies and are grounded in research data, they have been criticised for underplaying the importance and value of pre-existing theory (Ashworth et al. 2019).

An abductive approach can be used to elaborate and generate theory (Ashworth et al. 2019) and has been described as more representative of the process actually undertaken by many organisational researchers, given that pure deduction or induction are difficult to achieve (Saunders et al. 2019). Abduction stems from puzzles or "empirical surprises" (Tavory and Timmermans 2014, p.123). These findings are surprising because existing theories do not explain them in full (Patokorpi and Ahvenainen 2009; Ashworth et al. 2019), and abduction works to find

a plausible explanation (Patokorpi and Ahvenainen 2009; Ashworth et al. 2019). The result is that abduction engages with existing theories more extensively than induction (which does so at its end stage) and deduction (which does so at the outset) (Ashworth et al. 2019). Through a combination of deductive and inductive reasoning, data and theory supplement each other and new explanations are developed in response to the puzzle that has been identified (Mantere and Ketokivi 2013). Theory brings to light themes within the data that might otherwise be missed, in order to form new theoretical propositions that the empirical observations can then help to evaluate (Tavory and Timmermans 2014; Ashworth et al. 2019).

As a broad strategy for theorising, rather than simply an analytical process, the execution of the abductive approach taken by this study is presented in the subsequent sections detailing its research design and methods.

#### *4.3. Comparative case study design*

The research design adopted was that of a comparative case study focused on two organisations<sup>2</sup>. The first section defines case studies as a research design, then moves on to outline the appropriateness of this choice for this research given its interpretative phenomenological underpinnings, abductive approach to theory building and the overarching aim of exploring multiple perspectives on the formation and functioning of i-deals. The second section outlines the selection of InsuranceCo and ConstructionCo as its research sites.

##### *4.3.a. Introduction to Case Studies*

Despite case studies being common (Yin 2014) and considered important (Mariotto et al. 2014) within organisational research, it is a form of research inquiry that is often misunderstood (Easton 2010; Yin 2014). Historic definitions appear to confuse case study research with the act of carrying out field-work, limiting it to data collection methods such as participant observation or ethnography (Yin 2014). This error now seems to have been largely overcome and case study research is better understood as having its own “logic of design” (Platt 1992, p.46) and being a strategy for research to employ in appropriate circumstances (Platt 1992). However, it remains hard to define (Easton 2010; Yin 2014): there appears to be little agreement as to what a case

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<sup>2</sup> Originally, the research had intended to include a third case study within its design: a small professional service company (less than 20 employees) with whom provisional research access had already been negotiated. However, during the process of the project being considered by the Cardiff Business School Ethics Committee, concerns were flagged surrounding the difficulties in ensuring the confidentiality and anonymity of participants within such a small organisation. Consequently, the decision was made to not collect data at this site and focus on InsuranceCo and ConstructionCo only.

study actually is (Lincoln and Guba 1985; Mariotto et al. 2014) and different explanations of what constitutes a case study can be found across the social science methodological literature. Nevertheless, definitions of case studies do mostly share two specific features. First, the focus of case study research on an individual unit (e.g., a group, community, or event) is often highlighted by definitions of the research design. For example, Eisenhardt (1989, p.534) states case studies are focused on “understanding the dynamics present within single settings.” Second, the importance of contextual understanding when conducting case study research is frequently emphasised. For example, Yin (2014, p.16) states that a case study “is an empirical inquiry that investigates a contemporary phenomenon ... in depth and within its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident.” Similarly, Stake (1995, p.xi) states that case studies examine “the particularity and complexity of a single case, coming to understand its activity within important circumstances.” In case study research, attempts are not made to isolate the phenomenon being examined from its context (as is the aim of laboratory research) because the researcher is interested in understanding how processes or behaviour(s) are influenced by that context (Hartley 2004).

This research specifically adopted a comparative multi-case design: it explored stakeholder experiences of i-deals within two organisations: InsuranceCo and ConstructionCo (see section 4.3.b for details on the research sites). The appropriateness of this design for this research project will now be considered.

First, the suitability of case study designs for research that is rooted in assumptions of interpretative phenomenology and adopts an abductive approach is presented. Yin (2014) states that case studies embrace different philosophical orientations, both realist and interpretivist. In this regard a case study design works well for interpretative phenomenological research that is concerned with both the subjective and objective (see section 4.1). Case studies allow for embracing interpretative phenomenology’s interest in the subjective if designed in a way that captures the perspectives of different participants, and how and why these inform the topic of study (Yin 2014).

Furthermore, Yin (2014) claims that to effectively design case study research, a researcher is forced to consider and develop some preliminary theory related to the topic of study. This early theory development provides a blue-print for the research: some guidance on the data to collect and some strategy for data analysis (Yin 2014). This highlights the applicability of a case study design for research underpinned by interpretative phenomenology, which as previously discussed

embraces the use of theory to focus an investigation (Lopez and Willis 2004), and for an abductive research approach that goes backwards and forwards between theory and data.

Eisenhardt (1989) describes the process of theory building from cases as starting with the definition of research questions and the specification of tentative, theoretical constructs prior to data collection taking place. An overlap between the data analysis and data collection is then encouraged in order to take advantage of the flexible nature of data collection within case study research. This allows for adjustments to be made in line with the data being collected and its connections to existing theory (Eisenhardt 1989). Eisenhardt (1989) and Eisenhardt and Graebner (2007) describe this process of building theory from case studies as inductive, but Ann Langley (as described in Gehman et al. 2018) states this it is better described as abductive, in line with the description of the approach adopted by this research.

The suitability of case studies for theory building (Eisenhardt 1989; Hartley 2004) further demonstrates the applicability of the design for the aims of this exploratory research project that has sought to build theory and increase our understanding of multiple stakeholders' experiences of i-deal formation and functioning. Eisenhardt (1989) claims that the development of theory is central to organisational research and that case study designs are key to tying theory to empirical data. Eisenhardt (1989; Eisenhardt and Graebner 2007) states that the criticism that developing theory through case study designs is compromised by the researcher's preconceptions is unfounded, and that the constant interaction with conflicting ideas in an empirical case keeps researchers honest and true to their data. The use of case study designs can lead to propositions which are closely tied to reality (ibid) and less biased than other methods of theory building (Eisenhardt 1989). Further, the use of a comparative case study design, examining two cases, allows for an even stronger base for theory building (Yin 2014). More than one case enables comparisons that help to clarify whether a finding is replicated and consistent across different contexts (Eisenhardt and Graebner 2007). Because multiple-case research allows for the identification of relationships that are replicated across cases, the researcher and readers can have greater confidence in the findings (Yin 2014) and the resultant theorising is often more parsimonious and robust: characteristics of superior theory (Eisenhardt and Grabner 2007).

Turning to the suitability of case study research for addressing the specific aims of this research, Yin (2012) suggests the choice to use a case study design depends on the research questions a study is trying to address. Case studies are suited to both descriptive – "what?" – questions (Yin 2014) and explanatory – "how?" – questions (Hartley 2004; Yin 2014): both of which apply to the research questions examined by this study (see section 2.10). In fact, Yin (2012) claims that



alternatives to case study designs are unlikely to provide the rich description or insightful explanations to most satisfactorily address these types of research question. In this research, a (comparative) case design allowed for the contextual understanding to emerge that was key to accurately identifying i-deals and separating them from standard organisational policy and practice (in accordance with the conceptualisation of i-deals presented below). In this regard, the research is an example of an “instrumental case” (Crowe et al. 2011) because knowledge of the case organisations (InsuranceCo and ConstructionCo) was of secondary interest and played a supporting - but vital - role in increasing understanding of stakeholder experiences of i-deals.

#### *4.3.b. Selection of research sites: InsuranceCo and ConstructionCo*

The two cases examined were InsuranceCo and ConstructionCo (pseudonyms). InsuranceCo is a large (approximately 10,000 employees) private sector, financial services company best known for its provision of insurance products. It has a head office in the south east of the UK that is contractually listed as the majority of employees’ place of work, although there are also multiple regional offices around the country. ConstructionCo is a medium sized (approximately 200 employees) family-owned construction firm that mainly provides house building services. Due to the nature of the services offered, employees can be based across construction sites around the UK as required, but a head office based in Wales acts as the main hub for operations.

These sites were theoretically (as opposed to statistically) sampled. Theoretical sampling is relevant to research seeking to develop rather than test theory (Eisenhardt and Graebner 2007), as cases are selected with the aim of “illuminating and extending” understanding (Eisenhardt and Graebner 2007, p.27). Both organisations promote flexibility in their management practices and encourage the use of at least some forms of i-deal. Conversations with HR representatives at InsuranceCo and ConstructionCo confirmed a dedication as part of their HRM strategy to increase the use of individualised approaches to managing certain aspects of their employment relationships. Consequently, the cases were considered an environment where i-deals would be prominent enough for various stakeholders’ experiences of i-deals to be explored.

As a comparative case study, the theoretical sampling of the cases is based on the potential to contribute to theory development rather than the uniqueness of the case(s) (Eisenhardt 1989; Eisenhardt and Graebner 2007). The comparative design and selection of InsuranceCo and ConstructionCo as research sites supported the exploration of multiple stakeholder’s experiences of i-deals across organisations of differing sizes, in different sectors and with different levels of formality in their policy approach to managing flexible working and reward. Whereas InsuranceCo

had published guidance relating to flexibility in employees' working hours and location, no such policy or formal guidance was available at ConstructionCo. InsuranceCo's policies and processes relating to employee pay and reward were well established and highly formalised.

ConstructionCo's pay and reward procedures were standardised, but these had been updated and implemented in the 12 months prior to data collection. Exploring experiences of i-deals within these different environments allowed for the replication of data collection and findings across these different contexts, and therefore the elimination of alternative explanations for those findings (Eisenhardt and Graebner 2007; Yin 2014).

As discussed, the case study design allowed for the contextual understanding needed to accurately identify i-deals and separate them from standard organisational policy and practice. Next, the study's conceptualisation of i-deals is presented, alongside relevant contextual information on the two case studies.

#### *4.4. Conceptualisation of i-deals and case context*

Given the qualitative nature of the research, and without the use of established survey measures, a clear conceptualisation of i-deals was necessary. This ensured the study was truly examining individual's experiences of i-deals, and not other forms of HR or management practice. For this purpose, particular attention was paid to ensuring described arrangements consistently matched the following characteristics of i-deals: 1) they are bargained for individually, and 2) they are heterogeneous, offering special terms that differ to those offered to other employees, thus creating within-group differences in employment conditions (Rousseau et al. 2006; Liao et al. 2016).

For flexibility i-deals, described arrangements needed to have been explicitly requested and agreed upon, and not simply be a consequence of having autonomy over one's own working schedule or location, or flexible working approaches that were accommodated within the specific culture of that organisation or that individual's team. At InsuranceCo, opportunities for some forms of flexible working were more normative than at ConstructionCo. To illustrate, many interviewees at InsuranceCo suggested that they could, without explicit permission, work from home on Fridays and that many people in their team or department took advantage of this. However, departmental or team level differences did exist and this flexibility was not allowed or supported in certain teams. This was demonstrated by the collected data. For example, one interviewee explained that within her team it *would* be necessary to gain permission in order to work away from the office, and that she had in fact made a request to work from home on Fridays

but it was declined. For working schedules, the situation was similar. Numerous interviewees suggested there was a degree of flexibility in their working hours, and that there was an unwritten understanding that they could start their working day between 8am and 10am and finish between 4pm and 6pm without seeking permission. In support of this more normative approach to flexible working, certain business activities (e.g., team meetings) were described as being scheduled to take place between 10am and 4pm, and not outside of these hours. In these contexts (departments or specific teams), only more drastic changes to working times or a change to the actual number of hours being worked would require a flexibility i-deal. In contrast, in other departments this level of flexibility was not widely adopted and working hours were standardised in line with the formal employment contract (9am to 5pm for full time staff). Again, this difference was reflected in the data with one line manager describing their consideration of a specific request from an employee to start work at 9:30am each day. At ConstructionCo, opportunities to work in any way flexibly without an i-deal were less common. Descriptions from interviewees suggested the majority of employees worked standard hours as outlined in their employment contract. In comparison to what was accommodated for many at InsuranceCo, a specific arrangement that allowed an employee at ConstructionCo to work from home every Friday clearly fit all of the criteria of an i-deal.

As noted in the review of the i-deals literature (see section 2.2), the categorisation of i-deals that lead to the personalisation of working hours and/or location has been disputed. Some work has categorised i-deals related to working hours/schedule separately to those related to working location (e.g., Rosen et al. 2013), whereas others have grouped them together (e.g., Rousseau et al. 2016). Due to the qualitative nature of this research, and without the use of established survey measures to capture and distinguish between i-deals, the grouping of the arrangements by this study has been based on the descriptions and categorisation presented by the interviewees. While interviewees specifically discussed both individualised working hours and working location, almost all interviews bracketed these elements together within one category which they most often called a “flexible working arrangement” or “flexible arrangement”. Additionally, numerous examples where individuals or colleagues had negotiated both a change in location and hours were presented by interviewees, and when this occurred the individualised terms were always described as one arrangement or deal. Taking all of the above into account, for the presentation of the findings of this research it was considered most reflective of interviewee attitudes and experiences to group i-deals related to working schedule/hours and location together, under the title of flexibility i-deals.

As with flexibility i-deals, to qualify as a financial i-deal any arrangement needed to have been explicitly requested and authorised. At both research sites, standardised approaches to managing pay and benefits were determined at the organisational level. For pay, both case organisations had annual pay reviews to standardise the timing and levels of any pay increases. They also used salary bands to specify minimum and maximum salary thresholds for each role within the organisation. To be considered an i-deal, arrangements related to pay must have led to a change separate to that provided by the annual review, and/or have increased the employee's pay to above the maximum threshold dictated by the relevant salary band. Turning to benefits, ConstructionCo had specified benefits offered at fixed levels (e.g., a set percentage for employer pension contributions). InsuranceCo had a flexible benefits system allowing employees to opt in or out of a range of benefits as well as adjust their level of coverage (e.g., death in service benefit). For an arrangement to qualify as a financial i-deal, an employee needed to have negotiated for either a benefit already offered but at an increased level to that normally available, or a separate benefit that is not normally covered by the company offering.

Within the existing literature, i-deals related to pay and reward/benefits have been grouped together under the category of "financial i-deals" (Rosen et al. 2013; Ho and Kong 2015; Ho and Tekleab 2016). While some arrangements described by interviewees related to either only pay or benefits, when individualised terms related to both these elements interviewees tended to group these together as the "remuneration package" and present them as one rather than separate arrangements. Reflecting the attitudes and experiences of the interviewees, and in line with the existing literature, i-deals related to pay and/or benefits are grouped together in the findings of this research and categorised as financial i-deals. However, where any differences emerged between experiences and attitudes to i-deals related exclusively to pay and those exclusively to certain benefits (e.g., holiday entitlement) this is made clear in the narrative presentation of the findings.

#### *4.5. Research methods*

Next, the chapter considers the project's research methods and their appropriateness for the study's overall aim and specific research questions. Details of the research samples and the data collection approach are outlined.

##### *4.5.a. Research samples*

The unit of analysis for this study is the experiences of i-deal stakeholders. The only inclusion criterion for participation in the study acted to ensure that data was collected from respondents

relevant to the overall research aim (understanding multiple stakeholders' experiences of i-deals), i.e., that the interviewees were any of the following:

- an employee in receipt of an i-deal;
- a co-worker (including a subordinate) of an employee in receipt of an i-deal;
- a line manager (LM) of an employee in receipt of an i-deal;
- a HR representative linked to any i-deals created within the organisation (e.g., who works with the area of the business where a particular i-deal has been negotiated).

For the purpose of data collection, two separate samples of individuals were interviewed: one within each case organisation. Each of the perspectives listed above were represented in each sample. This allowed for the research questions to be considered both within and across the case contexts during data analysis. However, as the themes in response to the research questions were consistent across the case organisations, the write up of the research findings draws upon the data set as a whole (see section 4.6.b for more detail). In total, 57 individuals volunteered to take part in the research study and were interviewed. 42 interviewees were employed by InsuranceCo, and 15 by ConstructionCo. Numerous interviewees fell into multiple categories (e.g., LMs and HR representatives had i-deals themselves, employees with i-deals were also subordinates of LMs with flexibility i-deals etc.). In total, 31 of the interviewees had some form of i-deal, 18 were LMs, 9 were HR representatives, and 19 were subordinates of LMs with flexibility i-deals. Nine interviewees were exclusively co-workers to an i-deal recipient (i.e., didn't fall into the other stakeholder categories), although all of the LMs, HR representatives, subordinates, and employees with i-deals also considered themselves to be a co-worker to an i-deal recipient. A full breakdown of each of the samples, detailing the interviewees (listed by their pseudonym), their roles (LM, HR, employee, co-worker, subordinate), gender identity, tenure, and the nature (face to face or telephone) and duration of their interview can be found in Appendix 1 (job titles are not included to ensure protection of the interviewees' identities).

Samples comprising of each of the perspectives listed (LM, HR, employee, co-worker, subordinate) were selected in order to best address the research questions (see section 2.10) that specifically consider different stakeholder perspectives and experiences of i-deals. Each of the four research questions are predominantly focused on different stakeholder perspectives on i-deals (RQ1: employers, RQ2: employees, RQ3: co-workers, RQ4: LMs with flexibility i-deals and their subordinates). Nevertheless, individual respondents were, where relevant to their experiences, questioned on areas of i-deal formation and functioning considered by numerous

different research questions. For example, employer representatives were also questioned on their perceptions and experiences of employee responses to i-deals, and employees with i-deals were asked to reflect upon their co-workers' reactions to their arrangement. One reason for this was practical: numerous interviewees fell into multiple categories and represented more than one type of i-deal stakeholder (as highlighted above). The second reason for this was in support of the multi-source approach taken by the study. Collecting data from multiple perspectives is increasingly encouraged to effectively examine organisational phenomena (Eisenhardt and Graebner 2007; Bou-Llusar et al. 2016; Troth and Guest 2019). Bou-Llusar et al. (2016) claim that a single perspective is unlikely to provide accurate information regarding all of the factors impacting upon organisational scenarios and that a more appropriate approach is to collect data from multiple sources by selecting key and knowledgeable informants who may provide differing perspectives. Plus, Eisenhardt and Graebner's (2007) approach to theory building from case studies encourages the collection of data from numerous "knowledgeable informants who view the focal phenomena from diverse perspectives" (p.28). A multiple-stakeholder approach has been highlighted as particularly valuable in organisational research that takes a psychological and micro-level approach (Troth and Guest 2019). Troth and Guest (2019) state that such an approach can highlight the impact of HRM strategy on employees and moves the field away from a narrow focus on organisational outcomes: something that they claim is needed for the continual development of HRM research.

Sampling took place on a volunteer basis at both research sites. Employees, managers and co-workers (including subordinates) were recruited through a research advert (see Appendix 2) posted on the organisations' intranets. The advert provided information on the study and asked for volunteers to contact the researcher via email. Access to both organisations was negotiated through the HR departments, meaning HR representatives were already aware of the study. Consequently, in order to recruit HR representatives for the study a group email (blind cc'd) was sent to both HR departments inviting volunteers to be interviewed (with a reminder that their involvement was voluntary).

Initially it had been planned that the HR teams would identify potential participants who the researcher would then approach with information on the study and ask if they would like to take part. Snowball sampling would have subsequently built upon this. However, during the process of the research being considered by the Cardiff Business School Ethics Committee, concerns were raised regarding the anonymity and confidentiality of the participants should this approach be taken, as well as the potential for individuals to feel pressured into participating. Instead, it was

suggested that the study be advertised, inviting volunteers to contact the researcher directly. Furthermore, initially the intention was to attempt to interview the various organisational stakeholders relevant to *specific* i-deals (interviewing specific triads, e.g., an employee with an i-deal, *their* manager and one or more of *their* co-workers). However, the amended approach to sampling made this scenario unlikely at InsuranceCo given its size. At ConstructionCo, which is significantly smaller, volunteers representing different perspectives towards the same i-deals did, coincidentally, volunteer and were interviewed. Nevertheless, the change in sampling method altered the data collection approach taken by the research, although it remained possible to explore different stakeholders' attitudes and experiences of i-deals in a manner that addressed the research questions and provided rich and relevant data.

Data collection (discussed further below) and recruitment of participants within InsuranceCo took place over 6 months. During this time, the research advert was posted three times. On each occasion, the advert was posted and interviews were set up and then conducted with the volunteers before the advert was re-posted. On the third occasion posting the research advert, responses were minimal and data collection at InsuranceCo drew to a close once those final interviews had taken place (42 respondents in total). The access terms at ConstructionCo allowed for data collection to take place over a single two-week period. Consequently, the research advert was posted once and interviews were set up with all the volunteers who responded (15 respondents in total).

#### *4.5.b. Data collection*

In order to collect the data obtained by this research, qualitative semi-structured interviews were used. The following section will introduce qualitative semi-structured interviewing as a research method, detail its main features, and present the rationale for its use by this study. Once this has been achieved, a second section will detail the process of preparing for and carrying out interviews for this research.

##### *4.5.b.i. The use of qualitative, semi-structured interviews*

Despite the interview being probably the most widely used method in qualitative research (Bryman 2012), only within the last three decades has it started to be reflected upon methodologically. Historically, qualitative interviewing was one of the data collection methods least explicated within the theory of science, perhaps as a result of it being regularly dismissed as unscientific by those with a positivist perspective (Kvale 1983). The purpose of the qualitative interview is to gather descriptions and understand the "life-world" of the interviewee (Brinkman

and Kvale 2015). The interview seeks to understand the meaning of central topics within this life-world as they are presented by the interviewee. The researcher's role is to take in and unravel the meanings of what is said (Kvale 1983; Brinkman and Kvale 2015). As such, while everyday conversations tend to take place on a factual level, qualitative research interviews aim to cover both a factual and meaning level by interpreting what is being communicated explicitly and implicitly (Kvale 1983; Brinkman and Kvale 2015). In order to achieve this goal, interviewees are asked and encouraged to describe as precisely as possible what they experience and feel, as well as how they act. The focus is on accessing nuanced descriptions from interviewees, with the questions of *why* the subjects experiencing what they do and acting as they do being primarily tasks for the researcher to evaluate (Kvale 1983; Brinkman and Kvale 2015).

Before discussing the main features of the qualitative interview, and simultaneously demonstrating its use as appropriate for this research, alternative approaches to qualitative data collection and why these were less suited to the aims and background of this project are outlined. One alternative method for collecting qualitative data is participant observation. It is a particularly popular choice within case study designs as it allows the researcher to observe how individuals behave in the particular context or case of interest (Bryman 2012). However, in this instrumental case where the research is focused on specific research questions and knowledge of the case is secondary, interviews are better suited. Interviews are better able to produce the knowledge and understanding that is needed for the substantive topic being explored, while still allowing for the generation of an intensive, detailed examination of the case context (Bryman and Bell 2007). Participant observation can provide a great depth of detail but can be lengthy and is likely to produce a lot of irrelevant data (Bryman 2012) because the behaviours observed may be unrelated to individuals' experiences of i-deals. Interviews allow for more efficient access to multiple organisational stakeholders' experiences of i-deals.

Furthermore, participant observation is not suited to the phenomenological underpinnings of this research as it does not provide access to lived experiences from the perspectives of the individuals. Englander (2012) claims that the two ways to gather information about the lived experiences of a person are through interviewing them or asking for a written or recorded account. He claims that in order to get the complete description required by phenomenological research, the interview is the more appropriate of these options as it is often longer and produces a richer, more nuanced and in-depth account.

Finally, although focus-groups are sometimes classified as a form of *group* interview, this method would not have been as suited as one-on-one interviews for this research project. While focus



groups are useful for understanding how people interact and respond to each other, they do not allow for an in-depth exploration of one participant's perceptions, experiences and attitudes (Wallace 1984). Plus, group interactions are less suited to discussing experiences of i-deals given the potentially sensitive nature of both these arrangements and relevant stakeholders' responses to them.

More appropriate than all of these approaches, the qualitative interview as a research method is inherently based upon the role of conversation as the basic mode of human interaction. It is through this method of communication that we get to know other people and learn about their experiences, feelings, and attitudes (Brinkman and Kvale 2015). Thus, the underlying assumptions of interviewing as a data collection method are well aligned with research that is underpinned by interpretative phenomenology and focused on accessing and understanding lived and subjective experiences (Lopez and Willis 2004).

Qualitative interviewing tends to be seen as a flexible research method that responds to the direction that the interviewee takes the conversation in. The researcher may even adjust the emphasis or main focus of the research as a result of emergent issues during the data collection process (Bryman 2012). As such, qualitative interviews are truly a knowledge producing activity, making them well suited to the exploratory and abductive nature of this research. They allow for the exploration of unanswered questions identified from the existing i-deals literature, but also for the emergence of unanticipated themes through the interviewees' narratives. However, the flexibility of the qualitative interview should not mean it is confused with a free-flowing conversation. The qualitative research interview remains a professional conversation with a specific purpose: it is an "inter-change of views... about a theme of mutual interest" (Brinkman and Kvale 2015, p.4). With this in mind, Kvale (1983) claims that all research interviews are semi-structured, although others (e.g., Bryman 2012) refer to qualitative research interviews as having the potential to be either semi-structured or unstructured. In either interpretation, the interviews used within this research would be considered semi-structured.

With semi-structured interviews, the researcher has a list of questions or an inventory of issues to be covered (Bryman 2012) and the interviewees should have flexibility in how to respond (Bryman 2012). Through open questions the interview is focused on the research topic selected by the researcher, but it is up to the interviewee to highlight the dimensions they find relevant and important within this general theme (Kvale 1983; Brinkman and Kvale 2015). Even in semi-structured interviews, the questions that the researcher asks may not follow exactly as outlined in the interview schedule or guide (Bryman 2012). Similar but not identical questions will be used in

each semi-structured interview for a particular research study and questions that are not included in the guide may be asked as the interviewer picks up on ideas or descriptions presented by the interviewees (Bryman 2012). Semi-structured interviews were suited to this research because the investigation had a predefined theoretical and substantive focus to address. Using semi-structured interviews allowed for a balance to be struck between exploring the pre-defined topic and enabling the interviewees to express their own interpretations and/or any unanticipated attitudes towards or experiences of i-deals.

In summary, the qualitative interview was well suited to accessing individuals' experiences and strongly aligns to the interpretative phenomenological underpinnings of this research. Through the use of a semi-structured approach, the interviews were a knowledge producing activity that aligned to the exploratory and abductive nature of the study. In comparison to other qualitative data collection methods, the semi-structured interview was best suited to the philosophical underpinnings and overall methodological strategy of the project, as well as its aim to increase our understanding and develop theory related to different stakeholder experiences of i-deal formation and functioning.

#### *4.5.b.ii. The data collection process*

The process of carrying out the qualitative interview starts long before sitting down with the interviewee. First, it is necessary to prepare the script or interview guide/schedule. The extent that the interview is structured (see previous section) dictates whether the guide contains merely a list of topics to cover or a detailed sequence of clearly worded questions (Brinkman and Kvale 2015). In this case, extensive schedules of suggested questions (see Appendices 3, 4, 5 and 6), as well as a more general list of topics to be covered by the interviews (see Appendices 7, 8, 9 and 10) were produced for each perspective relevant to the study. A rationale for producing both of these sets of documents was that the exploratory nature of the project and initially very broad research questions (see section 4.6.b for detail on the refinement of the RQs) meant the detailed schedules were very comprehensive. A number of prompts for most questions were included in order to cover a range of possible avenues that the interview could take. However, with such a range of possibilities for the interviews, having a list of general topics that could be easily followed as the interviews progressed helped to ensure that none of the key themes were missed regardless of the direction that the conversation took.

Turning to the content of these interview schedules (see Appendices 3, 4, 5 and 6), interview questions broadly related to interviewees' biographies and work roles, and their experiences of

and attitudes towards i-deals (their own and/or others). Theoretically, an interview question can be assessed across two dimensions: the thematic and the dynamic. The thematic dimension considers the knowledge that is produced by a question (Brinkman and Kvale 2015). The form of knowledge that is desired will impact upon the nature of the interviews and the specific questions that are asked. The interviews for this study were both conceptual and narrative in nature. Specific questions sought to access the interviewees' understanding of and attitudes towards the formation and functioning of i-deals (conceptual). However, questions were also asked that sought out concrete descriptions of experiences of i-deals (narrative) that would either support or contrast with the understandings provided (Brinkman and Kvale 2015).

The dynamic dimension is concerned with the interpersonal relationship between the interviewer and interviewee, as developing rapport is crucial to the qualitative interviewing process (Brinkman and Kvale 2015). Brinkman and Kvale (2015) state that questions should encourage a positive interaction where the conversation flows and encourages (but does not lead) interviewees to talk about their experiences, attitudes and feelings. To this end, they suggest that questions should be easy to understand and free of academic language. For this reason, the questions drafted and posed to interviewees as part of this study did not use the term "idiosyncratic deal", but instead "individualised" or "personalised arrangement". The term "idiosyncratic deal" was considered to be unfamiliar and overly academic for the purposes of the data collection interviews. Where possible, the interviewee's own phrasing and terminology was adopted within each interview (Holloway and Jefferson 2000) to encourage the development of rapport and a trusting and comfortable relationship.

As mentioned above, two interview guides were produced for this research: one with specific interview questions to be posed and the other with more general research themes. One rationale for this choice has been outlined above, but a second falls in line with a recommendation made by Brinkman and Kvale (2015) to help fulfil both the thematic and dynamic dimensions of interview questions. The list of specific interview questions was written to represent the everyday language of the interviewees and help maintain a positive interview interaction (the dynamic dimension). In contrast, the general research themes listed were presented in theoretical language, allowing for the tracking of the thematic dimension of the interview (Brinkman and Kvale 2015). This turned out to be a particularly helpful approach due to the common occurrence of interviewees raising themes out of sequence with the proposed interview schedules.

Turning to the process of conducting the interviews, the setting for which the interview is conducted is highly significant and impacts upon the interviewees' willingness to describe and

give access to their life-worlds (Brinkman and Kvale 2015). All the face-to-face interviews were conducted in private meeting rooms at InsuranceCo's/ConstructionCo's offices. In advance of the face-to-face interviews, respondents were given the choice for the interview to be conducted off-site at a nearby café, but all stated they were comfortable and chose for the conversation to take place on site. Six interviews (all with interviewees employed by InsuranceCo) took place over the phone as it was more convenient for the respondents for the interview to be scheduled when they were working from home.

Prior to the commencement of each interview, an information sheet and consent form (see Appendices 11 and 12) were presented for participants to read and, if/when they were happy to proceed, sign the consent form. Both of these documents had also been emailed to the interviewees several days in advance of the interview taking place. The purpose and scope of the interview was explained within the information sheet provided, and this was also confirmed verbally with the interviewee before the interview began. All interviewees were happy for the conversation to be recorded, and this was checked prior to the interview commencing as well as asking if the interviewee had any questions. Only once the interviewee had confirmed they were happy for the interview to start was the recorder switched on. As each interview came to a close, checks were again made to determine whether the interviewee had any questions or points they would like to raise. This was done as a form of debrief to make sure participants had the opportunity to deal with or raise any issues they had been worrying about during the interview (Brinkman and Kvale 2015). Once this debrief had taken place, the dictaphone was switched off. After the dictaphone was switched off, interviewees were asked once more if they had any questions in case they had anything to raise that they had not wanted to be formally recorded.

As previously indicated in section 4.5.a, the interviews at InsuranceCo were conducted in stages, with planned breaks of several weeks to allow for transcription, initial data analysis and question refinement to take place (see section 4.6.b for more detail) as well as the recruitment of additional participants. Interviews at ConstructionCo were carried out over a two-week period and commenced after all of the interviews at InsuranceCo had taken place.

#### *4.6. Data analysis*

Next, the use of thematic analysis is considered. First, with the aim of highlighting the applicability of its use for this study, thematic analysis is introduced and comparisons made to other qualitative analysis approaches. Then, the process of carrying out thematic analysis by this research is presented.

#### 4.6.a. *Thematic analysis*

Blaxter et al. (1996, p.185) state that “analysis is about the search for an explanation and understanding, in the course of which concepts and themes are likely to be advanced and considered and developed.” Miles and Huberman (1994) break the act of data analysis down into three sub-processes: 1) data reduction, 2) data display, and 3) conclusion drawing and verification. They outline that due to the large amount of data collected through qualitative methods, data reduction needs to take place through coding and categorisation. Coding is the analytical act of reducing, rearranging and integrating collected data in order to form theory (Miles and Huberman 1994; Sekaran and Bougie 2013). Data display is the presentation of this reduced data in an organised and compressed manner, which allows for conclusion drawing (Miles and Huberman 1994). This final process is the essence of data analysis (Sekaran and Bougie 2013): it is at this stage whereby research questions are answered through explanations, patterns and relationships identified as themes within the data (Miles and Huberman 1994; Sekaran and Bougie 2013).

The steps outlined above should not be considered linear: initial conclusion drawing can feedback and influence data coding (Sekaran and Bougie 2013). Further, while these are considered the generic stages of qualitative analysis (Sekaran and Bougie 2013), a variety of more specific methods and analytical choices exist. The approach utilised by this research is that of thematic analysis. Thematic analysis is a relatively broad and flexible approach that identifies, analyses and reports themes within data (Braun and Clarke 2006). It allows for not only the rich description of a data set but also allows for interpretation of the research topic (Boyatzis 1998; Braun and Clarke 2006).

Other popular approaches to qualitative analysis include: content analysis, discourse analysis, interpretative phenomenological analysis (IPA), grounded theory and the Gioia method. However, none of these were considered to be as suited as thematic analysis to the aims, background and overall methodological strategy of this research. Some of these strategies for analysis are tied to specific philosophical or theoretical backgrounds that are then reflected in the aims of those approaches. For example, the underlying assumptions of content analysis have been linked to communication theory (Vaismoradi et al. 2013). It aims to describe the characteristics of text by considering who says what, to whom, and with what effect (Bloor and Wood 2006). Content analysis is better suited to research that would benefit from the possibility of the quantification of qualitative data, by measuring the frequency of different categories and themes. Such an approach risks missing the contextual understanding that is considered key to this case study

research. The assumptions and aims of discourse analysis, focused on the use of language to create meanings (Dick 2004), also makes it less suited to this research that is grounded in ideas of interpretative phenomenology. Whereas this study is interested in accessing individual's subjective experiences (of i-deals) *through* interview dialogue, it is less concerned with the specific use of language by those interviewees. In this regard, IPA - which as the name suggests is grounded in the assumptions of interpretative phenomenology - could have been a suitable approach for this research study. Not in conflict with the broad aims of this research, IPA was developed in order to examine how individuals make sense of their experiences (Millward 2006). However, the intense examination of individual interview transcripts required by IPA (Smith 2004) makes it unsuitable for a project of this scale - it is better suited to research with much smaller sample sizes (Smith and Osborn 2008). Although an adapted version may have been possible, one of the four defining features of IPA is that it is inductive in its approach (Smith 2004), making it unsuited to the abductive nature of this research project. Nevertheless, many of the aims of IPA remain relevant to this research - such as the exploration of individuals lived experiences and how they make sense of those experiences - and these have been incorporated into the flexible nature of thematic analysis. Finally, like IPA, the explicitly inductive approach of grounded theory and the Gioia approach (see Gioia et al. 2013) also makes these approaches unsuited to the abductive nature of this study.

In contrast to the above approaches, the flexible nature of thematic analysis makes it highly suited to the background and aims of this research project. Thematic analysis is not tied to a theoretical position and has been successfully utilised in line with numerous paradigms (Braun and Clarke 2006). Presuming a researcher's assumptions are made explicit, thematic analysis can successfully support research focused on exploring participants' experiences, meanings and realities (Braun and Clarke 2006). Braun and Clarke (2006) also claim that thematic analysis can be used by research adopting either inductive or deductive approaches, with the potential for codes to either emerge directly from the collected data or be influenced by existing theory. Although Braun and Clarke (2006) do not explicitly discuss the applicability of thematic analysis to abductive research, given that abduction combines both inductive and deductive elements, its suitability to this approach is clear. Furthermore, existing publications (e.g., Fereday and Muir-Cochrane 2006) have demonstrated the use of thematic analysis as an appropriate analytical method for research adopting a hybrid of deductive and inductive theorising. Overall, through the process outlined in the next section, thematic analysis is able to provide a rich, detailed and complex account of research data. It was highly suited to this study focused on understanding multiple stakeholders' experiences of the formation and functioning of i-deals. In line with the interpretative

phenomenological underpinnings and abductive approach of the study, thematic analysis was able to move analysis of the data beyond mere description of explicit themes to deeper interpretation considering underlying ideas and assumptions (Braun and Clarke 2006).

#### 4.6.b. *Thematic analysis process*

Having introduced thematic analysis and highlighted its suitability for this research project, the specific process of data analysis undertaken for this study will now be described. The process that was adopted is based on the six phases presented by Braun and Clarke (2006) and summarised in Table 4.1. The process is recursive and movement between phases – both forwards and backwards – is needed in order to be performed successfully (Braun and Clarke 2006). Given the abductive approach taken by this study (see section 4.2), analysis was not considered to be a process that only took place once data collection had been completed. The intertwined nature of data and theory in abductive research meant that possible theoretical explanations were considered long before data collection took place (Mantere and Ketokivi 2013; Tavory and Timmermans 2014) and influenced the content of the interview schedules. However, as the data collection process has already been detailed in section 4.5.b.ii, here the focus will be on the analytical process undertaken once data collection had commenced.

<b>Phase</b>	<b>Description of process</b>
<b>1. Familiarising yourself with your data</b>	Transcribing data, reading and re-reading the data, noting down initial ideas.
<b>2. Generating initial codes</b>	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.
<b>3. Searching for themes</b>	Collating codes into potential themes, gathering all data relevant to each potential theme.
<b>4. Reviewing themes</b>	Checking if the themes work in relation to the coded extracts and the entire data set, generating a thematic ‘map’ of the analysis.
<b>5. Defining and naming themes</b>	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.
<b>6. Producing the report</b>	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.

**Table 4.1. Braun and Clarke’s (2006, p.87) six phases of thematic analysis.**

Initially (before data collection had begun), the research was driven by three broad research questions focused on understanding employer (LM and HR), employee, and co-worker attitudes and experiences of i-deals. Experiences of i-deals of varying content (not just flexibility and financial dimensions) were initially within the scope of the project. Analysis of data relating to different research questions and different types of i-deal all took place in parallel. All interviews were recorded and transcribed verbatim by the researcher. The practical need to transcribe the verbal interview data acted as the first step of immersion in the data, required by phase 1 of thematic analysis (Braun and Clarke 2006). While time-consuming, transcribing is a highly successful method for familiarising yourself with and gaining a greater understanding of your data (Riessman 1993). Once the transcripts had been produced, they were read and re-read to search for meanings and patterns while making notes and marking down initial ideas (Braun and Clarke 2006). The acts of transcription, reading and making these initial notes took place as soon as possible after each interview to support the abductive process, allowing for early ideas and potential propositions to be included and considered by later interviews.

In the early stages of analysis, after the first set of interviews at InsuranceCo (see section 4.5.b.ii), the choice was made to refine the study's focus to exploring stakeholder experiences of financial and flexibility i-deals only. At this point in the data collection, only a very limited number of experiences of other types of arrangement had been discussed by interviewees. Every interviewee (at this stage and throughout the remainder of the data collection process) had either experience of a colleague (peer or LM) having a flexibility i-deal, they had their own flexibility i-deal, or both. The next most commonly discussed arrangements were financial i-deals. Although raised markedly less often than flexibility i-deals, rich data and specific patterns were already emerging related to individuals' experiences of these arrangements (discussed further below). As a qualitative exploratory study, the findings are not intended to reflect statistical generalisability and the implication is not that flexibility or financial i-deals occur more frequently or are more available than other types of i-deal. Instead, the choice to focus on these arrangements reflects the richest data being collected and the strongest themes emerging for these types of i-deal. As discussed in section 2.10, an analytical focus on stakeholder experiences of financial and flexibility i-deals allowed for the consideration of the role of timing (ex-post versus ex-ante) in the formation and functioning of i-deals. In contrast, other types of i-deal (such as task and developmental i-deals) require insider knowledge and tend to only be negotiated ex-post (Simosi et al. 2021). Furthermore, the (few) other arrangements that interviewees had described experiences of at this point in the data collection did not appear to satisfy the definition of i-deals presented by the extant literature. For example, the opportunity to individualise work tasks and



responsibilities was raised by a small number of respondents during the initial interviews. However, these examples most often appeared to reflect line management activity focused on identifying opportunities for subordinates to develop their skills and work on tasks that most interested them. It appeared that when these opportunities were available, they were presented to all individuals within that particular team (rather than LMs individually considering requests). Consequently, these arrangements were not deemed to meet the criteria to be considered an i-deal. Opportunities for individuals to access financial support from their employer to cover the cost of studying towards qualifications or attend training courses were also raised. Despite potential overlap with financial i-deals, the interviewees who discussed these arrangements appeared to perceive them separately as routes to career development (rather than as a financial benefit). However, these arrangements aligned to standard organisational policy at InsuranceCo that encouraged (or even specified) that individuals in certain roles undertake specific qualifications. For example, all employees on the graduate scheme at InsuranceCo were required to undertake the Level 3 Certificate in Insurance, the cost of which was covered by the organisation. Such arrangements did not constitute i-deals.

Focusing in on the data related to experiences of financial and flexibility i-deals, a number of ideas and patterns unexpectedly emerged after the initial interviews and during that first stage of analysis. I-deals described as either exclusively or widely available were apparent and a dichotomy in employee responses to i-deals (limited functional outcomes versus broad and behavioural responses) was emergent (see Figure 4.1 and 4.2). These “empirical surprises” (Tavory and Timmermans 2014, p.123) drew attention to divergent narratives within the i-deals literature (highlighted in section 2.4). Consequently, research questions one and two were refined to those presented in this thesis. Based on the early data and analysis, research question three is largely unchanged to its original (albeit broader) iteration. Slight refinement took place to directly consider how co-workers assess the fairness of i-deals, due to the early but strong emergence of co-worker’s considering the reason why flexibility i-deals were requested (see Figure 4.3a) and performance comparisons being made with employees with financial i-deals (see Figure 4.3b). Finally, initial analysis highlighted LMs as the recipients of flexibility i-deals. The need to fulfil their line management duties was a strong and recurring theme raised by interviewees with flexibility i-deals, as were subordinates’ experiences of their LM’s flexibility i-deals (see Figure 4.4a and 4.4b). Returning to the literature with this data in mind, it became apparent that flexibility i-deals held by LMs, and the impact of these arrangements on third-party experiences and attitudes had been largely overlooked by the literature. Research question four was therefore added as an emergent research question once data collection and analysis had begun (albeit at this early stage). Based

on all of these analytic refinements, prompts (and new questions in support of RQ4) were added to the interview schedules to interrogate the ideas further with the subsequent interviewees.

Following transcription and notetaking, the next stage of data analysis (phase 2) involved the generation of initial codes informed by the participants' language. This initial coding took place in parallel with the data collection process. A code represents a feature of the data that appears to be interesting (Braun and Clarke 2006) and is the very start of the process of organising the collected data into groups that allow for meaningful conclusions to be drawn (Sekaran and Bougie 2013). Reflective of this project's abductive approach, the production of codes (and later, themes) was both data-driven: reflective of interesting ideas within the collected data and allowing for unanticipated ideas to emerge, and theory-driven: based upon concepts and propositions from the existing literature (Braun and Clarke 2006). This coding was performed personally by working through the entire data set and labelling the raw data, assisted by the use of Nvivo11 (a specialist qualitative data analysis software package). Still in the early stages of analysis at this point, equal attention was given to each data item and coding for as many potentially interesting ideas and patterns as possible took place (ibid). Individual extracts of data were regularly attached to more than one code, and codes that appeared to provide tensions within the data were noted but honoured, reflecting the messy and at times conflicting nature of qualitative and case study research (Eisenhardt 1989; Eisenhardt and Graebner 2007).

Once data collection was complete, the initial codes were categorised into themes, as per phase 3 of thematic analysis (Braun and Clarke 2006). Like a code, a theme captures something important about the collected data but works at a higher level and represents either a patterned response or meaning (ibid). Although each theme occurred numerous times within the whole data set, prevalence in and of itself does not create a theme. Rather than being quantifiable, the relevance of a theme comes down to whether it captures something important in relation to the topic being explored (Braun and Clarke 2006). These themes were reviewed (phase 4) against the coded extracts and the entire data set. Some of the initial themes identified were discarded due to a lack of support and others were combined or amended to better represent the data set as a whole. Themes were then refined, defined and renamed so that they presented a clear story from the data (phase 5).

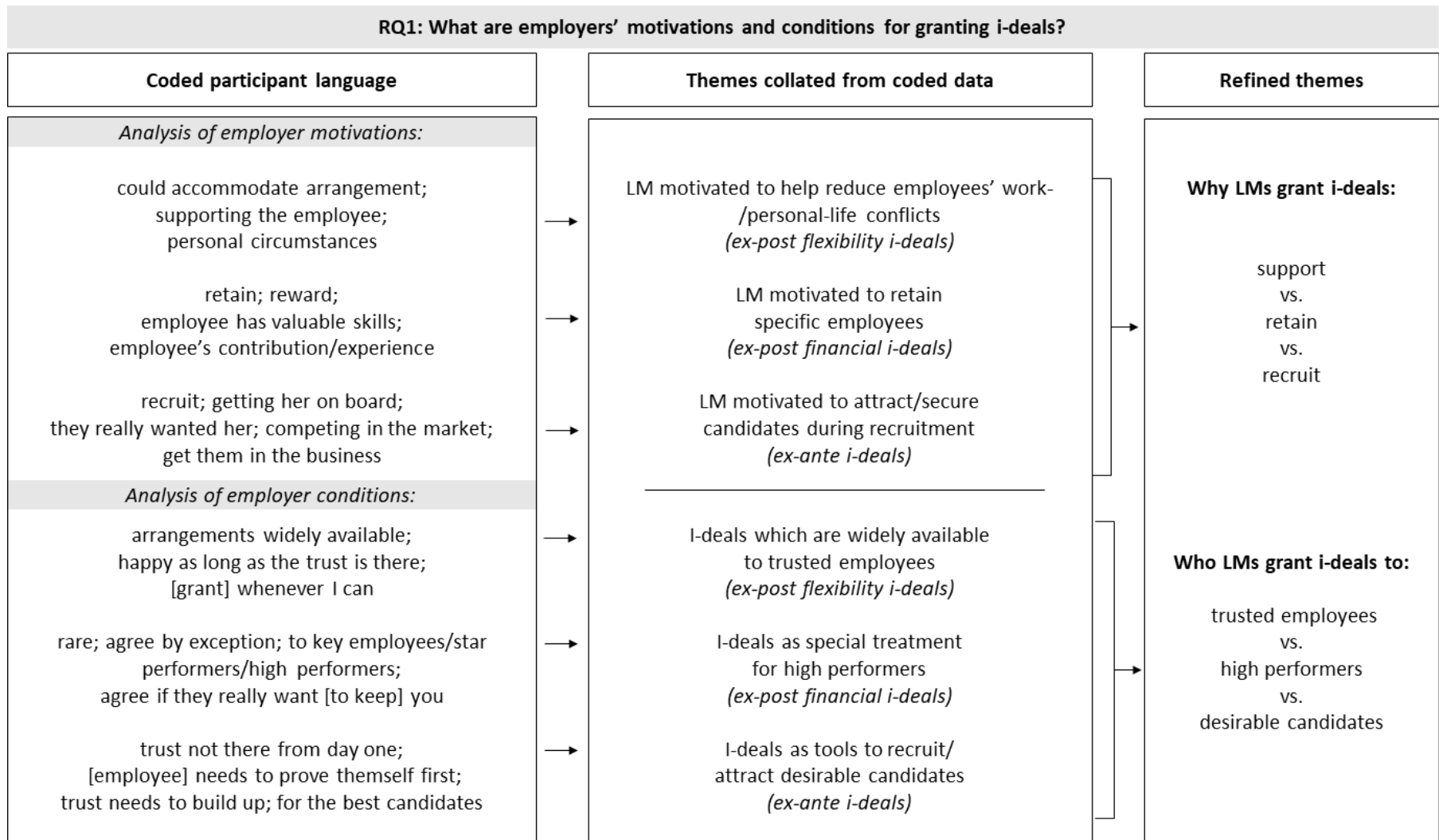
Figures 4.1, 4.2, 4.3a, 4.3b, 4.4a and 4.4b provide transparency on the development of the final coding structures of the research findings. They present examples of the participant responses that were coded (columns 1), aligned to the collated themes (columns 2), and were then refined (columns 3). Figures 4.1 and 4.2 present the final coding structures for the analysis of the findings

in response to research questions one and two respectively. These findings are elaborated in Chapter 6. For clarity of presentation, the analysis of the findings in response to research questions three and four are each presented over multiple figures. Figures 4.3a and 4.3b present the final coding structures for the analysis of the data in response to research question three: 4.3a focuses on the findings related to co-worker evaluations of flexibility i-deal fairness, and 4.3b on the data related to co-worker evaluations of financial i-deal fairness. These findings are elaborated in Chapter 8. Figures 4.4a and 4.4b present the final coding structures related to research question four. Figure 4.4a presents the coding structure for the data related to the perceived (dys)functionality of LM flexibility i-deals. Figure 4.4b presents the coding structure for the data highlighting the perceived (un)fairness of LM flexibility i-deals, as well as emergent data highlighting the challenges faced by LMs with flexibility i-deals. These findings are elaborated in Chapter 10.

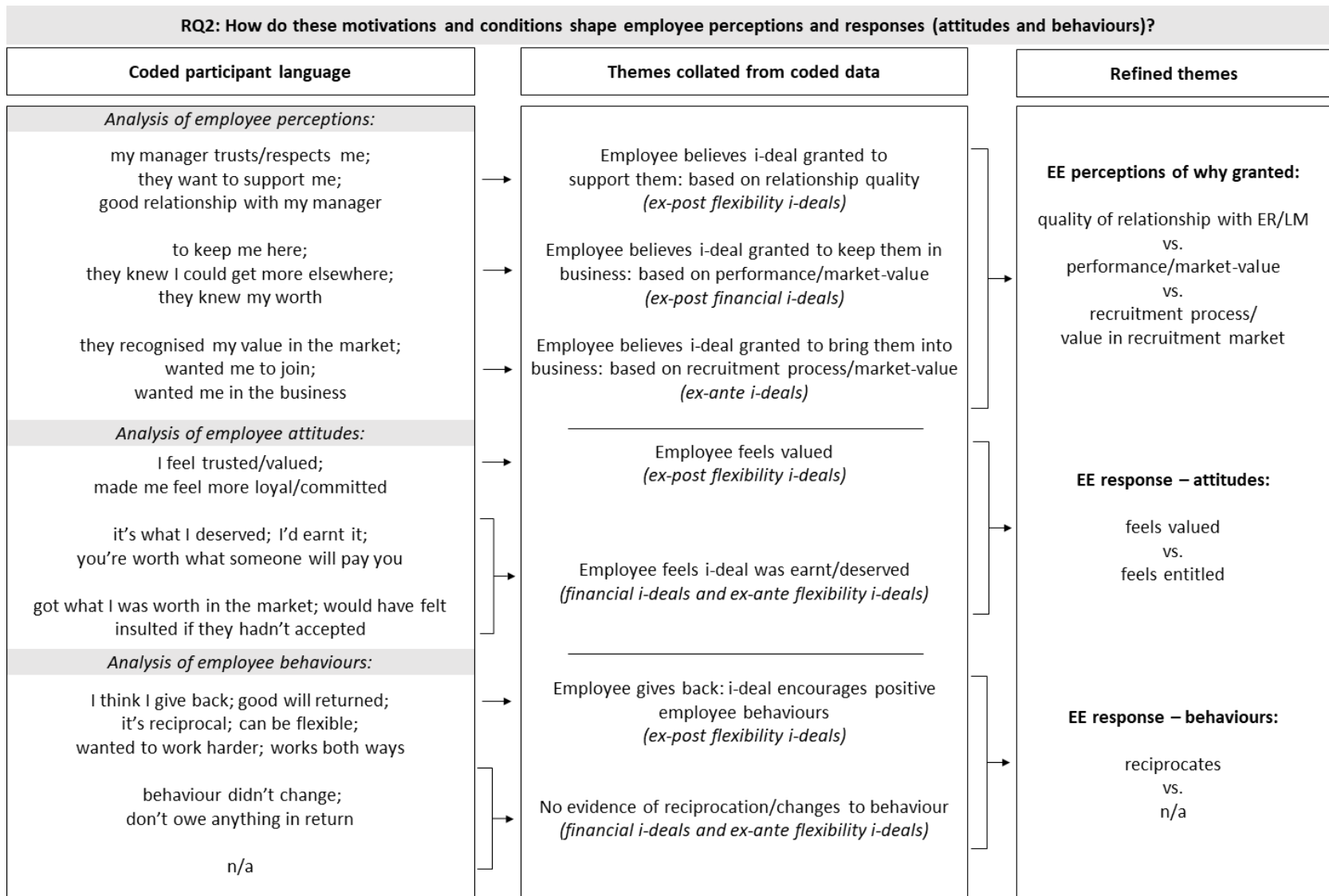
The final component of thematic analysis (phase 6) is the write up of the report. The write up needs to provide a compelling account of the story told by the data and provide sufficient evidence of the themes within the data (Braun and Clarke 2006). Space constraints preclude the inclusion of all of the relevant data supporting the themes discussed in the data chapters. Instead, following Booth (1961) and Golden-Biddle and Locke (1997), the data is *shown* and *told*. *Showing* the data is important for demonstrating the rigor of the data collection and analysis processes. In this thesis, showing the data is achieved through interview quotations provided in combination with contextual and interviewee information in the main body of text. These quotations and the relevant contextual information can be found in the empirical chapters (Chapters 5, 6, 8 and 10). The *telling* that takes place is what explains the data's significance to the reader, taking the analytic narrative beyond merely description to make an argument in the relation to experiences of the formation and functioning of i-deals. Some *telling* of the data takes place in the empirical chapters but continues more theoretically in the discussion chapters (Chapters 7, 9 and 11).

Throughout the data and discussion chapters, the findings are explored by research question (noting RQ1 and RQ2 have been grouped together) as opposed to broken down by case organisation. The themes to be presented in the empirical chapters were observed across both case organisations despite the differences in their size and sector, and individual findings are evidenced by quotations from either Insurance Co, ConstructionCo or both. Where differences were observed between organisations, this is made clear in the narrative text and illustrative quotes will be provided to demonstrate the variances. As an explorative, qualitative study, the selection of supporting quotations is not intended to demonstrate the prevalence of a theme in

one case organisation over the other, but as the clearest demonstration of the range of experiences and attitudes expressed across all of the interviewees. Throughout the data chapters, the findings are separately presented for experiences of flexibility and financial i-deals (except for Chapter 9 that focuses on flexibility i-deals exclusively) as research suggests that i-deal outcomes may differ by type (e.g., Liao et al. 2016). The findings are then synthesised at the end of each section/chapter.



**Figure 4.1. Final coding structure for RQ1 showing alignment of raw data to refined themes.**



**Figure 4.2. Final coding structure for RQ2 showing alignment of raw data to refined themes.**

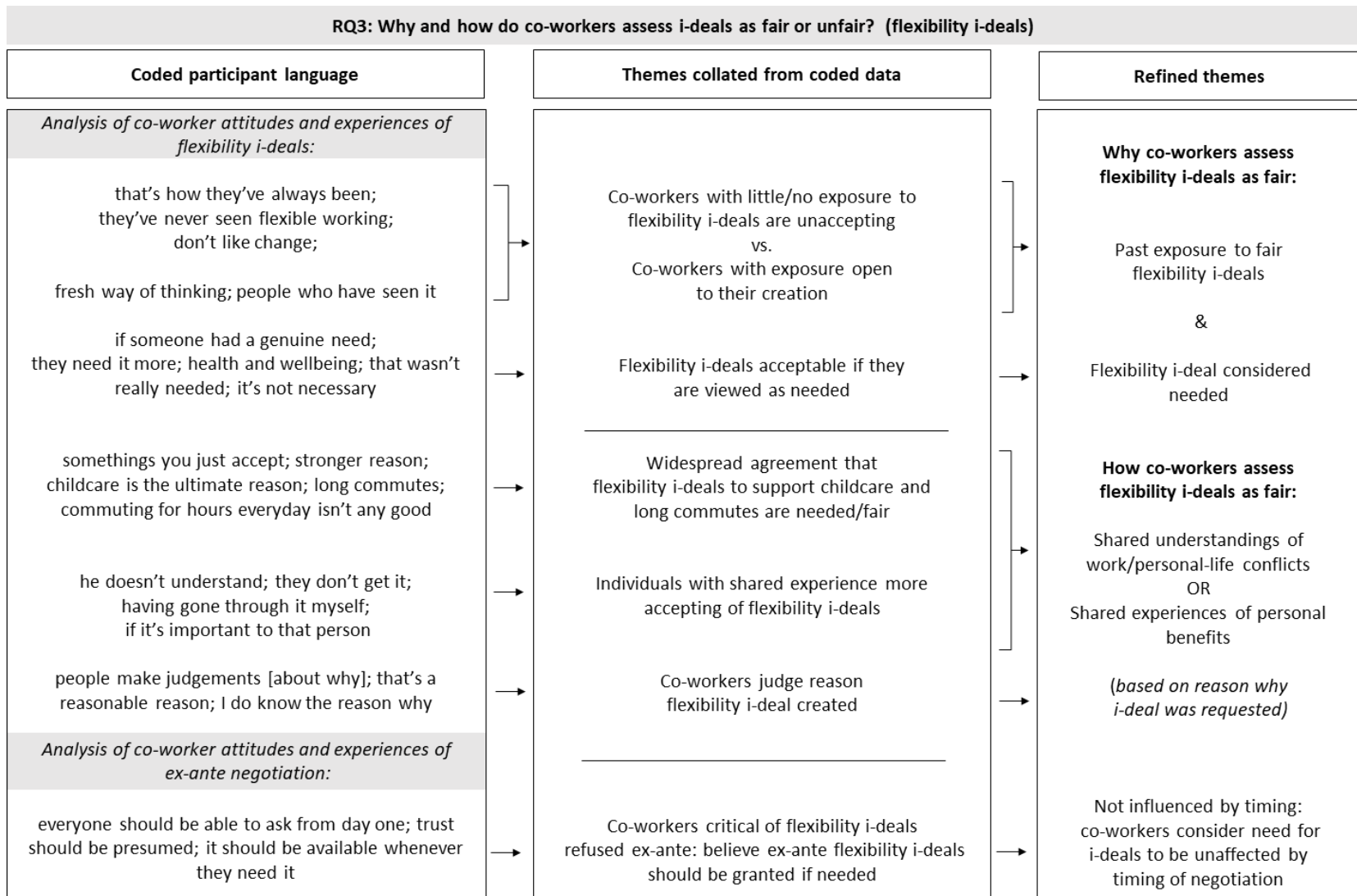


Figure 4.3a. Final coding structure for RQ3 showing alignment of raw data to refined themes (flexibility i-deals).

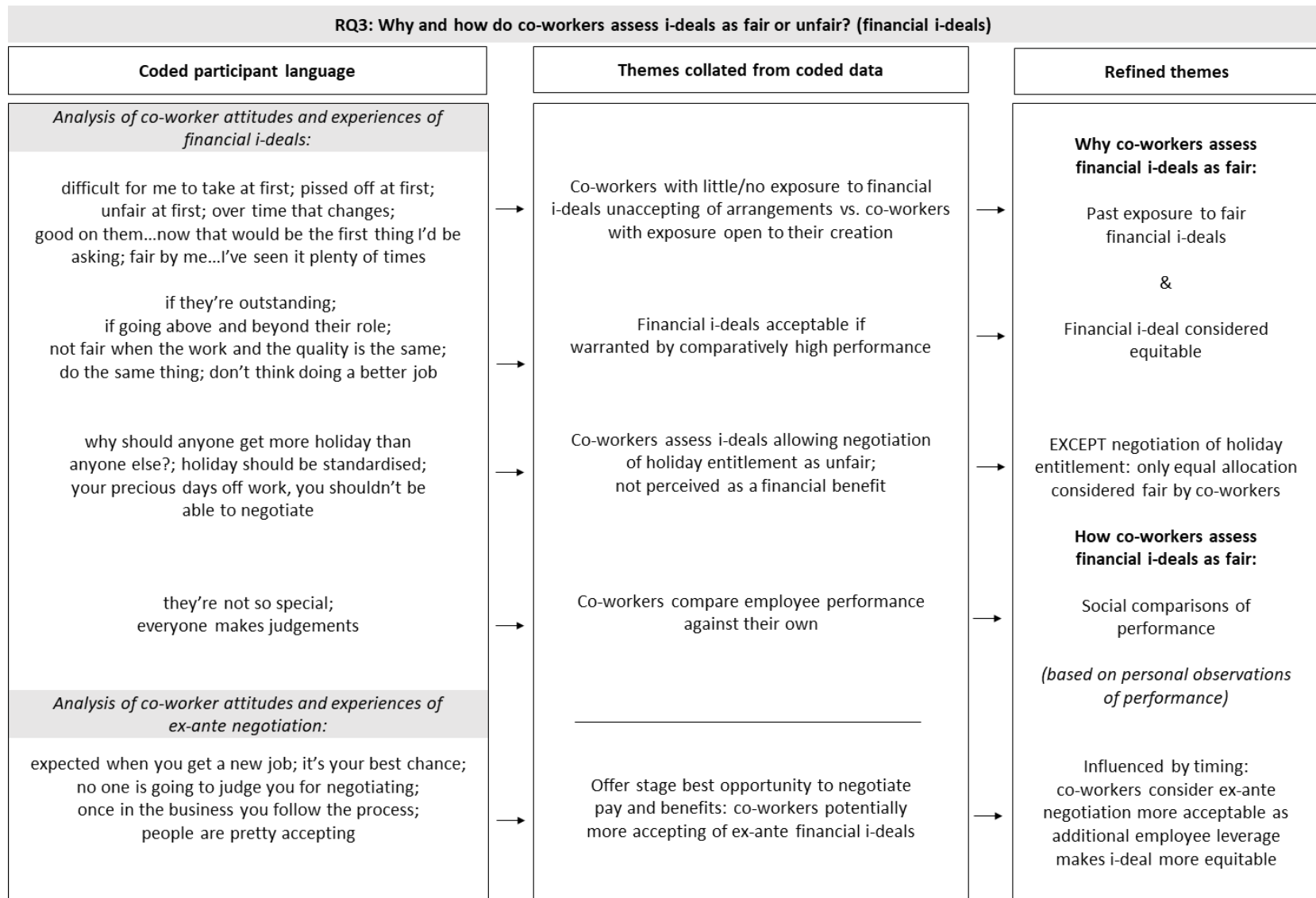
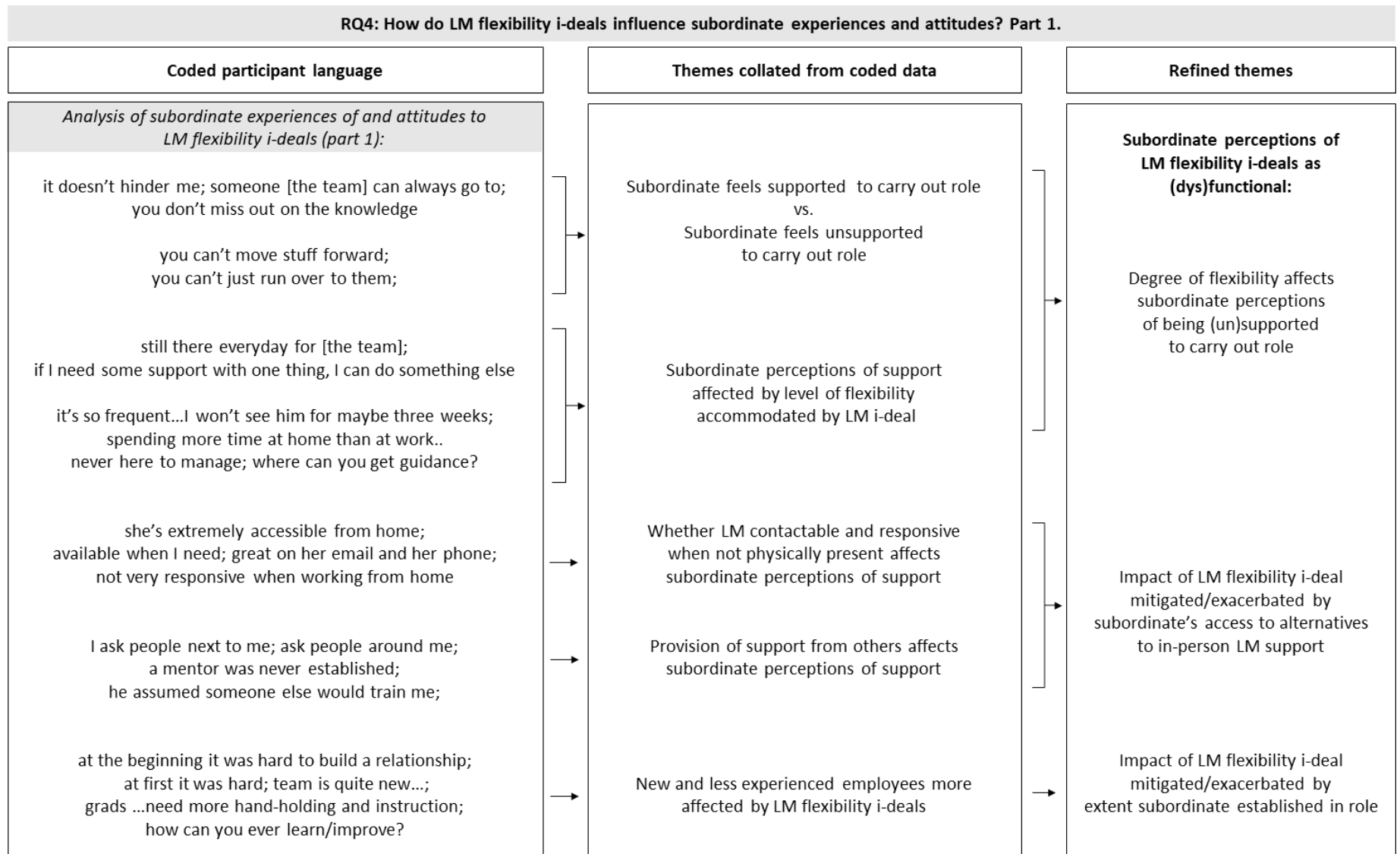
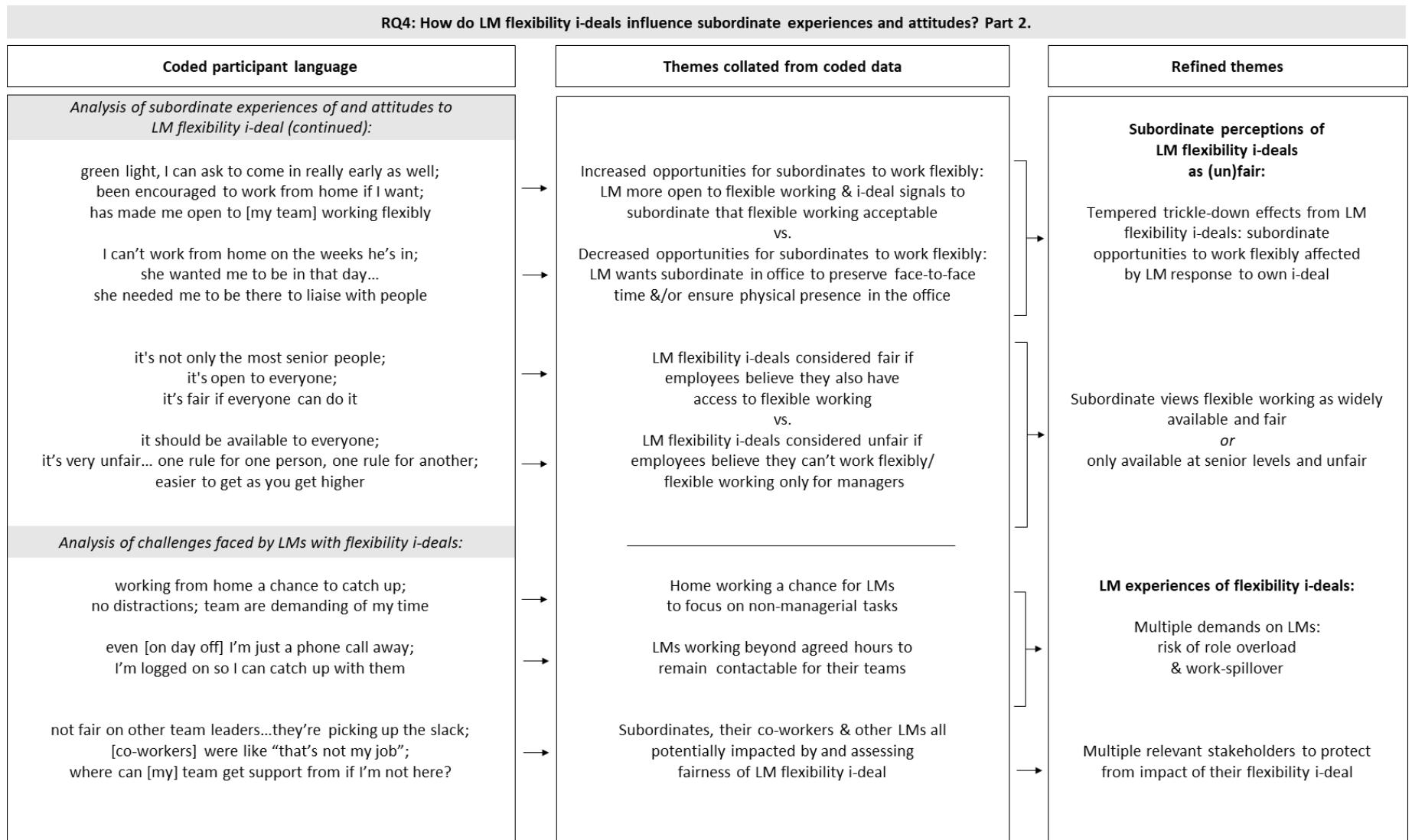


Figure 4.3b. Final coding structure for RQ3 showing alignment of raw data to refined themes (financial i-deals).





**Figure 4.4a. Final coding structure for RQ4 showing alignment of raw data to refined themes (1).**



**Figure 4.4b. Final coding structure for RQ4 showing alignment of raw data to refined themes (2).**

#### 4.7. *Methodological considerations*

Thus far, this chapter has outlined the methodological strategy undertaken by this research and worked to demonstrate its appropriateness for exploring multiple stakeholders' experiences of i-deals. It is also important to provide reassurance that the research is of high quality. For many, this equates to addressing any potential issues of "validity" and "reliability".

Validity considers whether an indicator really measures the concept it intends to (Bryman and Bell 2007, p.165). For this research, a potential validity issue arose from "idiosyncratic deal" being an unfamiliar term to the majority (if not all) interviewees. This presented the possibility that the interviewees did not understand the concept of i-deals as it is intended or defined by the literature. To try and mitigate against validity issues arising from this confusion, a clear definition and explanation of i-deals was provided to participants at the start of every interview. Plus, and as described in section 4.4, a clear conceptualisation of i-deals (considered within the context of each case) was determined. This allowed for distinguishing between i-deals and any other more normative arrangements described by interviewees during the data collection and analysis process. During the data collection process, if interviewees discussed arrangements that were identified as not being i-deals, the conversation was respectfully moved on. If arrangements that were discussed during the interviews were identified as not being i-deals during the data analysis process, the relevant dialogue was coded as such and not included in the subsequent themes.

While there are numerous forms of validity, discussions of external validity or "generalisability" are particularly common within academic literature. Questions of generalisability tend to consider whether research findings are applicable beyond the individuals and contexts that have been examined (Bryman and Bell 2007, p.42). These are concerns of statistical generalisability. Due to concerns regarding statistical generalisability, many – often positivists – dismiss case study research as an unimportant activity (Ackroyd and Karlsson 2014). Such discussions suggest that due to very few cases being representative of the generality and because it is not known which cases are representative, no case should be trusted as generalisable (Ackroyd and Karlsson 2014). However, this assessment of case studies is based on the logic behind non-deductive forms of reasoning (Ackroyd and Karlsson 2014). Simply because non-deductive research takes an interpretative leap and may not be considered logically "complete" (Mantere and Ketokivi 2013), does not mean that it is not a valuable and important scientific research activity. Like much qualitative and case study research, this study does not make any attempts to claim that the cases or samples of participants are statistically generalisable (Bryman and Bell 2007). Instead, the research aims to contribute to theorising related to the formation and functioning of i-deals.

Contribution to theory has been put forward as one of the key criteria for qualitative research quality (Pratt 2008). Case studies are not generalisable to populations but to theoretical propositions (Easton 2010): their aim is to expand and generalise theories (Easton 2010; Yin 2014). For this research, the themes derived from the data are intended to be considered in terms of the extent that they confirm, challenge or extend understanding and conceptualisation of multiple stakeholders' experiences of i-deals, in order to support the development of i-deal theory (Darke et al. 1998; Yin 2014).

Questions of reliability consider whether the results of a piece of research can be replicated (Bryman and Bell 2007). This understanding of reliability does not have a clear application within qualitative research (Armstrong et al. 1997). Qualitative research produces in-depth accounts of participants' experiences and attitudes (Collins et al. 2013), both of which are susceptible to change, making replication over time unlikely. The very act of being interviewed may lead individuals to reflect and change their views (Brinkman and Kvale 2015). This highlights why the criteria of validity and reliability may not be wholly relevant to this research. While these criteria are often presented as the signposts of "true scientific research" (Kvale 1995, p.20), they are founded upon positivist ideas and presume that a single and objective reality is accessible and measurable (Guba and Lincoln 1994; Bryman and Bell 2007; Järvensivu and Törnroos 2010). This research is underpinned by phenomenological beliefs that while a "real" world exists, it cannot be accessed objectively but only through subjective experiences. As such, positivist criteria of validity and reliability are not wholly applicable to this research. Thus, alternative criteria with greater relevance to qualitative research will be considered instead.

Guba and Lincoln (1994) state that rigour within qualitative research should be assessed by the extent to which it is trustworthy. They present four criteria for evaluating trustworthiness: credibility, transferability, dependability, and confirmability (Guba and Lincoln 1994; Bryman and Bell 2007). Credibility is suited to the claims of interpretative phenomenology that interpretation is always bounded by the experiences of both the participants and the researcher (Geanellos 2000). Multiple interpretations of an exploration mean that it is the credibility of an argument that is vital if it is to be accepted by others, rather than it representing one universal truth (Bryman and Bell 2007). Dependability is concerned with the consistency of the research process, as opposed to reliability that is focused on the consistency of the results (Bryman and Bell 2007). Confirmability relates to ensuring that the researcher has acted in good faith (Bryman and Bell 2007) and not, for example, overtly let their personal values or theoretical inclinations bias their investigation. Rather than suggesting that research findings should be generalisable to other

settings and entire populations, transferability encourages the presentation of an inquiry in a manner that allows the reader to make connections between the claims of a study and their own experiences (Bryman and Bell 2007).

In terms of establishing credibility, one of the techniques considered good practice is member checking (Bryman and Bell 2007; Baxter and Jack 2008). This is the process of the researcher sharing their conclusions with their participants to check that they have interpreted them correctly (Bryman and Bell 2007; Baxter and Jack 2008). Unfortunately, the time and access constraints of this project meant it was not possible to go back to the interviewees after full analysis of the data had taken place. However, transcribing and conducting the initial analysis during the data collection process allowed for the sharing and checking of these initial interpretations with the interviewees that followed. So as to avoid leading the respondents, this was achieved through exploratory questioning followed by explicit checking. Questions relevant to the initial interpretations of the collected data were presented to subsequent interviewees, and only once this questioning had taken place were those interpretations explicitly shared for checking with these individuals. The interviewees' responses to both the exploratory questioning and the explicit checks acted as the basis for evaluating the theoretical propositions that had been made. As such, not only did this help increase the credibility of the study, it was also in line with the abductive approach of the research.

The recommended approach for allowing the reader to appropriately consider the transferability, dependability and confirmability of a piece of research is to ensure "transparency" in the write up (Crowe et al. 2011). To achieve appropriate levels of transparency, detailed descriptions of all aspects of the investigation are included in the write up of this thesis (Stake 1995; Crowe et al. 2011). With regards to the methodology, the methods adopted, justification for these methods, the data collection process, and occasions where the methodological or analytical choices have changed or were influenced by practicality or ethical considerations are all detailed. In the write up of the research findings (Chapters 5, 6, 8 and 10), extracts from the raw data are provided in order to support the claims being made. This level of transparency serves to demonstrate the logic and plausibility of the conclusions drawn by the research, and that they reflect the realities of the participants (Annells 1996).

#### *4.8. Ethical considerations*

Considerations of ethics within any social science leads us to reflect upon the values (Bryman 2012) and moral principles of research (Sieber 1993). Researchers are encouraged to do whatever

possible to prevent harming others, to be respectful, and to be fair (ibid). This prompts the questions “how should we treat the people on whom we conduct research [and] are there activities in which we should or should not engage in our relations with them?” (Bryman 2012, p.135).

Specific discussions regarding ethical issues tend to revolve around four main areas: 1) harm, 2) informed consent, 3) deception, and 4) privacy and confidentiality of data (Diener and Crandall 1978; Punch 1998). Each of these issues will be discussed in relation to this specific research project in order to thoroughly review its ethical considerations. Additionally, it should be noted that before any data collection for the project was conducted it was necessary to apply for ethical approval through Cardiff Business School (see Appendix 13 for ethical approval confirmation letter). The changes to the data collection approach that occurred as a result of this process have been detailed throughout this chapter.

While there are varying positions regarding the extent to which ethical transgressions are ever permissible within social science research (Bryman 2012), most would consider research that is likely to cause harm to its participants unacceptable (Bryman 2012). To cause harm in this context extends but is not limited to: causing physical harm, harm to an individual’s development, a loss of self-esteem, increasing stress or upset, and prompting participants to engage in objectional behaviour (Bryman 2012).

Given that this research explored pre-existing experiences of work, the potential to cause harm was relatively limited. However, this does not mean one should not work to protect participants (Bryman 2012). It could be argued that there was potential for the data collection to draw participants’ attention to issues of unfairness associated with the use of i-deals, possibly inducing feelings of injustice and discontentment. However, the research was focused on determining employees’ existing attitudes and experiences of concepts they were already aware of and had formed opinions of. It was never the intention of this research to highlight any arrangements or potential issues of unfairness that the individuals were not previously aware of. The reasons for this were twofold:

- i) So as to not risk causing harm by highlighting arrangements that may have been viewed as unfair, potentially inducing feelings of discontentment (including discontentment towards other individuals employed at InsuranceCo or ConstructionCo).

- ii) The research is interested in understanding existing and naturally occurring attitudes towards i-deals within organisations. Highlighting previously unknown i-deals to an interviewee would have led to the collected data not being reflective of that individual's "life world".

Despite the above, the potential for harm to be caused by drawing attention to issues of unfairness associated with the use of i-deals was raised with the relevant gatekeepers at InsuranceCo and ConstructionCo in advance of data collection commencing. In advance of any interviews taking place, sources of support (e.g., LMs and employee support services) were identified in the event that any interviewees expressed or appeared distressed during the interviews (although upon completion of the data collection none of the interviewees had shown such signs of distress and the need to signpost to these sources of support had not materialised).

As highlighted in the preceding section, "idiosyncratic deal" is not a familiar or widely understood (as it is defined within the academic literature) term. This risked interviewees confusing i-deals with other arrangements. During the process of obtaining ethical approval for this research, a risk from this potential confusion was flagged by the ethics committee. Within the literature, i-deals are considered to be individualised management tools that (in theory) benefit or support not only the employee but also the employer. Research suggests that i-deals are also requested by employees to solve problems (e.g., Bal 2017) but these should not be confused with other personalised arrangements that do not meet the defining criteria of i-deals. An arrangement would not be classed as an i-deal unless it falls outside of standardised organisational policy and is agreed to because the employer sees it to be of strategic benefit to do so (e.g., due to the benefits they receive in return). This definition of an i-deal means that should a personalised arrangement result from a statutory employment right or reflect a reasonable adjustment under the Equality Act (Equality Act 2010) then it should not be classified as an i-deal. Schur et al. (2014) provide an example of this distinction being made within the literature with their comparison of i-deals and adjustments made for employees with disabilities. Consequently, it was not intended for conversations with interviewees to centre around any arrangements resulting from statutory employment rights or reasonable adjustments (e.g., for employees with disabilities).

Arrangements requested for other reasons (e.g., an amended work schedule to support caring responsibilities) were categorised as (flexibility) i-deals. In the UK, employees with 26 weeks of continuous service have the statutory right to apply for flexible working. However, employers are not obliged to grant these requests: requests for flexible working from eligible employees must be

considered by the employer, but can be declined as long as there is a “good business reason” to do so (The Flexible Working Regulations 2014).

Nevertheless, it was possible that this distinction between i-deals and, for example, reasonable adjustments may not have been clear to all interviewees. If this distinction was not clear to some interviewees there was a risk that they believe adjustments made in line with statutory employment rights are being described as “idiosyncratic”, which could cause offence or distress. In order to reduce this risk, a clear definition and explanation of i-deals was provided to participants at the start of every interview. Furthermore, as can be observed in the interview schedules (see Appendix 3, 4, 5 and 6) the term “idiosyncratic deals” was not used throughout the research interviews. In order to be transparent, the term was introduced and explained to participants at the start of the interview, but after this initial explanation the terms “individualised arrangements” or “personalised arrangements” were used as alternatives. As outlined in section 4.5.b.ii, this decision was in part made to increase the dynamic dimension of the interview questions. It also served to prevent a scenario where an arrangement resulting from a statutory employment right was mistakenly or without realising referred to as “idiosyncratic”. On two occasions interviewees started to discuss arrangements that did not appear to fall under the category of i-deals and may be considered reasonable adjustments. In preparation for this eventuality, questions seeking to understand how and why the individualised arrangement(s) had come about featured early on in the interviews (see Appendices 3, 4, 5 and 6). This allowed for the early identification of any arrangements being discussed by interviewees that were not i-deals but potentially related to statutory employment rights, so that the conversation could be quickly but sensitively moved on.

Bryman (2012) also raises the potential for participants to be harmed if they are identifiable. Within organisational research, should any collected data be attributable to the participants (either through the write up of the findings or due to insecure management and storage of collected data) there would be potential for harm to be caused. Such harm could occur through reputational damage to the interviewee or others, damage to individual working relationships, and/or the success of individuals within the organisation being negatively impacted. In this regard, the ethical precept to avoid causing harm is linked to considerations of privacy and confidentiality of data.

In order to prevent the above scenario and protect identities, the write up of this research uses pseudonyms rather than the real names of interviewees, any individuals they mention, and the participating organisations. Further, no real names or potential identifiers of individuals or



organisations were ever documented in the transcriptions of the interviews or any analytical notes made. In line with the self-censorship recommendations made by Adler and Alder (1993), some collected data was omitted from the research findings due to the potential for it to compromise specific individual's anonymity. For example, some described i-deals were considered so unique that the inclusion of data relating to individuals' experiences of those arrangements was believed to risk the interviewees being identified. In order to provide secure storage of the research data, all files containing data collected as part of the project (written and audio), are stored on Cardiff University's secure server, and have been encrypted and password protected. The audio recordings of the interviews will be permanently deleted one year after final submission of this thesis and subsequent publications.

The principle of informed consent concerns the provision of sufficient information to participants to make an informed decision regarding their involvement in the research (Bryman 2012). For this study, the gaining of informed consent was achieved through the use of an information sheet (see Appendix 11) and consent form (see Appendix 12) which explained the following to potential participants:

- the focus of the research,
- that participation was entirely voluntary,
- that they could decline to answer any questions should they wish,
- that they could end the interview at any time,
- that they could withdraw from the research at any time,
- that nothing they say could be traced back to them,
- how their data would be treated and stored,
- how their data would be used.

These documents were presented to participants once they had expressed interest in being involved in the research (by responding to the research advert) but prior to the interview being arranged. The participants were not required to sign the consent form at this stage: the information was provided to aid their decision as to whether or not they wanted to attend the interview. Prior to the commencement of any interviews, the information sheet and consent form were presented again for participants to read and, if were they happy to proceed, sign the consent form. No information was collected or recorded from the participant until consent had been gained. The provision of these documents also served to address any ethical concerns regarding deception as participants were honestly and transparently provided with information regarding the topic, aims and anticipated outputs of the study.

Having comprehensively outlined the methodological strategy of the research, the thesis will now move on to detail the study's findings.

## 5. Descriptive findings

The thesis now moves on to present the collected data and discuss the research findings. This chapter specifically presents descriptive findings to emerge from the collected data. These provide important context for the more substantive and analytical findings that are detailed throughout Chapters 6, 8 and 10 in response to the research questions. The presented data reveals (1) who grants i-deals within the case organisations, exploring the different roles of line managers (LMs) and HR representatives for financial and flexibility i-deals, and (2) the awareness of i-deals by different organisational stakeholders, including considerations of how visible the arrangements are to others.

### 5.1. *Who grants i-deals at InsuranceCo and ConstructionCo?*

Starting with who grants i-deals, differences emerged for financial and flexibility i-deals, and between the case organisations. In both InsuranceCo and ConstructionCo, LMs were authorising flexibility i-deals unilaterally. However, this was not the case for financial i-deals. At InsuranceCo, LMs received the initial requests for financial i-deals from employees but needed HR and senior management approval to agree to the arrangement. At ConstructionCo, senior managers often directly involved themselves in financial i-deal negotiations with employees and authorised the terms without consulting the HR team.

Looking first at flexibility i-deals, the findings revealed that in the majority of instances LMs were making the decisions as to whether or not to grant i-deal requests. They did not need to go to HR or a more senior manager for their permission:

*I only go to HR for any paperwork I might need, not for permission. They are relatively basic decisions so I'd expect to be able to make them myself. I have operational managers that report into me who make their own decisions as to whether they support it too.*

Richard: LM, InsuranceCo

*...she asked me, she just approached me. ...It was just a conversation between us. ...Arrangements around time, working hours, I think you can do between employee and manager. I'd expect it to be at a manager's discretion.*

Phillip: LM with a flexibility i-deal, InsuranceCo

Liv provided another example of granting an i-deal to one of her subordinates without consultation or approval from anybody else. Her description suggests she was happy to get HR consultation if needed but didn't see it as necessary for that particular arrangement:

*She came to me and it was just between her and I, and I was like "Look, let's see how it goes and if we feel the need to get HR involved then fine."*

Liv: LM with a flexibility i-deal, ConstructionCo

While LMs had the authority to grant flexibility i-deals without seeking further approval within both InsuranceCo and ConstructionCo, for financial i-deals differences between case organisations emerged. At InsuranceCo, LMs were not in a position to approve employee requests for financial i-deals as sign off was needed from HR and a member of the senior management team. Alexis, one of the HR Business Partners, explained the process:

*I try not to position it [to the managers I work with] as, you know, I don't want them to necessarily be seeking my approval, but also it's the partner thing: "let's have a sensible discussion, let's see where our heads are at, let me help you guide your thinking" because I need to support it to go and get sign off by the senior business partner, and it goes to the Executive Committee member, so a member of the board.*

Alexis: HR and LM, InsuranceCo

Malcolm, another HR Business Partner at InsuranceCo, also confirmed the need for HR to sign off on financial i-deals, specifically those related to pay, stating *"They physically won't be able to get it through payroll unless I sign it off."*

Because HR and senior managers were gatekeepers for financial i-deals at InsuranceCo, LMs were not in a position to grant the i-deals themselves but were acting as the first line of approval. If they were in support of the arrangement, these LMs had to become an advocate for the i-deal on behalf of the employee:

*...when someone comes to me and demonstrates they are worth more, asks for a wage increase, I am very happy to go and advocate for them. I can't guarantee they are going to get it but I will fight for them.*

Richard: LM, InsuranceCo

*Some of the guys [in my team] have come up to me and had conversations about feeling underpaid and I agree with them. The processes and pay bands are quite restrictive here and trying to get sign off for increases outside of those bands involves a whole load of red tape. It's not just something I can agree to. I've really tried to represent them and show they deserve it.*

Tim: LM with a flexibility i-deal, InsuranceCo

The highly formalised nature of HRM at InsuranceCo meant the approval of financial i-deals, which are exceptions to standardised HR policy and practice, could not be guaranteed even if LMs advocated for the arrangements. Consequently, LMs at InsuranceCo had to be careful not to overpromise the approval of financial i-deals in case it was rejected by the HR Business Partner or senior manager:

*There are instances with pay where [the line manager] would like to agree to that higher salary so they've had that conversation and then had to backtrack because having gone through the sign off process it's been highlighted that that's not necessarily the right thing from a banding, reward and consistency perspective. It's not the right thing to do. So, they've had to stomach it up and go back to the person.*

Malcolm: HR, InsuranceCo

At ConstructionCo the granting of financial i-deals worked differently. The smaller size of the organisation resulted in senior managers and board members being directly involved in pay and/or benefits negotiations with employees, especially when that employee was at middle management levels and above:

*I had the job offer on the Tuesday...I was minded to decline because the contract conditions weren't equal to what I'd had before. So, the manager I was talking to said "okay, we're very disappointed" and then ...Wednesday morning, 7 o'clock in the morning, the company owner was driving on his way to Switzerland and phoned me up from the car and we had a conversation for about half an hour, around those conditions and my concerns, and he was happy to move on most of the conditions, like compromising on the death in service benefit. ...So, the whole thing, it was just an informal discussion with him.*

Matthew: employee with a financial i-deal, ConstructionCo

Plus, while HR representatives at ConstructionCo were informed of financial i-deals in order to administer the relevant details, they were not able to push back against terms that had been agreed by the company leadership:

[The HR team] *always hear about it late, when the deals already been made. ...it upsets the consistency and our processes but they don't care, they don't listen to us.*

Verity: HR, ConstructionCo

In summary, the findings reveal that LMs at InsuranceCo and ConstructionCo are in a position to authorise flexibility i-deals independent of any further sign off from senior management or HR. However, for financial i-deals the authorisation process differed between the two case organisations. At InsuranceCo, LMs acted as a first line of approval for financial i-deals and, should they support the arrangement, became an advocate for the i-deal and would pitch the terms to the relevant gatekeepers (HR and senior management). If sign off from those gatekeepers was not obtained, the administration of the financial i-deal would not take place. In contrast, due to ConstructionCo being a significantly smaller organisation, the company leadership were able to (and often would) become directly involved in negotiations for financial i-deals with employees. HR would therefore be required to process the terms of these i-deals, but did not have the authority to deny or overturn these arrangements that had been made by the senior leaders.

## 5.2. Stakeholder awareness of i-deals

Next, descriptions are provided highlighting organisational members' awareness of different i-deals. Given that, as described in the preceding section, i-deal negotiations tend to take place either exclusively or initially between employees and their LMs, the awareness of stakeholders outside this relationship will be discussed, namely: 1) HR representatives, and 2) co-workers (including subordinates in the case of flexibility i-deals).

### 5.2.a. HR awareness of i-deals

As described above, the requirement for employee pay and benefits to be formalised and processed through HR means they are at least aware of (and at InsuranceCo also consulted on) the formation of financial i-deals. In contrast, it was determined that flexibility i-deals can be agreed between the employee and LM alone, so the informing of HR may not be guaranteed. The collected data confirmed, however, that some flexibility i-deals still needed to be processed by HR, ensuring these stakeholders' awareness:

*...this time I thought because she's taking unpaid leave, I thought I needed to [let HR know]. So, I spoke to [the HR manager] and once she had the dates I said "put them in my calendar, I just need to formalise it with him"*

Liv: LM with a flexibility i-deal, ConstructionCo

*The initial discussion was informal, just with my manager, and he then went away and he spoke to HR about it. Then it was fairly formal, ...he sent to me a formal letter. It made sense because I was essentially changing my contract. They had to work out the holiday entitlement and the salary part of it.*

Kim: employee with a flexibility i-deal, InsuranceCo

When flexibility i-deals led to changes in pay, for example because the employee is decreasing their hours, this required involvement from HR to process the change, ensuring their awareness. However, for flexibility i-deals that did not involve salary changes, HR awareness was not guaranteed. Consequently, differences emerged between the level of HR awareness of flexibility i-deals at ConstructionCo versus InsuranceCo. Plus, HR representatives at the different case organisations expressed different levels of desire to be informed of these arrangements.

Verity explained that the HR team at ConstructionCo might not be aware of certain flexibility i-deals and could sometimes find out about them long after they've been established:

*There's other stuff we've got going on we might not even know [about], like Laurie working from home one day a week. We didn't know about that until months and months and months afterwards, and I think the only reason [the HR manager] found out one of the Contract Managers does late starts, school runs, the reason he found that out was a meeting they were having in their little Contracts Managers' meeting and he attends, so he picked up on that.*

Verity: HR, ConstructionCo

She went onto explain that the LMs within the company didn't understand why they should inform HR of these i-deals, but she felt it was important that they were aware:

*We are like "you need to tell HR" and they are all "why do we need to tell HR that for?" I sort of see their point but you just need to know what's going on, don't you?*

Verity: HR, ConstructionCo

Peter, the HR Manager, also expressed frustration at not being aware of certain flexibility i-deals:

*Nobody came to me, as the HR manager, and said "Look, I've agreed this... just to let you know..." Why wouldn't you do that? Because [we all] talk on a regular basis throughout a working week and [they] never thought to mention that to me at any stage, it didn't even crop up in conversation. I think it was kept under the radar on purpose, I can only draw that conclusion, which annoys me.*

Peter: HR and LM, ConstructionCo

Jess also acknowledged that HR might not be aware of all of the arrangements that had been made around the business. While she believed HR should be informed, she also stated that it was the LM who was ultimately accountable for the success of the flexibility i-deal:

*I'd like to think that HR know, pretty much, what arrangements are going on... I definitely think HR should be involved and it can go on the database or something... so it's on their record somewhere rather than us being in the dark, but ultimately it's up to the line manager to manage and keep an eye on it.*

Jess: HR, ConstructionCo

The HR representatives' preference to be aware of all of the flexibility i-deals should be considered in the context of the relatively small size of ConstructionCo: it may be feasible for the HR team to be informed of each arrangement. At InsuranceCo that has around 50 times more employees, the position taken by HR was different. Malcolm, a HR Business Partner, suggested that he was happy for LMs to come to an agreement with their employees without his involvement, although did feel that most of the time he was being informed:

*I'd say, mostly, yeah, the managers come to me and it's a case of "I'm okay with it, are you okay with it?" ...They will often come for reassurance rather than for permission, that's kind of the relationship, but they don't need to do that. If they can come to that agreement between the individual and their line manager then that's fine.*

Malcolm: HR, InsuranceCo

Sophie even expressed frustration at the extent that LMs were engaging HR on these issues:



*On the whole the people managers do not have the confidence: very needy. No matter where they are or what level of seniority, they are very, very often coming to us: "What am I supposed to do? What am I supposed to say?" So, I would say that if people managers receive requests, they will definitely engage with HR in some way, whether it be the BP team, my team or HR services.*

Sophie: HR and LM, InsuranceCo

Alexis agreed that managers should be able to deal with requests for flexibility i-deals themselves, and that as a HR Business Partner she did not want to be made aware of the arrangements. She did however acknowledge that there was a role for other areas of HR (the advisory team) to be involved when LMs needed some guidance on forming flexibility i-deals:

*...as a business partner, I wouldn't want to be involved at all. A manager should be able to manage that themselves and then has the HR advisory [team] on the phone. That's the first port of call. ...there can be a legal element to flexible working so there's local HR Advisors who would step in to help manage any of the risk around that, but I would not want to know at all unless there was a really big problem, and then I should just be informed. It should have been exhausted through others before it got to me.*

Alexis: HR and LM, InsuranceCo

In summary, in both case organisations when flexibility i-deals led to changes in an employee's salary, the administration of these changes sat with HR, guaranteeing their awareness of the arrangement. When flexibility i-deals did not lead to changes to pay, HR awareness of the arrangements appeared to be dependent on the culture of the organisation and the attitudes and confidence levels of the LMs. Plus, differences emerged in HR representatives' desires and expectations to be informed of flexibility i-deals. At ConstructionCo, LMs weren't always informing the HR team of flexibility i-deals, against the preferences of the HR representatives. In contrast, at InsuranceCo, HR representatives did not necessarily expect or want to be informed of these arrangements, and it was suggested that some managers were consulting with HR more than was necessary.

The next section moves on to describe co-workers' awareness of i-deals at InsuranceCo and ConstructionCo.

### 5.2.b. *Third-party awareness of i-deals*

The findings highlight two main influences on third-party awareness of i-deals: 1) whether the arrangements are discussed or communicated, and 2) the extent that the arrangements are visible. Co-workers and subordinates at InsuranceCo and ConstructionCo were less likely to be aware of financial i-deals than flexibility i-deals because they are less visible to others and less likely to be discussed with or communicated to colleagues.

Flexibility i-deals were the type of i-deal most commonly raised by co-workers as examples of i-deals that they were aware of. Every respondent interviewed was aware of at least one flexibility i-deal within their workplace and numerous interviewees were aware of multiple co-workers with a flexibility i-deal. The existence of flexibility i-deals was often communicated to co-workers and subordinates due to the potential for the arrangement to impact on the work of others:

*Graham has in his calendar that he is dropping his daughter off at school two days a week so he'll be in late. It's in his calendar as "In late: dropping Cara to school" so it's quite transparent.*

Peter: HR and LM, ConstructionCo

*On my email signature I made sure that it says when I leave on Mondays and Wednesdays, just so they know. It says the hours that I'm there, too.*

Tamsyn: LM with a flexibility i-deal, InsuranceCo

Similarly, a number of departments at InsuranceCo were using strategies such as shared calendars and physical notice boards to communicate where and when people were working, and this was highlighting when people had flexibility i-deals:

*We have a shared team calendar... So, what we do is, if we need to go on annual leave, we block our own calendar and also go into this team calendar and put in your time away. You block the time off there as well just so people know. ...there are people who work from home and it's a set day, one day a week, every Wednesday for example. We've got two people in my department who do that. ... [We all] know it happens because it's on the board.*

Polly: employee with a financial i-deal, InsuranceCo

*We've got a board with Monday to Friday on it and everyone just puts where we are throughout the week because at times we have to go to a different office or are on annual leave. It just means you know where everyone is. So, for people who have regular arrangements like working from home, that will be on there.*

Cerys: co-worker, InsuranceCo

Furthermore, co-workers/subordinates noticed the physical absence of an employee from the workplace that can result from a flexibility i-deal. Peter and Polly both noted how third parties can pick up on flexibility i-deals, even if they haven't formally been told about their existence, by simply observing when colleagues are out of the office:

*...because Liv maybe wasn't available sometimes on those Fridays, that started to be picked up on by people... they realised something had been agreed.*

Peter: HR and LM, ConstructionCo

*We've had junior analysts come in long after arrangements have been made, and they're never formally told "so and so has this deal" but they can pretty quickly see for themselves that that person isn't in the office every Wednesday. They're going to put two and two together and figure out how that came about.*

Polly: employee with a financial i-deal, InsuranceCo

In comparison to flexibility i-deals, examples of financial i-deals were highlighted by third parties less frequently throughout the interviews. Unlike flexibility i-deals, financial i-deals are inherently less visible to third parties and are unlikely to be discovered through the observation of an employee's behaviour or routine. Elizabeth suspected but did not know with certainty that her colleague had a financial i-deal, and described the unusual scenario that made her aware of the possible arrangement:

*I think pay's interesting because it's just not spoken about. One of the guys on my team possibly gets paid a lot more than I do so I think he's maybe negotiated something. He was refreshing his online banking and it had like 19p in, and he was refreshing it on payday and when it came up I thought "damn, that's what you get paid a month?" It was crazy, and then that kind of sparked it. ...but that doesn't happen every day, people don't just have their online banking up.*

Elizabeth: co-worker, InsuranceCo

Of course, observing a co-worker's monthly pay on one occasion does not necessarily evidence a financial i-deal or even a higher salary: this could be the result of, for example, a payment in arrears or of expenses. However, Elizabeth is now left believing her colleague may have a financial i-deal and does not know for certain because, as she explains, pay is not a readily discussed topic. This theme was supported by the majority of interviewees employed at InsuranceCo, who described pay as *"one of those things that people don't talk about"* (Cassie: co-worker, InsuranceCo). Even though Daisy didn't have a financial i-deal, she explained that her and some of her colleagues had been specifically told not to talk about their pay while working in the call centre, because as employees on the graduate scheme they earned more than others in their team:

*We were told quite explicitly: "Do not mention what you get paid. Do not mention your pay level or your grade. Don't bring it up. If they bring it up, just, you know, move on."*

Daisy: co-worker, InsuranceCo

A consequence of the reduced visibility of financial i-deals, in combination with the culture at InsuranceCo to not discuss pay, was that co-workers were seemingly less aware of these arrangements. In fact, a small number of interviewees from InsuranceCo believed it would not be possible to negotiate a financial i-deal related to pay in any circumstances:

*There's no other variability, you can't ask for a pay rise. That would never even, not even come into it... I've never even heard of anybody discussing that at all.*

Amelia: co-worker, InsuranceCo

*We get the annual increase, based on your performance review, but that's it. You couldn't just ask for a pay rise. That doesn't happen.*

Kim: employee with a flexibility i-deal, InsuranceCo

At ConstructionCo the HR team believed that only they were aware of some of the financial i-deals that had been negotiated within the business:

*...one chap has five more days holiday than anybody else because he goes climbing at the weekends, and other than HR nobody else knows about it.*

Peter: HR and LM, ConstructionCo

*One guy wanted a specific car, a pick-up truck thing. You get a certain car for whatever band you're in and if you want a better one normally you have to pay, but this car was more expensive and he just got it... [The rest of the staff are] not supposed to know, and to be fair I don't think they do know, but it would only take one comment to upset the whole bloody cart.*

Jess: HR, ConstructionCo

In summary, the data suggests that co-workers are more likely to be aware of flexibility i-deals than financial i-deals as they are both more visible and more readily communicated to others.

The findings presented in this chapter describe relevant stakeholders' awareness of i-deals and/or their role in i-deal formation. These descriptive findings provide important context for answering the study's research questions, as gaining insight into the nature of different stakeholders' interactions with i-deals supports exploration and understanding of their experiences of and attitudes towards these arrangements. For example, in order to explore employer motivations and conditions for granting i-deals (RQ1, see findings in Chapter 6) it is necessary to understand the extent and nature of employer representatives' (LMs, HR and/or senior managers) involvement in considering and authorising i-deal requests. Equally, gaining insight into third parties' awareness of different i-deals within their organisation can support understanding of why and how co-workers assess them as fair (RQ3, see findings in Chapter 8), or subordinates' experiences of and attitudes towards LM (flexibility) i-deals (RQ4, see findings in Chapter 10).

Next, the thesis moves on to present the analytical findings of the research, starting with those in response to research questions one and two.

## 6. Findings - The giving and receiving of i-deals: feeling entitled versus valued

This chapter presents and explicates the findings in response to research questions one and two. These research questions consider employer motivations and conditions for granting i-deals, and how these subsequently influence employee perceptions and responses (both attitudinal and behavioural). Drawing comparisons between financial and flexibility i-deals, and i-deals formed ex-post and ex-ante, these findings outline why employees do and don't reciprocate for their i-deals. The findings highlight how employee responses are connected to their perceptions, specifically related to why their arrangement was granted following the negotiation process.

First, the chapter outlines the findings that revealed employer representatives' motivations and conditions for granting i-deals, looking at flexibility and then financial i-deals in turn. Then, the chapter explores employees' perceptions and responses to each type of i-deal.

### *6.1. Employer motivations and conditions for granting i-deals*

The first research question considered the motivations (why) and conditions (on what basis/to whom) underpinning i-deals being granted by employers. Overall, data collected from line managers (LMs) and HR representatives suggested that ex-ante (financial or flexibility) i-deals were granted to recruit desirable candidates, but the motivations and conditions for granting ex-post arrangements differ according to i-deal type. Ex-post financial i-deals were granted to retain high performing employees, whereas ex-post flexibility i-deals were granted to support a wider range of trusted employees.

#### *6.1.a. Why and on what basis flexibility i-deals are granted*

Employer motivations for granting flexibility i-deals differed when they were negotiated ex-post versus ex-ante. Starting with ex-post arrangements, LMs were attuned to the conflicts between the work and personal lives of their employees and were granting flexibility i-deals to support them:

*It's about recognising peoples' personal circumstances and I try and create an environment that's supportive of that, that's why I'm open to making these arrangements whenever I can.*

Jacob: LM and HR, InsuranceCo

*I want to support my people to do their jobs the best they can and that means acknowledging that people have constraints and things outside of work. So, it's helping them, supporting them but it also helps us as a business.*

Phillip: LM with a flexibility i-deal, InsuranceCo

Employee descriptions of why flexibility i-deals were granted reinforced the claims that these arrangements were used to support employees:

*My manager is, and I think a lot of the managers here would do it because they are too, just very much supportive of their staff. I did have, in a previous role I did before this [one], I had a similar-ish arrangement too, when my daughter was younger and she was at nursery and then, you know, nurseries rarely open earlier than eight or later than six, so somebody has to be there, and they were fine with that too. They just want to help you.*

Deborah: employee with a flexibility i-deal, InsuranceCo

*I genuinely think my manager is just very supportive, and just wanted to help me try and manage everything.*

Kim: employee with a flexibility i-deal, InsuranceCo

Flexibility i-deals being granted to support employees implies that these arrangements were not used to reward high performers but were available to employees more widely. The data collected in response to direct questioning on the availability of i-deals mostly supported this. When questioned as to whether flexibility i-deals were more available to high performing employees, only one interviewee felt that high performers might be afforded more flexibility. Plus, this respondent actually noted that they didn't think this increased flexibility would come in the form of a flexibility i-deal:

*There's definitely that element to it, but I don't think it's a case that they'd be more likely to get an arrangement granted to them. It's more that I think people who are perceived to be those superstars, and know they are perceived that way, would just generally get away with a great deal more in terms of flexible hours. They'd push the limits of what they can do before feeling like they need to ask for a specific arrangement: not everyone, but some.*

Peter: HR and LM, ConstructionCo

In contrast, most suggested that flexibility i-deals weren't used to reward high performance.

*No, to be fair I don't think it's used like that. Some of the arrangements around this place I think are a bit mad and not things I'd agree to, and on the other end of the scale some managers are just dead against agreeing to anything at all, but to be fair I don't think it's a case that the best employees are the ones who get to work from home or whatever.*

Verity: HR, ConstructionCo

Rachel also suggested that flexibility i-deals were available more widely within InsuranceCo than just to the highest performing employees:

*I think, honestly, people who are really high performers, there's not that many of them really, you are probably looking at the top 10, 15% of people: the people that it would cause like a massive problem if they left. I'm not one of those. I'm good at what I do but I'm not one of these massively outstanding, star performers, but I have an arrangement. I think those people, they will want to look after in many ways. They will look after them, probably more so financially... I think flexibility agreements are available much wider than that, almost to everyone, as long as the trust is there.*

Rachel: LM with a flexibility i-deal, InsuranceCo

Rachel felt (although she did not appear to have direct experience) that pay was more likely to be used as a way to "look after" high performing employees - an idea explored in more detail in the next section. She also believed that flexibility i-deals were available to employees companywide, except for a minority of individuals who were not trusted (yet). Other interviewees' responses support this claim. For example, one group of employees that some interviewees suggested flexibility i-deals were not available to were those who were under performing:

*If one of my team isn't performing then you try to monitor them a bit a more: that's the reality. I think the way it's positioned here is that flexible working is encouraged and part of the company, but you do have to earn it through trust. So, if you're not performing then you're not trusted in that environment and it would be harder to work from home.*

Oliver: LM with a flexibility i-deal, InsuranceCo



*The only time I would have a problem with one of my team working really flexibly was if they weren't delivering yet. So, if there were performance issues and you are failing and you weren't achieving these things on time, or the standard was low or whatever, then, yeah, I'd have a conversation about whether that was appropriate.*

Lynne: LM with a flexibility i-deal, InsuranceCo

For some managers, this concern also extended to developing or junior staff. For Gregory, this was because he was not sure he could trust his younger team members to work flexibly:

*We've got core hours and I'm quite strict with that really, and an element of that is probably due to their age, in honesty. I think you have to reach a level of maturity to be able to properly utilise a flexible arrangement without taking the mickey a bit... it's all about trust as well, I know, and some people you feel you can trust more than others I suppose, but if a task could take an hour or it could take four, and there's no real way of measuring or monitoring how long it takes, it's quite difficult then to let that go and let that become an out of sight task.*

Gregory: LM with a flexibility i-deal, ConstructionCo

The common theme in these descriptions was that some individuals were not trusted by their LM to work flexibly. Due to the requirement of trust, the findings suggest that flexibility i-deals may be less likely to be granted ex-ante. Some interviewees suggested that trust would not be in place for new recruits and that this acted as a barrier to agreeing to ex-ante flexibility i-deals:

*...from my perspective, if I suddenly had a new person coming in, I wouldn't agree that from day one "oh, you can work from home two days a week" because I want to see them do the job first and let that trust build up.*

Rachel: LM with a flexibility i-deal, InsuranceCo

*I think if you were interviewing a group of candidates and one comes and said [sic] "I want to work from home on a Monday" I think [the recruiting manager would] be a bit like "oh, I don't know what I think about that" and I sort of half see the point, because you don't know that person to trust from day one.*

Verity: HR, ConstructionCo

However, the suggestion that new recruits could not be trusted to have a flexibility i-deal was not universally agreed upon by LMs. Some stated it was important to trust employees from the moment you recruit them:

*I think you start off with an implicit trust relationship. I don't believe you have to earn it first, but you can lose it quickly. But I think that's an important element: that you implicitly trust somebody. If you've recruited them you have to work from that point first.*

Graham: LM with a flexibility i-deal, ConstructionCo

Examples of some ex-ante flexibility i-deals did emerge, but the motivation for granting these arrangements differed to those granted ex-post. Ex-ante flexibility i-deals were seen as “a good option to have when you're competing in the [recruitment] market” (Peter: HR and LM, ConstructionCo):

*Being able to agree to flexible working arrangements can help you attract the best and more diverse candidates.*

Malcom: HR, InsuranceCo

For example, Graham described an ex-ante flexibility i-deal he had agreed for one of his subordinates in order to compensate for the remuneration package on offer being less competitive than what she'd had with her past employer:

*It was part of the conversation that I had with [her] about how would this work for her because the rest of the package that she had wasn't necessarily quite as good as what she had in her previous role, but the flexibility was important to her. So, it was part of getting a, umm, a remuneration package which included that work-life balance. So, it enabled us to find the trade-off that worked for us all, for both of us. It was about getting her on board...*

Graham: LM with a flexibility i-deal, ConstructionCo

Verity, discussing the same i-deal, suggested that this particular employee was someone the senior management team were highly motivated to bring into the business:

*...she had those arrangements where she worked before and they really wanted her in, they knew her and thought "what's it going to take?" basically.*

Verity: HR, ConstructionCo

In addition to the motivations already outlined, a number of managers noted that they expected flexibility i-deals (ex-ante and ex-post) to help “*get the best out of your employees*” (Oliver, LM with a flexibility i-deal, InsuranceCo):

*I see that it's actually an opportunity for the business to support people. Invariably there's a cost, it takes people away from the office etc., but actually there's a tremendous amount of good will that you get back and relationships that get built with your employees that have a lot of spin-off benefits to the company.*

Ben: LM with a flexibility i-deal, ConstructionCo

This data suggests that managers may anticipate that employees will reciprocate for flexibility i-deals with positive attitudes and behaviours. The findings highlight that one specific form of reciprocation that some LMs want or expect when granting flexibility i-deals is the employee being flexible with their arrangement. For example, some managers expect their employees to, at times, adapt their agreed flexibility i-deal in line with the needs of the business. Liv commented that upon receiving a request for a flexibility i-deal, she would want to know that the individual would be able to adjust their schedule when it was required by the business:

*[When considering a request] I just probably want to know whether they can be flexible at all, because sometimes you might need to be in the office, so is there an opportunity for that?*

Liv: LM with a flexibility i-deal, ConstructionCo

Phillip explained how he occasionally asked one of his employees to start work earlier to attend meetings, despite having agreed that she can normally start half an hour later:

*I've got one person who gets in a bit later, so she works 9:30 to 5:30. That's absolutely fine, she came to me, we discussed it and I agreed to that: it's not a drastic change. But there are occasions when we might have a 9 o'clock meeting and I need to ask her to come in early.*

Phillip: LM with a flexibility i-deal, InsuranceCo

However, this expectation was not universally held by managers. Angie worried that her team member might think this behaviour was expected of her, when she didn't want this to be the case:

*Sometimes, I will ask Meg to do something, like if I really need something on a Friday, I'll say "can you do Friday morning?" and she often says yes, and I do wonder... if she's thinking "well, I do get flexible working, so I should." Well, no, because that's what we've agreed, so that's that. I don't want her to think like that.*

Angie: LM, InsuranceCo

In summary, flexibility i-deals made ex-post were granted by LMs in order to support employees, particularly trusted subordinates. Generally, trust was not presented as an exclusive criterion but as a characteristic of most LM-employee relationships. However, due to this condition of trust, some managers felt reluctant to grant flexibility i-deals to underperforming or new employees, or to use flexibility i-deals to support employees ex-ante. Instead, ex-ante flexibility i-deals were granted to recruit certain highly desirable candidates into the organisation. Despite these differences in the underlying motivations and conditions for granting the arrangements, what remained consistent between ex-ante and ex-post flexibility i-deals was that some managers anticipate that employees will reciprocate for their arrangements, in order to support the success of the business.

Next, the findings review employer motivations and conditions for granting financial i-deals.

#### *6.1.b. Why and on what basis financial i-deals are granted*

For financial i-deals, the findings revealed that in contrast to arrangements offering flexibility, motivations for granting ex-post and ex-ante i-deals were similar: to secure (recruit/retain) valuable employees. Starting with ex-post i-deals, Alexis, a HR Business partner at InsuranceCo, explained that ex-post financial i-deals focused on pay - what she referred to as a tactical pay increase - were rare, and most often used to retain employees. She provided an example of a financial i-deal that was agreed for an employee identified as "key" to the organisation:

*...it's company money, so we're pretty rigid, and when I say rigid, I mean it would be by exception that we had to agree to a tactical pay increase outside of pay review. They do happen and sometimes, probably more often, when trying to retain someone. ...For one person we did it, we identified them as key so we agreed to a tactical increase to their base pay, outside of pay review, but it is rare.*

Alexis: HR and LM, InsuranceCo

The collected data demonstrates the market-orientation of ex-post financial i-deals. Both employer and employee descriptions highlighted the use of threats to resign or alternative offers of employment as leverage to secure these arrangements.

*...people that approach you have perhaps been offered another job on higher money ...and if I don't agree with it, I'm not afraid to turn around and say no but I am more inclined to look into it.*

Richard: LM, InsuranceCo

*I've noticed that they are very reluctant to agree to people asking for pay rises and sometimes you've got to play the game and you say "right, can I have a pay rise?" and they are like "mmm, thing is..." and give all these excuses and then you have to be like "okay, thank you, there's my resignation letter" and then, if they really want you, they are like "ah, okay, about that pay rise" and it's that game.*

Charlie: employee with a flexibility i-deal, ConstructionCo

Charlie had observed that financial i-deals, especially those related to pay, weren't widely available but were being used to retain certain employees, and that individuals sometimes used this knowledge to force an agreement. Angie also noted that ex-post financial i-deals weren't available to most employees and that only those recognised by certain individuals within the organisation would be able to negotiate such an arrangement. She suggested that knowing this information put the majority of employees off requesting these i-deals:

*Most people are not going to bother asking. There's [sic] several layers of people that you need to get [approval from], so the only people that are going to go down that road are the [employees]... being looked after by certain people, you know? That's very controversial to say, but very true. The [requests] I've seen getting signed off, they are for those people that have been noticed by the people in the organisation that also happen to be the people who provide the sign off, you see? Otherwise, you wait till pay review, even if you're performing well, that option isn't for you.*

Angie: LM, InsuranceCo

In contrast to flexibility i-deals, there was no evidence to suggest that LMs were motivated to grant ex-post financial i-deals to support employees. In fact, one LM explicitly objected to granting financial i-deals for this reason:

*...on a couple of occasions people have asked because of lifestyle choices they've made and they need more money to support that and I am not as willing, well not willing at all, to accommodate that: that's not appropriate.*

Richard: LM, InsuranceCo

For ex-ante arrangements, interviewees suggested financial i-deals were granted in order to secure the recruitment of certain individuals into the business:

*It was the same for [the employee] who gets more annual leave days than others: that's what she wanted when she was recruited. The [senior manager] had worked with her previously: they really wanted her.*

Verity: HR, ConstructionCo

*We, [HR,] try to be consistent [with employee benefits] ...from their car, to the pension, to the healthcare and so on, including salary, holidays etc. However, there are a couple, a few, that they will give over and above to, to get them on board...*

Jess: HR, ConstructionCo

Once again, employee descriptions of why financial i-deals were granted ex-ante matched those of the employer representatives. For example, Matthew believed he was able to negotiate a financial i-deal when he joined ConstructionCo because the senior manager he negotiated with

had wanted him to join the organisation. He also noted that he didn't think he'd have been able to get the i-deal once he'd joined the organisation:

*He agreed because he wanted me in the business, I think he was keen to get me into the business. ...I think it would have been more difficult to push through once I was in. Before I started, I was in a position of strength really.*

Matthew: employee with a financial i-deal, ConstructionCo

Christian agreed that employers were happier to grant financial i-deal requests ex-ante than ex-post:

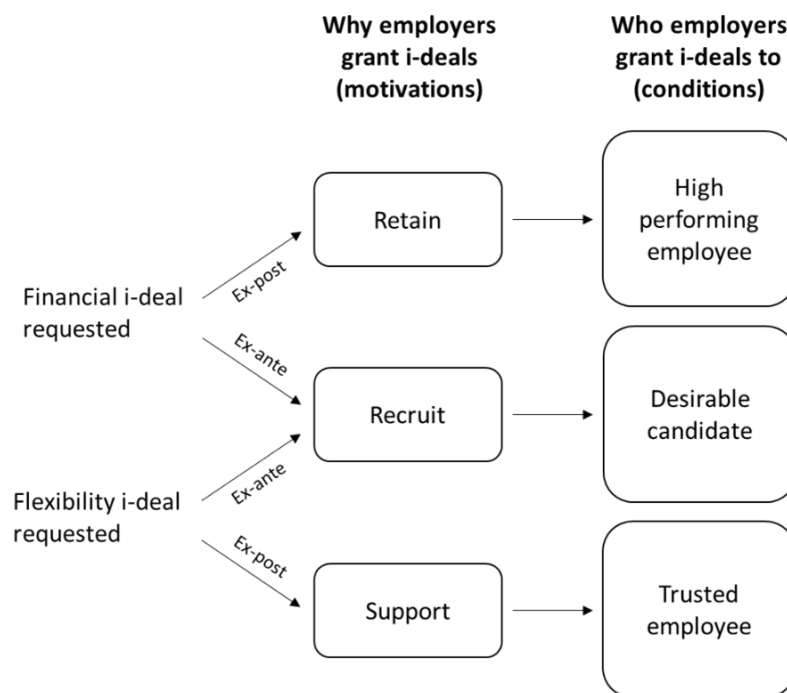
*Pay is an interesting one. I guess when you're being recruited your negotiating position is stronger because you could just walk away if you're not happy. But once you're in, you've signed up for certain terms and conditions and the expectation is that you stick to them. I think it's pretty difficult to negotiate pay here, I think they are more willing to do it before you enter the business.*

Christian: employee with a flexibility i-deal, InsuranceCo

The suggestion that it was more difficult to negotiate a financial i-deal once an employee had joined the organisation (ex-post) was also echoed by other interviewees representing the employer and employee perspective. These findings highlight the market-orientation of financial i-deals: made under conditions of leverage (particularly when negotiated ex-ante due to the influence of the recruitment market) rather than conditions of reciprocity or care. These arrangements therefore highlight the potential for internal inequity if an employee's external, market-value is more readily taken into account than internal contributions (actual performance and organisation-specific experience) when making decisions relating to employee pay and reward.

The findings suggest that employers grant financial i-deals to retain (ex-post) or recruit (ex-ante) employees. These i-deals were granted in recognition of an employee's market value to the organisation, under conditions where employees were high performers/desirable candidates or had market leverage. No evidence indicated that financial i-deals are granted to support employees, and they may even be denied under such circumstances. In contrast to the findings related to supportive flexibility i-deals, it appears that in order to recruit desirable candidates, managers may be more likely to grant financial i-deals ex-ante than ex-post due to the employee's market leverage.

Figure 6.1 summarises the findings thus far, providing an illustration of interviewee descriptions of why and to whom employers grant i-deals. Employers in both case organisations granted i-deals to recruit, retain and support employees. Financial i-deals were being granted in recognition of market value. Ex-post, they were used to retain high performing employees and were therefore being granted on an exclusive basis. When negotiation took place ex-ante, financial i-deals were granted in recognition of the employee’s skills and (anticipated) performance. The context and influence of the recruitment market increased the leverage of the employee negotiating, and the employer’s desire to secure candidates was described as increasing their willingness to grant financial i-deals, in comparison to when negotiation took place ex-post. Employer motivations and conditions for granting flexibility i-deals ex-ante were similar to financial i-deals: to recruit desirable candidates. However, differences emerged for ex-post flexibility i-deals as employers were granting these arrangements to support a much wider group of employees as long as conditions of trust were met. This condition appeared to act as a barrier to some (but not all) LMs granting ex-ante flexibility i-deals to support employees, because they did not yet have an established and trusting relationship with that new recruit.



**Figure 6.1. Why and to whom employers grant idiosyncratic deals.**

Next, the findings move on to consider employee responses to i-deals, and how these correspond to their perceptions of why their i-deal was granted.



## 6.2. *Employee perceptions and responses to i-deals*

Employee perceptions as to why their i-deal was granted were reported to impact their responses, and this emerged consistently across both case organisations. The findings suggest that employees perceive their ex-post flexibility i-deals to be indicative of a trusting, high-quality relationship with their employer. Consequently, these employees reported feeling valued and engaging in reciprocation through positive behaviours. However, employees reported limited positive responses (affective/attitudinal or behavioural) to ex-ante flexibility i-deals and financial i-deals. Findings suggest that employees believe these arrangements evidence their market value and leverage, reflected by their employer's efforts to secure them via recruitment (for ex-ante i-deals) or retention (ex-post financial i-deals). The result is that employees may feel entitled to these arrangements and under no obligation to make additional contributions in response.

### 6.2.a. *Employee responses to flexibility i-deals*

The findings revealed the ways that employees may or may not reciprocate for flexibility i-deals. Employees with ex-post flexibility i-deals provided examples of reciprocity such as adjusting their arrangements and agreed work schedules in accordance with business need.

Many of those interviewed with ex-post flexibility i-deals were keen to point out their willingness to be flexible with the arrangement that had been negotiated. Ben, whose ex-post flexibility i-deal allowed him to come into work later than normal office hours, was willing to come in early when necessary:

*Obviously, if there's meetings or something arranged, then obviously you make that effort to be in at that time, that's fine, it's not a problem. Every now and again I can come in earlier.*

Ben: LM with a flexibility i-deal, ConstructionCo

Liv also explained how she makes it clear to people that she is willing to be flexible with the day she normally works from home:

*I say to people "I work from home on a Friday, but I'm completely flexible." If I need to come into a meeting, I'll come in. As long as I know ahead that I need to come in, that's fine, and even sometimes it's been dropped on me last minute and it's "oh, you need to attend this" then it's fine, it's no problem.*

Liv: LM with a flexibility i-deal, ConstructionCo

Ben and Liv both described the negotiation of their flexibility i-deal as informal, and that it wasn't "written down or anything like that" (Ben, LM with a flexibility i-deal, ConstructionCo):

*Was it ever formalised or put in writing?*

*No. If I wanted to have that conversation and say "right okay, let's formalise something" then I would do that, but for now it's fine.*

Liv: LM with a flexibility i-deal, ConstructionCo

However, examples of employees being willing to adjust their flexibility i-deal were also provided by people who had arrangements that were recorded via formal contractual changes. For example, Tim explained that when he'd negotiated his i-deal he'd "had to fill out a form for my line manager to review... I got a letter back confirming it. ...It was all quite formal." Yet, he still suggested that he was prepared to work outside the terms of his i-deal in order to support business needs:

*At the moment I am having quite a lot of meetings as well so that means I'm engaged with the business a bit more at the moment and I need to be here. I'm not always taking my days at home, but I don't mind doing that.*

Tim: LM with a flexibility i-deal, InsuranceCo

Whether the arrangement had been formalised or not, these employees were willing to occasionally adapt their flexibility i-deal terms because they perceived their arrangement as reciprocal:

*So, 9 times out of 10 I do my work from home, but the odd day a meeting will come up, or something will happen with a client or on site and it's fine: I'll go, it's not a problem. Because they are so flexible with me, I am happy to be flexible with them.*

Liv: LM with a flexibility i-deal, ConstructionCo

*When I asked him about it, I said to my manager "Obviously it's flexible. If you need me on the Friday, I'm available." You know, it works both ways.*

Phillip: LM with a flexibility i-deal, InsuranceCo

These employees were responding in kind: they were willing to be flexible and supportive with their schedule because the business had allowed them flexibility and been supportive of them.

However, for these employees with ex-post flexibility i-deals, this theme of reciprocity extended beyond just being flexible with the terms of their i-deal, to more generally working extra hours in order to complete certain work outputs or meet deadlines. Georgina, who works condensed hours, noted:

*I've got to probably log on tonight and do bits and pieces, but that's really how that flexibility works for me. For me, I think it's very two way. ...They've been so flexible and accommodating with me, allowed me to make my job work around my life, so it makes me more loyal and want to work harder for them.*

Georgina: employee with a flexibility i-deal, InsuranceCo

Laurie and Rebecca expressed similar sentiments:

*Once they agreed to [the i-deal] my attitude became "if they are willing to do this for me then I can stay an extra hour or I can attend that event on a Saturday" you know what I mean? Working outside of my working hours or outside of my job description, I wouldn't have a problem with doing that because it works both ways.*

Laurie: employee with a flexibility i-deal, ConstructionCo

*It just makes you feel great, and if anything, it motivates me more because I know that my manager has been so accommodating and kind, I'm happier to go the extra mile, so those odd days where I work extra hours, it's not as much as a chore, because I think they've been accommodating to me or they've given me some allowances.*

Rebecca: employee with a flexibility i-deal, InsuranceCo

These findings suggest that employees may perceive the granting of their ex-post flexibility i-deals as discretionary acts, or favours, for which they are willing to reciprocate. Further, these acts of employee reciprocation corresponded with employee explanations that their flexibility i-deal being granted “*makes [them] feel valued*” (Rachel: LM with a flexibility i-deal, InsuranceCo):

*[My boss has] agreed to an arrangement twice now and that does, she does, make me feel valued, she's a good boss.*

Laurie: employee with a flexibility i-deal, ConstructionCo

Employees believed their i-deal reflected the quality of their relationship with their employer (or specifically their LM, commonly seen as representing their employer):

*They are really supportive with it and I think I give back. I do feel like I've got respect off my line manager, that we've got a good working relationship, but that's all true whether or not only I have it or lots of people have it. ...I think it's more about having that fairness across the board, rather than having that special treatment, because it's not a nice environment to work in if someone is like "well, how come she's gets a day off to do a course and I don't?", that's a bit of a petty environment.*

Charlie: employee with a flexibility i-deal, ConstructionCo

Charlie also distinguishes between her arrangement and special treatment, suggesting there could be downsides to having a more exclusive arrangement. A number of interviewees, employees and employer representatives, distinguished between arrangements that made employees feel valued versus those akin to special treatment. Like Charlie, they stated that they would not like to be in receipt of an i-deal offered exclusively rather than widely available, as this would make the arrangement unfair.

*...you don't really want to feel like you're special because you get this or you get to work from home one day a week, because that feels unfair. If everyone does it and you feel valued then that's fine...*

Verity: HR, ConstructionCo

At ConstructionCo, where in comparison to InsuranceCo normative approaches to flexible working were very limited (see section 4.4), some interviewees even suggested that they would prefer it if their arrangement was supported by organisational policy (potentially no longer making it an i-deal at all). These employees believed this would make them feel less guilty or would mean their arrangement was more accepted by others:

*I'd be more comfortable if it was something that I could, you know, back up with a formal policy. If there was a formal policy, I'd feel less guilty then.*

Gregory: LM with a flexibility i-deal, ConstructionCo

*I think it would be viewed more positively as almost standard practice to allow everyone that flexibility. I think if it was viewed as standard practice it would be more of a positive, because there would be more understanding from others...*

Samuel: employee with a flexibility i-deal, ConstructionCo

There was less discussion of employee responses to flexibility i-deals granted ex-ante. Nevertheless, the few interviewees who had negotiated ex-ante flexibility i-deals did not provide any descriptions of positively changing their behaviour in response to their arrangement, nor suggested that they were inclined to do so. Indeed, one employee explicitly described their reluctance to adjust the arrangement that she had negotiated prior to her employment commencing, presenting a more transactional view:

*...There have been a few occasions where ...I get something put on me that's huge, at like half 4, I'll just be like, "no, I've had all day of asking for work and nothing to do, you know this is my time to go home now, I'm going to have to do it in the morning".*

Helen: employee with a flexibility i-deal, InsuranceCo

This suggests that, unlike flexibility i-deals granted ex-post that were perceived as discretionary, employees may feel more entitled to terms negotiated via ex-ante flexibility i-deals, and that they therefore do not feel compelled to reciprocate.

In summary, the findings demonstrate how some employees with ex-post flexibility i-deals are reciprocating for their arrangement by - at times - being flexible with their agreed work schedule, and/or working above and beyond their contracted hours to meet certain outputs and deadlines. The findings suggest that this reciprocity occurs due to employees feeling valued and believing their i-deal reflects the quality of their relationship with their employer/LM. In contrast, employee responses to ex-ante flexibility i-deals were more transactional, although functional: they joined the organisation (as the arrangements intended) but did not necessarily change their behaviour.

Next, the chapter moves on to examine how employees respond to financial i-deals.

#### *6.2.b. Employee responses to financial i-deals*

Similar to ex-ante flexibility i-deals, employees with financial i-deals (ex-ante or ex-post), reported limited attitudinal or behaviour changes in response to their arrangement being granted. The findings revealed that employees believed their financial i-deal reflected their existing

contribution to the organisation, or (in the case of ex-ante arrangements) the norms of the recruitment process. Consequently, employees felt entitled to the terms of their financial i-deal and did not believe they needed to change their behaviour or reciprocate.

One interviewee, Matthew, explicitly stated that he did not think his ex-ante financial i-deal (related to both pay and benefits) had led him to change his behaviour, and that he hadn't felt the need to reciprocate for the arrangement:

*I always want to prove my worth, that's just how I am so I don't think the agreement impacted on that. I don't think they are related. ...The deal I was able to negotiate, that was about recognising my value in the market. It's appropriate compensation so I don't really think I owe anything specific in return.*

Matthew: employee with a financial i-deal, ConstructionCo

Matthew believed that his i-deal reflected his value in the recruitment market and that he was therefore entitled to those terms, demonstrating how the timing and resources involved in i-deal negotiation can impact upon the meaning employees attribute to their arrangement.

Two other interviewees discussed their attitudes in response to negotiating an ex-ante financial i-deal. Like Matthew, Simon believed the terms he had negotiated reflected his worth, having felt unhappy with the initial offer that had been made to him:

*I felt like the first offer was not great, and I told them that. If they hadn't increased it, I'd have found it a bit insulting.*

Simon: employee with a financial i-deal, InsuranceCo

In contrast, Polly felt that the negotiation of her ex-ante financial i-deal reflected the norms of the recruitment process:

*...I didn't feel like it was much of a reflection on me. I remember phoning my Mum up afterwards and she was saying "Polly, that's fantastic, they must really want you" but I just felt like it's what everyone does when they get offered a job. Maybe they even offer you a little bit less in anticipation that you will negotiate.*

Polly: employee with a financial i-deal, InsuranceCo

Although these employees' perceptions of why their ex-ante financial i-deals were granted differ, none of them considered it a reflection of a high-quality relationship with their employer (as was the case for flexibility i-deals which led to acts of reciprocation). The same is true for the data related to employees with ex-post financial i-deals. Two interviewees described responses to ex-post financial i-deals. Their descriptions suggest that employees with such arrangements perceive them in transactional ways, believing they reflect their market worth to the organisation and leaving them feeling entitled to the i-deal:

*I know someone here who actually gets paid a bit above the pay band they're supposed to be in, he managed to get that quite recently and I think if other people knew they'd be pissed off and see it as unfair, but what he said to me about it, which actually I think is a good point, is that the way he sees it is that it's the pay band that's wrong because if he could go elsewhere and get that wage then really that is what he's worth. You're worth what someone will pay you.*

Rob: co-worker, InsuranceCo

Despite i-deals, by definition, falling outside of standardised policy or procedure, Rob's description suggests that employees with financial i-deals believe they reflect their existing value or contributions to the organisation. Will even explained that the relationship with his employer was damaged upon negotiating an ex-post financial i-deal because it led him to believe that if he had not asked for the increase, the company wouldn't have appropriately compensated him for his contribution:

*...that has shown me that this company isn't going to give me the best offering. They're thinking of themselves unless I've taken the initiative and done all that work just to get what I deserve.*

Will: employee with a financial i-deal, InsuranceCo

This description highlights that because the financial i-deal was seen by the employee to reflect their existing contribution, negotiating such an arrangement not only failed to lead to employee reciprocation but even led to negative employee attitudes. Despite having not yet requested a financial i-deal, Charlie's comments supported this:

*I've got respect for them for allowing me to do the course and have the day release to do it. Whether I've got respect for them after the course depends on whether I get a little pay rise that I will be asking for. Because that's my overall aim, to get more money, and I think that doing a qualification would entitle me, I'd like to think, that's my opinion, to a better wage. I'll be bringing more knowledge to the business. I would like to think at the end of this they will agree to that pay rise because if they didn't then I would be looking elsewhere.*

Charlie: employee with a flexibility i-deal, ConstructionCo

Charlie explained that when she has completed her studies, she believes she will be entitled to a pay increase and will be requesting a financial i-deal. She suggested that if this financial i-deal is not authorised she will be looking for a job elsewhere, as the denial of her request would demonstrate that her employer isn't recognising her contribution.

In summary, employee perceptions as to why their financial i-deals were granted informs transactional responses to these arrangements. When negotiated ex-ante, employees believed their financial i-deal had been granted based on the context of their negotiation: either due to their value in the candidate market or due to the norms of the recruitment process. When negotiated ex-post, employees perceived their financial i-deals to reflect their market leverage/worth to the organisation. In neither scenario did employees view their financial i-deal as an indicator of the quality of their relationship with their employer. Rather the i-deal was perceived as reflecting their market value, leaving the employees feeling entitled to the terms they had negotiated.

Figure 6.2 extends upon 6.1 to incorporate the findings from this section. It summarises interviewees' descriptions relating to employee perceptions of why i-deals are granted and their responses to these.



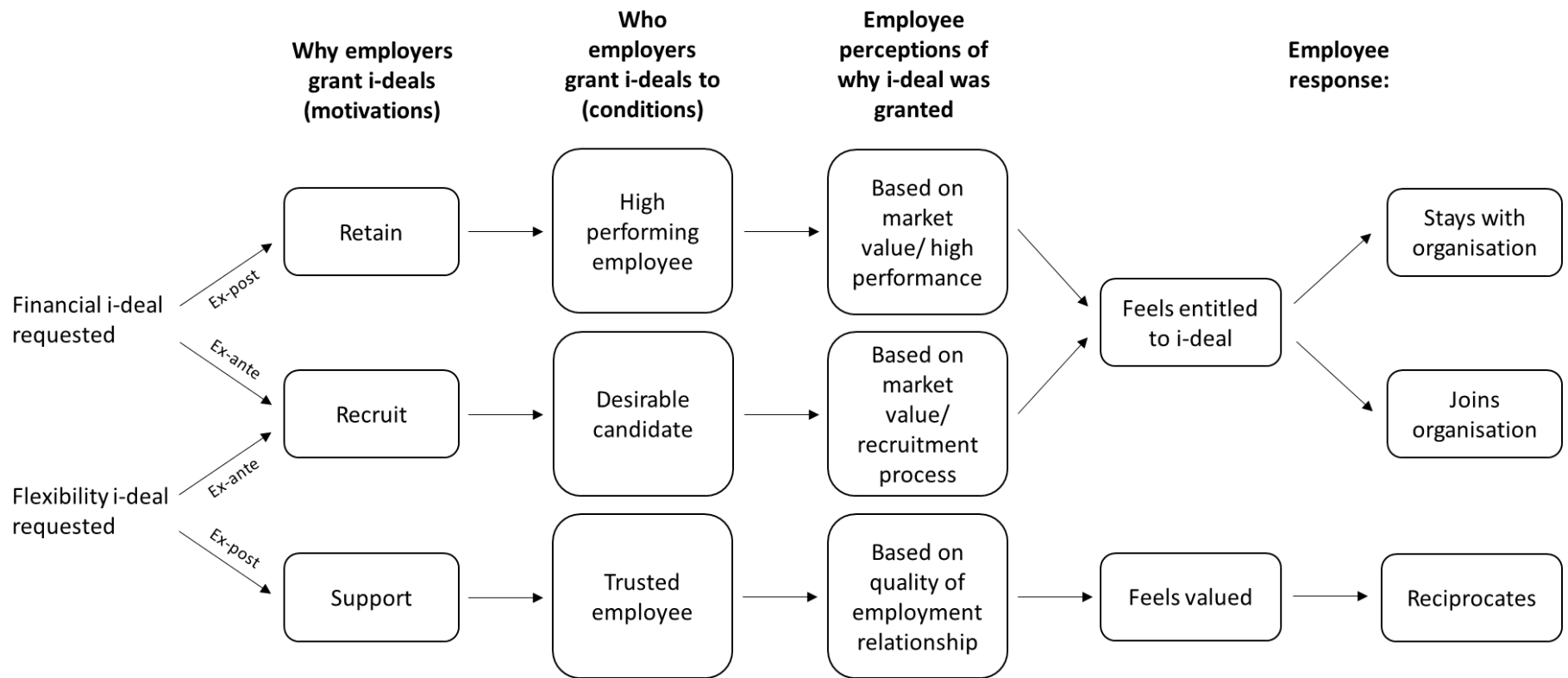


Figure 6.2. Employer motivations and conditions for granting i-deals, and employees' perceptions and responses.

### 6.3. *Summary of findings*

The findings highlight that employer motivations and conditions for granting i-deals differed based on the content and timing of the arrangements. Financial i-deals were granted in recognition of market value: they were used ex-post as exclusive arrangements to retain high performing employees, and ex-ante they were granted in recognition of the employee's skills and (anticipated) performance. The increased leverage afforded to employees negotiating ex-ante was described as increasing an employer's willingness to grant financial i-deals in comparison to when requested ex-post. Employer motivations and conditions for granting flexibility i-deals ex-ante were similar to financial i-deals: to recruit desirable candidates. However, ex-post flexibility i-deals were granted to support a much wider group of trusted employees. In contrast to financial i-deals, ex-ante negotiation was described as acting as a barrier to some LMs granting supportive flexibility i-deals as these are based on high quality, trusting relationships. Further, the findings demonstrate how employee perceptions of why their i-deal was granted may have implications for their responses. Employees can feel entitled to their i-deal when they believe it was granted in reflection of their high performance and market value. In these scenarios, the i-deal can achieve its intended functional goal to recruit or retain that individual, but may not lead to broader relational responses (that the employer may also anticipate). In contrast, when employees believe their i-deal was granted based on the quality of their relationship with their employer, leaving them feeling valued (rather than entitled), they reciprocate with positive behaviours.

In the next chapter, these findings are developed theoretically and considered in line with our understanding from the existing literature exploring i-deals and relevant theoretical approaches.

## **7. Discussion - The implications of market-based versus supportive i-deal pathways**

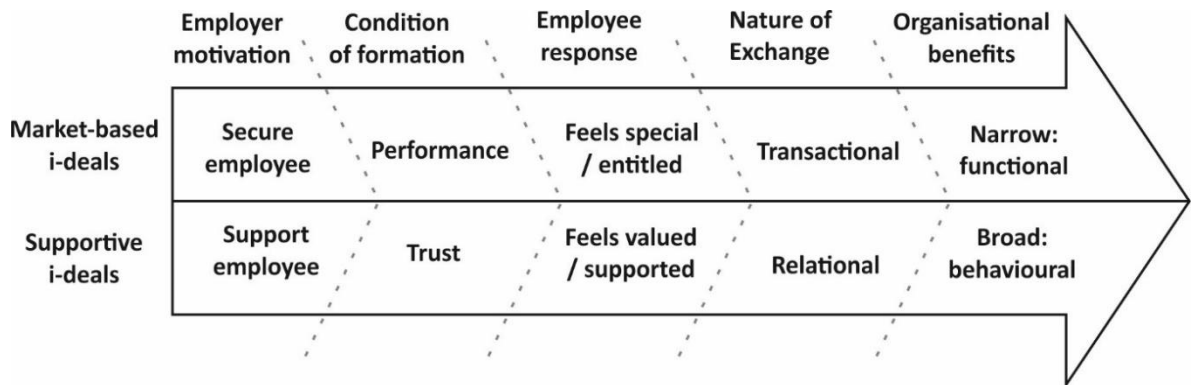
The findings in response to research questions one and two reveal why and to whom employers grant i-deals, and concomitant employee perceptions and responses. Collecting qualitative data from multiple relevant stakeholders has enhanced understanding of the alignment between different employer motivations and conditions for granting (and declining) i-deals, and employee responses.

While some research examines i-deals accessible by only high performing employees (e.g., Guerrero et al. 2014), this research provides support for claims that i-deals can be available more widely (Rousseau 2001; Rousseau et al. 2006; Hornung et al. 2010; Hornung, Glaser and Rousseau 2011; Bal 2017), and that this can be beneficial to organisations. This research distinguishes between i-deals that are “market-based”: offered exclusively in line with equity principles, and “supportive”: distributed more broadly on the basis of need. Furthermore, despite the claims within the existing literature that i-deals can be widely available, thus far it has not been clear how these more encompassing arrangements lead to positive employee responses and organisational outcomes. This research demonstrates that employee perceptions of why their i-deal was granted influence their responses. When employees feel entitled to the special treatment afforded to them through exclusive, market-based i-deals it can lead to transactional responses (tit for tat), whereas feeling valued in response to broadly distributed, supportive i-deals may lead to relational responses (broader resource exchange).

To demonstrate these claims, this chapter will first put forward a conceptual model based on theoretical abstraction of the findings outlined in the preceding chapter. Figure 7.1 summarises two pathways through which transactional, functional benefits and relational, behavioural benefits of i-deals are theorised to arise for organisations. The chapter will then, in turn, present more thorough discussions of each of the theoretical dimensions of the findings. This second section of the chapter starts by considering employers’ motivations and conditions for granting i-deals, and how these correspond to distributive justice allocation principles. Here, the manner in which the research findings contribute to our understanding of why line managers (LMs) might reject i-deal requests is also highlighted. Subsequently, the economic/transactional versus social/relational nature of market-based versus supportive i-deals and their outcomes for organisations are examined. Next, the influence of the content: the nature of the resources

offered by the arrangements, and then timing of i-deals on both employers' granting of and employees' responses to i-deals are considered. Throughout the chapter, the implications of the findings for future research are presented, and the practical implications and limitations are summarised before the chapter concludes with a summary of its contributions.

7.1. *I-deal pathways: market-based versus supportive i-deals*



**Figure 7.1. Theoretical model of market-based and supportive i-deal pathways.**

Based on the research findings, financial i-deals and ex-ante flexibility i-deals tend to be market-based in nature. Employers authorise market-based i-deals on the basis of equity. They are motivated to grant these i-deals to secure (recruit or retain) employees in recognition of, and specifically on the condition of, an employee's market value, often represented by high performance (existing or anticipated). Market-based i-deals are leveraged through power. Underpinned by transactional exchange, employees respond with feelings of entitlement to the special treatment they perceive themselves to have received. The model proposes that these market-based i-deals have specific, functional benefits to organisations, such as recruitment and retention. In contrast, ex-post flexibility i-deals were found to be supportive in nature. Supportive i-deals are granted on a needs basis and, consequently, offer the customisation of employment terms but are available to a wider range of employees. Despite their wider availability, supportive i-deals continue to meet the defining characteristics of i-deals: they are bargained for individually, resulting in individualised terms that differ from those offered to other employees (Rousseau et al. 2006; Ho and Kong 2015; Liao et al. 2016). Employers are motivated to provide these i-deals to support employees on the basis of employment relationships grounded in trust, as is key to such relational exchanges. The model proposes that employees feel valued and reciprocate as a result. As such, supportive i-deals are proposed to have broader behavioural benefits that extend beyond the functional outcomes of market-based i-deals.

## 7.2. *Employer motivations and conditions for granting i-deals: equity versus need*

Moving on to explore each component of the theoretical model in more detail, employers' motivations and conditions for granting market-based versus supportive i-deals are now examined.

As the name suggests, supportive i-deals are granted to support employees who are trusted by their LM. Trust is presented as a less exclusive condition upon which i-deals are granted. Thus, supportive i-deals are examples of i-deals that are available more widely, as has been suggested by Rousseau (2005), Rousseau et al. (2006) and Hornung et al. (2010). As the findings indicate these i-deals are used to help employees resolve conflicts between their work and personal lives, it appears the arrangements are allocated against the distributive justice principle of need. This understanding of why LMs grant flexibility i-deals aligns to the suggestion by Hornung et al. (2009) that these arrangements are possible routes to enhancing work-life balance. It also aligns to the considerate and pro-social components of LMs' granting of flexibility i-deals indicated by Hornung, Rousseau et al. (2011) and Taser et al. (2021) respectively. As broadly distributed arrangements, supportive i-deals offer potential as HR practices that can be both individually responsive and also consistently implemented: a combination that has positive implications for job performance (Fu et al. 2020).

On the other hand, market-based i-deals are granted to secure (recruit or retain) high performing employees. I-deals of this nature, and the "stars" or "high performers" they are available to, are the arrangements and employees Bal (2017, p.17) claims have been the primary focus within the i-deals literature to date. These findings support claims by Guerrero et al. (2014) that high performing employees are in a privileged position to bargain for i-deals, but also adds clarity to this claim by specifying that this is the case for market-based and not supportive i-deals that are available more widely. Managers' granting of market-based i-deals to high performers demonstrates allocation in line with the distributive justice allocation principle of equity. The market-value of these high performing employees provides them with leverage during i-deal negotiations, especially if they explicitly threaten to quit (during ex-post negotiations) or have alternative offers of employment (during ex-ante negotiations). Granting i-deals based on market-value suggests some employers may be prioritising external equity when granting certain i-deals. A predominant focus on market-value when granting certain i-deals also risks employers rewarding mobility rather than actual contribution, especially given that organisation-specific expertise may not be as valued in the external labour market but is beneficial to the current employer (Lepak and Snell 1999). Furthermore, granting financial i-deals based on market-value

alone risks creating internal inequity, especially if the organisation's compensation scheme is not competitive in the market, leading to co-worker perceptions that these market-based i-deals are not distributively fair (see Chapters 8 and 9 for further discussions of co-worker assessments of i-deals).

Given their potential to lead to internal inequity in addition to their exclusive and individualised nature, market-based i-deals also risk third-party perceptions that LMs are inconsistently implementing HR practices (cf. Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Wilkinson et al. 2017; Fu et al. 2020). This may be detrimental to organisations as consistent implementation is linked to positive outcomes (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Fu et al. 2020). Plus, such perceptions by third parties may have a negative impact on their assessments of procedural injustice, for which consistency has been put forward as a relevant criterion (Leventhal 1980).

The exclusive versus more encompassing conditions upon which market-based and supportive i-deals are granted, affecting their potential availability to employees, suggests that the frequency of their use within organisations may also differ. While the samples or findings of this exploratory, qualitative research are not intended to be statistically generalisable, this suggestion could be reflected by the number of i-deals that would be considered market-based versus supportive that were discussed by respondents of this research (see Limitations, section 7.7). The relative frequency of different types of i-deal is not well understood and merits further investigation.

Together, the findings demonstrate that despite the very different motivations behind market-based and supportive i-deals, managers are attempting to allocate these arrangements fairly: against consistent criteria that are well established and accepted within the organisational justice literature. Yet, the employer motivations for granting i-deals identified by this research (secure or support) do not fully correspond to the employee motivations for negotiating i-deals presented by Bal and Vossaert (2019). Supportive i-deals align to Bal and Vossaert's (2019) accommodative i-deals, described as negotiated by employees to solve a problem or conflict in their jobs and circumstances. Missing, however, is growth i-deals: negotiated by employees to learn and develop themselves. This is likely to be explained by the content of i-deals associated with these motivations. Bal and Vossaert (2019) found financial i-deals to be unrelated to accommodative and growth i-deals, whereas this research identified financial i-deals as being used most often by LMs in recognition of an employee's market value. Plus, the findings of this research did not focus on task or developmental i-deals, the content of which would be more supportive of employee growth. Consequently, it is possible that other employee (pertaining to financial i-deals) and

employer (pertaining to task and developmental i-deals) motivations for creating i-deals exist, but have yet to be identified by research. Furthermore, given that i-deals are co-created and intended to benefit both the employer and employee, the necessity for employee and employer motivations to correspond, or how these motivations influence each other, are avenues for further exploration.

This research also contributes to recent work considering the process of negotiating i-deals (Simosi et al. 2021), as employers' motivations for granting i-deals will shape their bargaining behaviour (ibid). For example, granting financial i-deals (likely to be seen as zero-sum situations) for retention purposes may lead employers adopting distributive strategies (Weingart et al. 2007) to seek out the lowest offer that will secure the employee. In contrast, granting flexibility i-deals to support employees may lead to the adoption of integrative strategies (ibid) that seek to problem-solve and develop creative mutually beneficial solutions.

By exploring managerial motivations and conditions for granting i-deals (both ex-post and ex-ante), the research also helps to expand our limited understanding of when and why requests for i-deals may be denied. The research therefore distinguishes between i-deals which are requested and i-deals which are granted: a distinction often overlooked by the existing literature as a result of the tendency to examine i-deals from the perspective of employees *with* i-deals (Liao et al. 2016). The findings in the current study demonstrate a reluctance by some LMs to grant flexibility i-deals to new employees or those who are under-performing. The conditions of trust required for granting supportive i-deals may also result in LMs being more inclined to deny such arrangements during ex-ante negotiations. Future research should explore the possible consequences of denying i-deals that, if granted, would have been supportive in nature. For example, denied requests for supportive flexibility i-deals may lead to reduced perceived organisational support (POS). This risks detrimental outcomes for organisations given POS has been associated with in-role performance and reduced turnover (Kurtessis et al. 2017). Further, the findings suggest managers are unlikely to grant financial i-deals to all but those with the highest market value and may deny requests motivated by an employee's lifestyle needs rather than those that are market-oriented and based on performance. Managers being unlikely to grant ex-post financial i-deals to all but those with the highest market value creates the potential for 'winner-take-all' effects in the negotiation of financial i-deals (Frank and Cook 1995). Further research should continue to question the reasons managers deny financial i-deal requests and the possible repercussions of this (cf. Hornung et al. 2010), including equity implications in particular (cf. Frank and Cook 1995). For example, do denied requests for financial i-deals risk employees engaging in behaviours to

restore equity, such as decreasing effort (Colquitt et al. 2001) and/or increase the likelihood that the employee leaves the organisation? The influences on and consequences of denying i-deal requests should also be explored for the developmental and task i-deals not examined by this research.

Next, the chapter considers how the allocation principles discussed here, adopted by employers when granting i-deals, influence employee perceptions of why their i-deal was granted. These perceptions are found to influence the nature of the exchange encompassed by the i-deal, as well as the outcomes of the arrangement.

### 7.3. *Social/relational versus economic/transactional i-deals*

Employers' granting of i-deals based on principles of equity and need, and motivated by securing or supporting employees, influences employee perceptions as to why their i-deal was granted. Furthermore, employee responses (and consequently the outcomes of i-deals) are shown to be influenced by these perceptions of the basis for the formation of their i-deal. This observed interaction between employer motivations and conditions for granting i-deals, employee understanding of why their i-deal was authorised, and those employees' subsequent responses has led to this study characterising i-deals and their benefits as *market-based* and transactional, or *supportive* and relational. This presentation of i-deals draws upon existing theorising by research that has considered the extent to which i-deals are either transactional/economic versus social/relational in orientation (e.g., Rousseau et al. 2009; Lee and Hui 2011; Liao et al. 2016).

Market-based i-deals reflect the principles of transactional/economic exchanges that are more limited in their scope (Blau 1964). These findings align to concerns raised by Conway and Coyle-Shapiro (2016) regarding the applicability of social exchange theory for explaining the outcomes of i-deals that are perceived as special treatment by employees. The consequence of market-based i-deals failing to lead to employee reciprocation is that the benefits of these arrangements remain specific to the terms of the agreement. Employees do respond to these i-deals in functional ways (by joining or staying with the organisation), but more relational organisational benefits resulting from positive employee attitudes and behaviours may not materialise. Existing work has presented "threat to quit" i-deals (Rousseau et al. 2016) that are negotiated following an employee threatening to terminate their employment. This research extends upon the presentation of "threat to quit" i-deals by demonstrating a dichotomy of ex-post i-deals negotiated through power and alternative offers (market-based i-deals) versus high quality relationships (supportive i-deals). Even when threats to terminate employment are not made



explicitly, this research shows the potential for employees to use their market-value as leverage when negotiating certain i-deals.

In contrast to market-based i-deals, supportive i-deals act in line with our understanding of social/relational exchanges that are broader in scope (Blau 1964; Rousseau 1995; Shore and Barksdale 1998; Cropanzano and Mitchell 2005). As a result, the organisational benefits of these i-deals spill over to other components of the employment relationship. The benefits of supportive i-deals may therefore be broader than those associated with market-based i-deals, although they may not be as specific (Conway and Coyle-Shapiro 2016) or predictable given that social exchange leads to unspecified obligations (Cross and Dundon 2019). Plus, research indicates individual differences in the extent to which reciprocity is embraced as a norm (see Cropanzano and Mitchell 2005), highlighting the potential for different employees to reciprocate their supportive i-deals to varying degrees.

Understanding supportive i-deals as social/relational exchanges further reinforces the need for future research to explore the consequences of denied requests for i-deals that, if granted, would have been supportive in nature. Do denied requests for ex-post flexibility i-deals signal to employees that their employment relationship is not characterised by mutual obligations and trust? What are the consequences of denying such requests for the quality of the employment relationship and employee attitudes and behaviours moving forward?

Through supportive i-deals, this research extends upon existing understanding of i-deals by revealing a pathway to positive outcomes that is not reliant on i-deals being exclusive and reserved for high performers. This understanding is particularly beneficial given existing recommendations that LMs be open to granting i-deals to many workers so that co-workers perceive the arrangements as fair: an important element of i-deals functioning successfully (Rousseau et al. 2016). This research finds that broadly distributed i-deals are tied to positive outcomes through employee perceptions of being supported (cf. Kurtessis et al. 2017) and acts of reciprocity (cf. Cropanzano and Mitchell 2005). Supportive i-deals provide an actionable approach to achieving the positive benefits for job performance that arise from HRM practices that are both individually responsive and consistent in their implementation (Fu et al. 2020). Thus, despite the i-deals literature having predominantly developed around notions of star performers (Bal 2017), supportive i-deals may be of greater interest than market-based i-deals to employers as tools for introducing flexibility into their management practices. Next the chapter considers how the i-deal pathways discussed to this point are influenced by the content of resources offered by i-deals.

#### 7.4. *The formation and functioning of i-deals offering different resources*

Differences emerged between the formation and functioning of the financial and flexibility i-deals that were explored, contributing to our understanding of the nature and outcomes of i-deals based on their content. Financial i-deals appear most likely to be market-based. This aligns to the limited prior research on financial i-deals, with Rosen et al. (2013) finding evidence of a positive relationship between these arrangements and continuance commitment. Plus, these findings suggest that “threat to quit” i-deals (Rousseau et al. 2016) are often likely to be financial in nature (cf. Rousseau 2005). In contrast, this research suggests flexibility i-deals (granted ex-post) are more conducive to being supportive in nature. This conceptualisation of ex-post flexibility i-deals is in contrast to existing discussions that suggest flexibility i-deals are transactional in nature due to the economic effects of reducing or increasing one’s working hours (e.g., Lee and Hui 2011). This conceptualisation of flexibility i-deals appears to focus on the consequences of the arrangements, rather than the nature of the i-deal and what its resources offer to employees (discussed further below). This research also adds nuance to Lee and Hui’s presentation of flexibility i-deals by revealing that they may be transactional when negotiated ex-ante, but more relational when negotiated ex-post (see section 7.5 for more detail). Thus, failing to separate out ex-ante and ex-post flexibility i-deals may account for previous work that has empirically linked flexibility i-deals and transactional exchange, in contrast to the findings of this study.

Of note is that prior research by Liao et al. (2016, p.S17) has suggested that compared to flexibility i-deals, “developmental i-deals appear to be more strongly associated with perceiving the employee-employer relationship as a social exchange.” Considered alongside the findings of this research, this suggests that financial, flexibility and developmental i-deals may exist along a market-oriented (transactional) – supportive (relational) continuum. The existence of such a continuum merits further research. For example, future studies should consider how the content of i-deals, and their relative proportion in an individual’s employment package (which is made up of a combination of both economic and social resources), influences employee assessments of their employment relationship.

The different outcome pathways found to be relevant to i-deals of differing content (financial versus flexibility i-deals) encourages consideration of how the nature of the resources on offer by these arrangements influences the i-deal pathways that have been identified. Turning first to financial i-deals, while in some organisations (like InsuranceCo) certain benefits are offered based on position in the organisational hierarchy, the ability for individual negotiation through i-deals, in theory, removes the potential for status to be associated with, and offered through, these

arrangements. Instead, the pay and (majority of) benefits available via these i-deals have a monetary value to employees, clearly aligning them to the “money” category of resources presented by social resource theory (SRT) (Foa and Foa 1974; 1980, see section 3.2). Money is considered a highly universalistic resource (Foa and Foa 2012), and this study’s finding that employers allocate financial i-deals against equity principles clearly aligns to existing theorising that, as a “cost-oriented rule”, the equity allocation principle is associated with universalistic resources (Törnblom et al. 1985).

In addition to being classified as monetary resources, some benefits (e.g., a company car) may also be described as offering goods (Foa and Foa 1974; 1980, see section 3.2). Goods can be considered both universalistic and particularistic resources. Unlike money, goods are concrete resources (whereas money is considered to fall in the middle of the concrete-abstract continuum), and existing theorising suggests concrete resources are associated with the allocation principles of either equality or equity (van Kreveld and van Beemen 1978). As such, regardless of whether some of the resources provided by financial i-deals are perceived as money, goods, or both, employers’ granting of these arrangements being driven by considerations of equity, aligns to previous findings examining the relationship between SRT and distributive justice allocation rules. Furthermore, financial and concrete resources have been emphasised as the basis of transactional exchanges (Shore et al. 2006), providing explanation for the transactional nature of financial i-deals and their specific benefits.

The resources offered to employees through flexibility i-deals do not align as clearly with the categories presented by SRT as financial i-deals. Despite flexibility i-deals leading to potential changes in an employee’s working hours or location, these environmental conditions are not the actual resources being exchanged through these arrangements. I-deals leading to a reduction in working hours were (mostly, see section 7.7) accompanied by a proportional reduction in salary, so an employer is not offering up its time (which has a financial component within organisations) to the employee. Nor does an organisation control the location (or the benefits of that location, e.g., reduced commuting time) that a flexibility i-deal might allow an employee to work in. As discussed in section 3.2, Foa and Foa’s (1974; 1980) resource categories are intended to represent the meanings that individuals tie to specific exchanges. The changes experienced by employees as a result of (ex-post) flexibility i-deals were presented by both sides of the exchange as given in support or accommodation of the employee’s needs. As such, the resource on offer falls within the SRT category of “love”. Love as a resource does not have to be romantic but is an "an

expression of affectionate regard, warmth, or comfort" (p.162) and can be demonstrated by employers caring for or supporting their employees (Törnblom and Kazemi 2015).

Previous theorising, based on Foa and Foa's (1976) argument that the cost of giving a resource decreases with increasing particularism, has suggested that a particularistic resource such as love will be assessed against the less cost-oriented principles of equality or need (Törnblom et al. 1985). Törnblom and Kazemi (2015) suggest that empirical investigations have demonstrated the tendency for love as a resource to be assessed against the equality principle, although contextual and cultural influences have been shown to have significant influence (Törnblom and Foa 1983; Törnblom et al. 1985; Martin and Harder 1994). In contrast, this research demonstrates a preference by LMs to allocate love/support (represented through the granting of flexibility i-deals) via the principle of need. A possible explanation for this is that when judgements via the rule of equality are not applicable due to i-deals being inherently individualised and exceptional arrangements, the principle of need becomes the most appropriate allocation principle given the resource's particularistic nature. Previous research has demonstrated this same, secondary preference before, with Törnblom et al. (1985) finding that despite a sample expressing a preference for love to be distributed equally, allocation via need principles was also considered acceptable. Further, given the support on offer through flexibility i-deals, their relational orientation is to be expected given the socioemotional aspects (e.g., being taken care of by your employer) of relational exchanges have previously been emphasised (Shore et al. 2006).

It is, however, of note that none of the flexibility i-deals discussed by respondents of this research involved employees increasing their working hours: they reduced or compressed their hours, or changed their working location. It would therefore be an interesting avenue for future research to consider whether i-deals increasing an employee's hours would still follow the supportive pathway identified here. I-deals increasing an employee's hours may offer entirely different resources and have a different meaning to employees, offering more economic benefits than support for reducing work/personal-life conflicts. This may potentially change the basis upon which these arrangements are allocated by LMs, and consequently employees' responses to their authorisation.

Overall, the resources on offer through financial and flexibility i-deals appear to have a strong influence on managers' authorisation of i-deals, as well as the nature of these arrangements and their outcomes. This has implications for the categorisation of i-deals that has often been disputed within the literature to date (e.g., Rousseau and Kim 2006; Rousseau et al. 2016; Rosen et al. 2013; Gascoigne and Kelliher 2018, see section 2.2.). Existing disputes differentiate between

*why* an i-deal is being negotiated and *what* is being negotiated (see Hornung et al. 2010; Rosen et al. 2013), whereas this research suggests categorisation according to the resource being offered to the employee (as well as its meaning to the employee) may be more appropriate.

Categorisation based on the provided resource is subtly different to what is being negotiated, as demonstrated by flexibility i-deals where it is an employee's working hours and location that are being negotiated, but these are not the actual resources on offer. A potential consequence of re-categorising i-deals in this manner, for example, could be to separate flexibility i-deals that increase versus decrease working hours if one, respectively, offers the employee monetary resources and the other support/love. Re-categorising i-deals in line with the offered resources, which this research suggests is relevant to the formation and functioning (including outcomes) of i-deals, may help to address the inconsistencies between works examining i-deal outcomes to date (see section 2.5).

Nevertheless, the formation and functioning of i-deals should not be reduced to being reliant on the content of these arrangements alone. As well as their content, the timing of i-deals was found to influence the two i-deal pathways determined by this research, as is discussed in the next section.

#### *7.5. The formation and functioning of ex-ante versus ex-post i-deals*

The findings show that due to the lack of a pre-existing relationship between the employer and employee during ex-ante negotiation, the trust required for LMs to grant i-deals that support employees - and that is the basis of social/relational exchanges (Shore et al. 2006; Cross and Dundon 2020) - may not be present. Consequently, LMs may be more reluctant to grant flexibility i-deals to support employees when negotiation takes place ex-ante. In contrast, because employers have the specific goal of recruiting when ex-ante negotiations are taking place, their motivation to grant flexibility i-deals in recognition of market value appears to increase: providing leverage to the employee requesting the i-deal. The research therefore demonstrates that while the content of flexibility i-deals may be associated with the supportive i-deal pathway (offered on the basis of need, relational in nature and encouraging employee reciprocation), ex-ante negotiation can override this association and lead to market-based, transactional flexibility i-deals.

This research therefore contributes to our understanding of the influence of the timing of negotiation on the formation of i-deals, and to the limited number of studies that take account of ex-ante i-deals (Liao et al. 2016). The findings add nuance to existing suggestions that employers

will be reluctant to grant ex-ante i-deals to all but those deemed the most crucial to recruit (Rousseau et al. 2006; Lee and Hui 2011). It is revealed that this reluctance may exist for supportive i-deals granted on the basis of high-quality relationships grounded in trust, but that in order to recruit desirable candidates, LMs may actually be more likely to grant market-based ex-ante i-deals on the basis of a desired candidate's market value.

As such, the research reveals that the timing of i-deal negotiation (ex-ante versus ex-post) may act to influence the very nature and the subsequent outcomes of certain types of i-deal but not others. The findings suggest that financial i-deals are market-based and transactional in nature regardless of when they are negotiated. However, for flexibility i-deals the timing of negotiation does have an impact. Given the potential for a market-oriented (transactional) – supportive (relational) continuum of financial, flexibility and developmental i-deals that has been discussed above (see section 7.4), future research should consider how the timing of negotiation affects the granting of developmental i-deals. If developmental i-deals are, as suggested by Liao et al. (2016), more relational than flexibility i-deals, this supports existing suggestions that developmental i-deals are unlikely to be granted ex-ante (e.g., Simosi et al. 2021). Whereas this research suggests flexibility i-deals *can* be negotiated on a transactional basis (thus accommodating ex-ante negotiation), a lack of trust may act as a more significant barrier to the ex-ante granting of developmental i-deals if they are indeed more relational in nature.

### 7.6. *Practical implications*

As a result of the findings presented and discussed here and in Chapter 6, a number of practical implications for different organisational stakeholders emerge. LMs should be empowered to create i-deals with their current team members and/or during the recruitment process, in order to achieve different desirable outcomes. Supportive i-deals are examples of HRM practice that LMs can implement consistently while also offering individual responsiveness to employees: a combination that has been associated with increased job performance (Fu et al. 2020). Market-based i-deals may be effective tools for recruiting or retaining star performers, but these benefits should be weighed up against the possible limits and risks of these arrangements. Such arrangements may not lead to positive employee attitudes or be sufficient for building quality relationships with high performing employees. This is supported by previous work that found extrinsic motivation to be negatively related to affective commitment, but positively associated with negative outcomes, such as turnover intention and continuance commitment (Kuvaas et al. 2017). Financial i-deals specifically have also been associated with continuance commitment (Rosen et al. 2013). Plus, market-oriented financial i-deals can lead to internal pay inequity for co-

workers. This is consequential as inconsistent implementation of HRM practices can have negative consequences, including reduced job performance (see Fu et al. 2020). When considering granting an i-deal in response to an employee threatening to leave, LMs should question whether the i-deal is individually warranted or reflects sub-market compensation for a whole cohort of employees. Overall, employers considering financial i-deal requests should be alive to risks that these initially attractive arrangements with seemingly mutual benefits, may ultimately not turn out to be mutually beneficial if there are unintended consequences through negative co-worker reactions.

HR representatives are encouraged to enable and promote the creation of supportive i-deals, that might otherwise be seen as undesirable inconsistencies. I-deals offered widely, rather than exclusively, are more likely to be judged as fair by co-workers (Rousseau et al. 2016). In contrast, given the limitations and/or risks of financial i-deals, it may be beneficial for HR to take on a gatekeeper role in granting these more transactional arrangements. However, denied requests for market-based i-deals may also have negative consequences. Thus, employer representatives should be aware of the risks of offering sub-market compensation to employees, as this may increase the likelihood of requests for financial i-deals that can be problematic whether they are granted or denied.

Given the highlighted benefits of supportive i-deals, employees should also be encouraged to talk to their LM regarding the personalisation of their employment terms in support of their specific needs.

### *7.7. Limitations*

Turning to limitations of the research, it has already been noted (see section 7.4) that none of the flexibility i-deals discussed by respondents of this research led to employees increasing their working hours: they reduced or compressed their hours, or changed their working location. The applicability of the findings to flexibility i-deals that increase an employee's working hours is therefore in question. Given that a likely motivator for increasing one's working hours will be to increase income, i-deals of this nature may be considered financial in nature by employees and employers. An important avenue for future research is therefore to consider whether such arrangements still follow the supportive pathway identified here, or whether the interdependence between the resources on offer by such i-deals correspond to different stakeholder attitudes and responses.

In relative terms, more limited data were collected relating to financial i-deals and ex-ante flexibility i-deals in comparison to ex-post flexibility i-deals. This may be a consequence of these i-deals being less common due to the more exclusive conditions upon which they have been found to be granted. The qualitative, exploratory nature of the research means the findings are not intended to reflect generalisability but rather inform theoretical models. This could inform future research and a quantitative follow up could efficiently capture more information regarding financial and ex-ante flexibility i-deals.

Furthermore, only a small amount of collected data related to employees who had negotiated multifaceted i-deals incorporating, for example, both financial and flexibility elements. Arrangements of this nature include i-deals whereby employees reduce their working hours but their salary is not reduced to reflect this change. Another example could include an i-deal whereby an employee has negotiated home working and a more comprehensive benefits package. I-deals with multiple components were able to be agreed up-front or build up over time through successive negotiations. This data highlights the potential for future research to explore whether market-based and supportive i-deal pathways can co-exist and how this influences employee responses. I-deals of this nature may, for example, act as a route to organisations reaping the relational, as well as functional, benefits of i-deals offered on an exclusive basis, and reduce the risk of high performing employees in receipt of these i-deals experiencing feelings of continuance commitment.

### *7.8. Summary of substantive contribution*

I-deals are of increasing interest to employers as tools for introducing flexibility into their management practices. It is therefore important for organisations to understand the range of outcomes that may result from i-deals, as well as the pathways through which these outcomes might be achieved. These research findings have identified different employer motivations and conditions for granting i-deals that are reserved for high performers versus those more widely available, and two outcome pathways based on the employee's perceptions of why and on what basis their i-deal was granted. These pathways suggest that market-based i-deals (exclusively reserved for high performers) are transactional and have specific, functional benefits to organisations, while supportive i-deals that are available more widely to trusted employees, can have broader relational (attitudinal and behavioural) benefits through acts of reciprocation. The identification of these pathways, which combine employee and employer perspectives, reiterate the importance of conducting multi-stakeholder research for a holistic understanding of i-deal formation and functioning within organisations. Employer allocation of i-deals aligns to well-



established distributive justice allocation principles, highlighting organisational justice theory as an appropriate lens for the exploration of i-deal formation. The relevance of SRT to the formation and functioning of i-deals is also highlighted. The nature of the resources offered by i-deals appears to influence LM's granting of the arrangements, as well as employee responses to them, as flexibility i-deals and financial i-deals tended to align to different pathways. However, the research also demonstrates that the timing of i-deal negotiation, and its impact on the employer-employee relationship, should not be overlooked. Ex-ante negotiation was found to be capable of overriding the observed association between flexibility i-deals and the supportive pathway.

In the following two chapters, the findings focused on co-workers' assessments of financial and flexibility i-deals as fair are first presented descriptively (Chapter 8), and then discussed theoretically (Chapter 9).

## 8. Findings – Why and how co-workers assess i-deals as (un)fair

The next set of themes to be presented are findings related to research question three, which considered why and how co-workers assess i-deals as fair or unfair. In exploring *why* co-workers assess i-deals as fair, it is revealed that exposure to fair i-deals can lead to co-workers becoming more open to the creation of i-deals (of the same type), in comparison to viewing them as unfair exceptions to policy when first encountering them. However, this exposure does not lead to co-workers accepting all i-deals of that type, but instead to the adoption of certain criteria to assess their fairness: *need* in the case of flexibility i-deals, and *equity* for most financial i-deals (although a specific exception is noted and explored). The findings further support understanding of why co-workers assess i-deals as fair by revealing what constitutes flexibility i-deals as *needed* and financial i-deals as *equitable* in the eyes of co-workers. The findings provide insight into *how* co-workers assess i-deals as fair by highlighting influences and information that inform their evaluations against the relevant criteria they've adopted. For flexibility i-deals, shared understandings of *need* appear to exist and influence perceived fairness in the eyes of co-workers. Whether co-workers have shared experiences of why the employee requested the i-deal can also influence their assessments of whether the arrangement is needed. As such, knowing the reason an employee has requested a flexibility i-deal informs co-workers' assessments of fairness. When assessing the *equity* of financial i-deals, co-workers use social comparisons, based on their observations of the employee's performance, to decide whether they perceive the employee as a (comparatively) high performer. The findings also reveal how the timing of i-deal negotiation influences co-workers' assessments of financial i-deals as *equitable*, but not flexibility i-deals as *needed*.

The chapter presents the findings related to why and how co-workers assess flexibility i-deals and financial i-deals separately, starting with flexibility i-deals.

### 8.1. *Why and how co-workers assess flexibility i-deals as fair or unfair*

The findings reveal why and how co-workers assess flexibility i-deals as fair. Starting with findings relevant to *why* co-workers assess the fairness of flexibility i-deals, the impact of exposure to similar i-deals is considered first. Next, the findings highlighting co-worker assessments of the perceived need of flexibility i-deals are explored. This section presents findings related to both *why* and *how* co-workers assess i-deals as fair, due to interviewees' explanations of the criteria

they use for assessing flexibility i-deal fairness (re. why) often being provided hand in hand with their descriptions revealing the influences and information that inform these assessments (re. how). To complete the exploration of *how* co-workers assess flexibility i-deal fairness, the next section presents the findings revealing how the timing of i-deal negotiation influences (or in this case, fails to influence) co-worker assessments of flexibility i-deals as needed and fair.

#### *8.1.a. The influence of exposure to flexibility i-deals*

The findings suggest that while co-workers may view flexibility i-deals as unfair exceptions to standard practice when they first encounter the arrangements, through exposure to fair flexibility i-deals they can become more open to their creation.

Interviewees described colleagues who were not accepting of any flexibility i-deals and suggested their resistance to the creation of these arrangements was due to a lack of experience of, or exposure to, flexible working. Many of these colleagues were described as “*tend[ing] to be older, or they’ve worked [in the same company] forever*” (Erik: co-worker, ConstructionCo), and the interviewees suggested this was because these individuals had always worked in very traditional ways. For example, Mo (co-worker, InsuranceCo) described a colleague he’d worked with at InsuranceCo as “*stuck in his ways*” and being against any home working because “*he liked to see people working at their desks*”. Christian agreed that these individuals’ past experiences were affecting their attitudes towards flexibility i-deals:

*...because that's how they've always been, how they've had to be to get to their level...that's how they've been working. So, I think there's a bit of an expectation that everyone should do the same and people shouldn't be allowed to do it differently.*

Christian: employee with a flexibility i-deal, InsuranceCo

However, it was not exclusively older or longer-tenured colleagues, more familiar with traditional approaches to work, that were described as resistant to flexibility i-deals. Amelia suggested that some employees on the graduate scheme, most of whom were in their first professional role after university, perceived flexibility i-deals negatively:

*Some of us grads can be a bit judgey I guess. The other day on the WhatsApp, we all have a big WhatsApp group [laughs], there was some huffing about someone ... who finishes early and works from home a bit ... which is quite odd when you think about it. I think it's just still new to us. ...I suppose we are all very ambitious as grads and we probably forget... and aren't used to seeing people having priorities other than work.*

Amelia: co-worker, InsuranceCo

At this early stage of their career, potentially less appreciative of the need for some employees to work flexibly, and with a lack of experience or exposure to flexible working, these graduates were described as less accepting of flexibility i-deals.

Further, it was suggested that for these individuals who were resistant to flexibility i-deals, even childcare requirements wouldn't be a good enough reason to create such an arrangement. This was despite childcare being put forward as one of the reasons that most employees agree is a fair justification for creating a flexibility i-deal (discussed further in section 8.1.b):

*...it's all they've ever experienced; they've never seen flexible working. ...I don't even think childcare would be good enough [as a reason for a flexible working arrangement] for them.*

Laurie: employee with a flexibility i-deal, ConstructionCo

In comparison, co-workers who had observed or experienced more flexible working arrangements and seen them operate successfully were described as more open to flexibility i-deals. Charlie compared colleagues at ConstructionCo who resisted and were judgemental of flexibility i-deals, with those who were more accepting of the arrangements:

*It's the old way of thinking versus the fresh way of thinking. [In my team] we've got more new people from other companies who have seen it, been there, done that and seen flexibility work. [Others] are just like dinosaurs and don't like change...*

Charlie: employee with a flexibility i-deal, ConstructionCo

Furthermore, the findings revealed that exposure to i-deals may influence co-worker attitudes towards the arrangements by making that co-worker aware of potential opportunities for them to

request their own i-deal. Elizabeth described how the creation of the first flexibility i-deal within a department at InsuranceCo gave other colleagues increased confidence to negotiate their own:

*A lady, who isn't in our department, who I met through induction, has got a flexible working arrangement, and I think it's in Finance and they're a bit behind with everything [laughs]. So, she was the only person with an arrangement like that and at first it rocked the boat a bit, but then because she has it, other women felt more confident to ask because they could say "Look, she has it... Can I have that to?"*

Elizabeth: co-worker, InsuranceCo

However, while exposure to flexibility i-deals was described as leading to co-workers being more open to their creation, this does not mean these co-workers come to accept every flexibility i-deal as fair. Next, the findings demonstrate the criterion that, once exposed to flexibility i-deals, co-workers use to assess the fairness of these arrangements. In presenting these findings, what constitutes a fair flexibility i-deal in the eyes of co-workers is also revealed, as well as influences and information that inform co-workers' fairness assessments.

#### *8.1.b. Co-worker perceptions of flexibility i-deals as needed*

Numerous interviewees, such as Liv and Peter, suggested understanding the reason why an employee had requested a flexibility i-deal informed co-worker attitudes towards that arrangement:

*Even though the why doesn't affect me...it probably does change how I feel about it, people make judgements about it.*

Liv: LM with a flexibility i-deal, ConstructionCo

*With flexible working you can't help but think, say with childcare: that's a reasonable reason to do it, but that implies that I do think there are unreasonable reasons and I'm not sure exactly what those are.*

Peter: HR and LM, ConstructionCo

The implications of these findings are that understanding why an employee has requested an i-deal supports their assessments of the arrangement's fairness. Laurie specified that knowing why a flexibility i-deal had been created allowed her to assess whether it was *needed*:

*So, I do know the reason why she works at home every Friday and because it's for her kids, of course, it's totally fine. I do think if I was working with someone, I would feel a bit differently if it was to look after their kids rather than something else, ... I don't know, that wasn't really needed.*

Laurie: employee with a flexibility i-deal, ConstructionCo

The findings revealed that perceived *need* was the (distributive justice) criterion that many co-workers were using to assess the fairness of flexibility i-deals. Plus, a strong theme to emerge from the findings was that co-workers judge flexibility i-deals as fair when they believe the arrangements are needed by the employee to reduce conflicts between their work and personal life. For example, Cassie (co-worker, InsuranceCo) described the flexibility i-deal of one of her colleagues and suggested that because that employee “*has kids, she has more of a need than others in the team*”.

Amelia and Alexis agreed that when a flexibility i-deal was *needed* to support childcare, it was more likely to be accepted by others:

*Some things you just accept. So, if someone had a genuine need for wanting to work outside of core hours or work from home, then you would accept it, like for childcare... Whereas, I think if somebody said "I want to work seven til three" and they didn't have a good reason then I think it would become a problem and other people would feel put out.*

Amelia: co-worker, InsuranceCo

*People definitely think that if someone has children then they need it... Childcare is almost considered the ultimate reason and people think it can't be questioned.*

Alexis: HR and LM, InsuranceCo

Like Alexis, numerous respondents described childcare and other caring responsibilities as universally agreed upon, justifiable reasons that an individual might *need* a flexibility i-deal. Mo agreed and added that reducing the impact of your commute was another commonly accepted reason to have a flexibility i-deal.

*People on the team with young kids, anything they might have would just be accepted. That's seen as a stronger reason for it. The other one is long commutes. A lot of people here live a long way away and everyone seems very accommodating of them having arrangements in place to help with that.*

Mo: co-worker, InsuranceCo

The same sentiment was expressed by some of the respondents at ConstructionCo, as demonstrated by Paul explaining that he believed everyone was supportive of flexibility i-deals in scenarios where the employee had a long commute:

*...everyone understands now that commuting for hours every day isn't any good.  
... More so than you might expect people really get that and won't take issue with you working from home a couple of times a week or whatever to help...*

Paul: LM with a flexibility i-deal, ConstructionCo

These findings suggest that commonly shared understandings of reasons that qualified as *needing* a flexibility i-deal existed in the case organisations, and involve resolving work/personal-life conflicts. If flexibility i-deals were created or requested that weren't considered to resolve or reduce such conflicts, and didn't align to these shared understandings of acceptable reasons for flexibility i-deals, they were less likely to be considered needed and fair by others. For example, Daisy described the reaction of one of her previous team members when in the past she'd made a request to work from home on Fridays. The arrangement was perceived negatively, despite a number of team members having similar arrangements, because her short commute to work led others to believe she didn't *need* the i-deal:

*...at the time I was living about a 10, 15-minute walk from the office... [and my co-worker] was like "well, you don't need to work from home, do you?" She was like "You're not that far away, it's not necessary."*

Daisy: co-worker, InsuranceCo

However, while these shared understandings were found to be prevalent within both case organisations, they were not universal. Instead, the findings highlighted that a co-worker's personal experiences and priorities could also influence their judgements of what constitutes *needing* a flexibility i-deal. For example, Verity described one of the senior managers at ConstructionCo as being resistant to the formation of any flexibility i-deals (or any form of flexible

working) and suggested that this was a result of him living so close to the office and not realising the impact of a long commute:

*Geoff is a perfect example. He's never been open to any of his team having any kind of recurring arrangement in place and they can never work from home. He lives like 2 minutes away so he doesn't understand that if you have to drive over an hour every day then that's really knacker.*

Verity: HR, ConstructionCo

Another example was provided by Lynne, who had felt judged by a small minority of colleagues for having a flexibility i-deal to help her balance work and being a parent. She felt that some people who didn't share her experiences were more likely to be critical of her arrangement:

*I think its certain people who don't juggle. They don't get it. ... They either don't have children or they have children but they have some full-time support... People who put 100 percent into their career. They don't seem to have a personal interest or any desire to accommodate any form of flexibility for themselves. Yeah, I think they then look poorly on people who do that. That's my experience. It's the ones that just don't do it.*

Lynne: LM with a flexibility i-deal, InsuranceCo

These findings suggest that a co-worker's personal experiences may affect whether they see flexibility i-deals as *needed*. Even though flexibility i-deals to support caring responsibilities or reduce the impact of commuting were commonly understood to be fair and needed to reduce work/personal-life conflicts, some co-workers who had no experience of those conflicts did not share this understanding. For example, Emma explained how her own attitudes towards flexibility i-deals changed once she had children:



*...this was before I had children. Myself and the manger I had at the time, and all the other team leaders, none of them did either, so I'll be completely honest, it was almost like she was a bit of a nuisance because she only does two days and we just have to, I don't know, try and muddle through, really... But now, having gone through it myself, I do look at it completely differently. ...At the time, until you've done it and you know how hard it is, I don't think that that appreciation is there. ...[Now] I think I'd spend a bit more time trying to support them with how they can try and make it work, but I think that the way I maybe looked at it before and how my peers would look at it, is that it's what she's chosen to do so she's got to try and make it work. Yeah, I don't think I would necessarily look at it like that now, I think I would try and support them a bit.*

Emma: LM with a flexibility i-deal, InsuranceCo

Whereas in the past Emma had been less supportive of a colleague who had a flexibility i-deal to support childcare, having now had children herself, she described herself as better understanding the conflicts and difficulties of being in that position.

Shared experiences also emerged as influencing co-workers' perceptions of flexibility i-deals when they believed that the arrangement had been created for a reason other than reducing work/personal-life conflicts, and thus wasn't widely agreed to constitute needing an i-deal. If an employee had negotiated an i-deal that brought them benefits, co-worker perceptions of the arrangement were influenced by whether or not they shared similar experiences to that employee, and understood the personal importance of the arrangement. This influence was commonly demonstrated by co-worker descriptions of flexibility i-deals created to support an employee's engagement in leisure activities, particularly exercise. For example, Liv, who plays netball once a week, and Peter, a keen cyclist, thought i-deals supporting engagement in leisure activities *should* be viewed with equal importance as other flexibility i-deals:

*It probably would be seen differently because it's like "oh, you just want to go and play golf?" or something, but it probably shouldn't be. They would be like "well, it's just golf isn't it?" but you could say "well, it's part of my health and wellbeing, it's something that's good for me."*

Liv: LM with a flexibility i-deal, ConstructionCo

*Pfft, there shouldn't be a difference but there obviously is. If somebody's not got kids, it doesn't mean the people with kids get that flexibility and not them. Do you see what I mean? It's lifestyle choices. If, say, going to gym is important to that person then that should be respected too, and frankly looking after themselves is good for the business.*

Peter: HR and LM, ConstructionCo

As individuals who engage in regular exercise themselves, Peter and Liv may be more likely to see value and understand the personal benefits in these activities and support the creation of i-deals in order to engage in them. It may also be in their self-interest to consider flexibility i-deals for this reason as fair, as this would allow them to fairly negotiate such an arrangement to support their own participation in sport or leisure activities in the future.

However, Liv and Peter's responses also acknowledge that they do not think this is how others perceive flexibility i-deals motivated by engaging in leisure activities, and data collected from other interviewees supported their assumptions. Others believed that engaging in exercise or personal interests were less justifiable reasons than others (such as childcare) for creating i-deals. Alexis (HR and LM, InsuranceCo) explained that *"if someone wants to do it for a garden course, for example, a lot of people here are like 'well that's not a valid reason.'"* Gregory, who had negotiated an i-deal to allow him to carry out duties as a Chair of Governors for a local school, was an example of an interviewee who held this view:

*I'm not nipping off to play golf or something like that. So, I would say my conscience is quite clear. I feel comfortable with that.*

Gregory: LM with a flexibility i-deal, ConstructionCo

In summary, shared understandings of reasons that justify needing a flexibility i-deal were apparent and influenced co-workers' assessments of flexibility i-deal fairness. However, co-workers' personal experiences also had influence on their fairness assessments and whether they were empathetic to the employee's reason for requesting a flexibility i-deal.

In addition to shared understandings and shared experiences influencing co-worker perceptions of flexibility i-deal fairness, whether co-workers were concerned with the timing of i-deal negotiation (ex-ante versus ex-post) was also discussed. These findings are presented next.

### 8.1.c. *The perceived fairness of ex-ante versus ex-post flexibility i-deals*

The collected data revealed that co-workers were equally open to flexibility i-deals being created ex-ante or ex-post. Plus, they were aware and critical of some managers being reluctant to grant flexible working arrangements ex-ante (see section 6.1.a):

*Everyone should be able to ask from day one. You shouldn't have to work for some arbitrary period of time before you think you can ask. That's not treating your employees like adults. It's not okay to have people sat around thinking "will they say yes if I ask now, or should I wait until I've been here six months?"*

Amelia: co-worker, InsuranceCo

Believing that flexibility i-deals should be allocated on the basis of need, these co-workers stressed that the timing of negotiation does not impact upon the need of the employee requesting the arrangement. They believed employees should be able to negotiate ex-ante flexibility i-deals if and whenever they need them:

*What I find difficult to understand is that if you're prepared to employ somebody, you should be prepared to take on board their requirements. If they need to work flexibly, trust them to do so. Yes, it's about trust, but the trust should be presumed and then it's theirs to lose. ...Why would you even want to recruit me if you don't trust me to work outside of your direct eye line?*

Samuel: employee with a flexibility, ConstructionCo

*...in the call centre...you can't join part time, if you tried to ask for that they'd just say no. You couldn't go part time early on, either. It doesn't make sense to me because the sort of person who goes part time, it's more of a need, like if you've got kids or something, so you can't really say "okay, I'll wait". It doesn't seem fair to say no just because you're just starting. It should be available to help the people who need it whenever they need it. I don't really understand and [management] suffer from it too because they then go on about "ah, we find it difficult to recruit good people".*

Mo: co-worker, InsuranceCo

The findings presented thus far are illustrated in the decision tree in Figure 8.1.

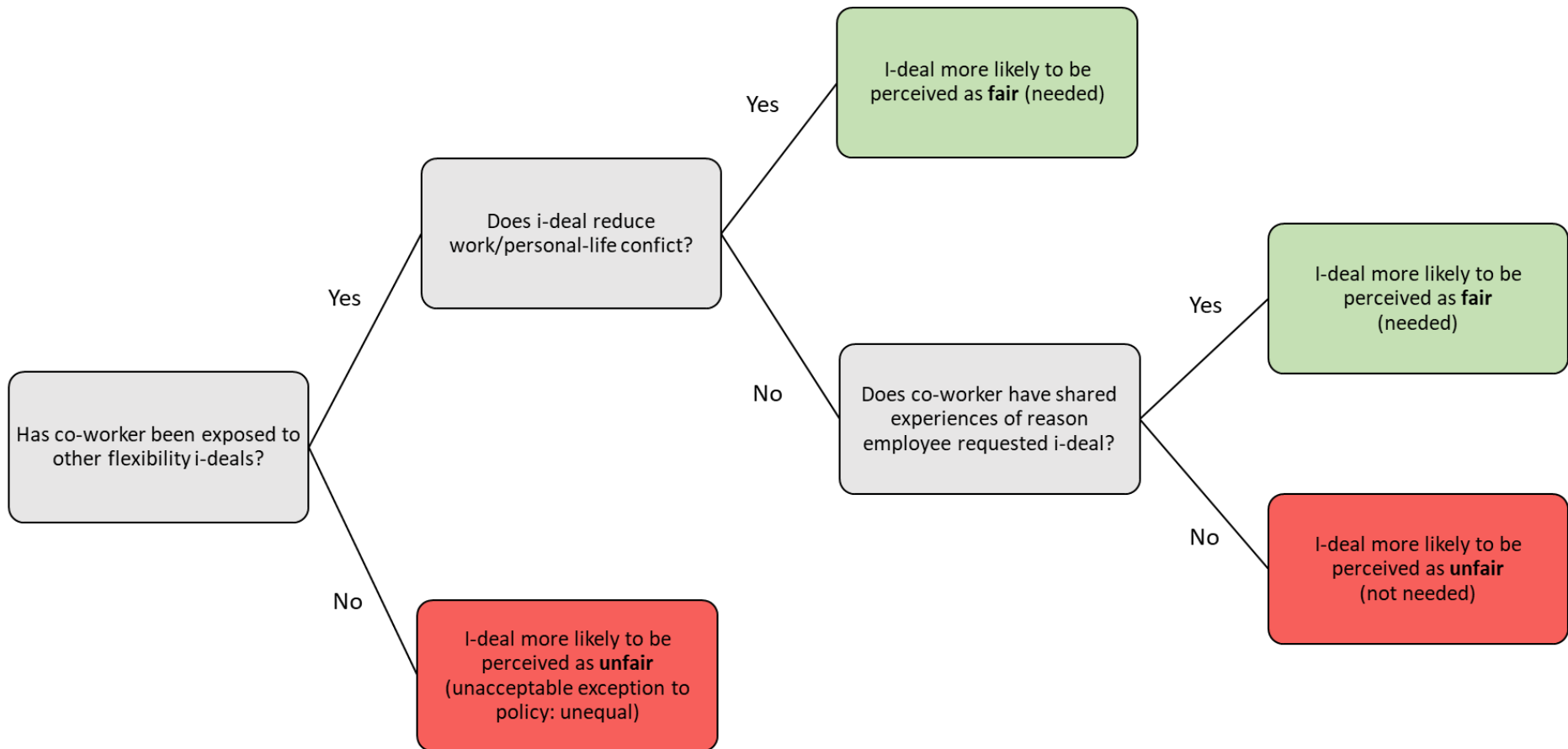


Figure 8.1. Decision tree illustrating co-worker assessments of flexibility i-deals as fair or unfair.

The findings presented thus far can be teased apart to reveal both why and how co-workers assessed flexibility i-deals as fair or unfair. Starting with why co-workers assessed flexibility i-deals as fair, the findings demonstrate that through exposure to these arrangements, co-workers could become more accepting of their creation. As a result of this exposure, rather than viewing all flexibility i-deals as unfair exceptions to policy, co-workers were adopting the (distributive justice) criterion of *need* for assessing their fair allocation. Furthermore, the findings reveal what co-workers' believed warranted a flexibility i-deal as needed. Flexibility i-deals were widely considered needed when they reduce conflicts between an employee's work and personal life (e.g., to support childcare responsibilities or reduce the burden of long commutes). They may also be considered needed by some co-workers if they bring personal benefits (e.g., to engage in personal hobbies). As for how co-workers assessed whether these i-deals are fair, understanding why an employee had requested a flexibility i-deal informed co-workers' assessments of need. The belief that flexibility i-deals are needed when they reduce work/personal-life conflicts appeared to be influenced by a shared understanding that existed across both case organisations. Alternatively, when a flexibility i-deal was perceived by co-workers as bringing benefits to the employee, whether the i-deal was considered to be needed was influenced by whether the co-worker shared similar experiences with the employee. When a co-worker shared experiences of why the employee had requested the i-deal (e.g., they both enjoyed sports or leisure activities) they were more likely to be supportive of the arrangement and consider it needed and fair, possibly due to an increased understanding of the benefits and importance of the arrangement. As such, the findings reveal the use of different influences on how co-workers assess the need (and fairness) of flexibility i-deals, dependent on the co-workers' understanding of why the i-deal has been requested. Based on the research findings, the timing of a flexibility i-deal does not appear to influence co-worker assessments of its fairness, because whether it is requested *ex-ante* or *ex-post* does not affect the employee's perceived need for the personalised arrangement. Next, the chapter turns to explore co-workers' fairness assessments of financial i-deals.

## 8.2. *Why and how co-workers assess financial i-deals as fair or unfair*

Now, the chapter moves on to explore why and how co-workers assess financial i-deals as fair, following a similar structure to section 8.1. First, the impact of exposure to financial i-deals is explored, before moving on to co-workers' assessments of financial i-deals as equitable. As with flexibility i-deals, interviewees tended to discuss *why* and *how* they consider financial i-deals equitable in an integrated manner, so these findings are presented together. An exception to the general trend for co-workers to be concerned with the equity of financial i-deals is also discussed,

and highlights the potential for employees and employers to perceive the resources offered by i-deals differently. Finally, findings are presented that demonstrate how the timing of financial i-deal negotiation influences co-workers' assessments of the arrangements as equitable and fair.

#### *8.2.a. The influence of exposure to financial i-deals*

Mirroring the findings related to flexibility i-deals, co-workers with past exposure to financial arrangements were found to be more open to their creation. In comparison, co-workers with limited exposure to financial i-deals felt they were unfair and potentially disadvantaged by the creation of such arrangements. For example, Peter described first discovering that other employees at ConstructionCo had negotiated better pay or benefits terms, and at the time feeling it was unfair:

*When I got the offer, it didn't occur to me for one second to ask for anything more... I made the presumption that everybody would be on the same terms and conditions. That's the way I'd always experienced it in my other jobs. Oh my god, when I found out they weren't, can you imagine? And then I...[was] involved in recruiting people who were coming into the business and asking for [more] money and they were getting it. It was difficult for me to take at first, I must admit. It seemed so unfair. I was not happy at all.*

Peter: HR and LM, ConstructionCo

However, co-workers described themselves as becoming more open to and accepting of the creation of financial i-deals as they gained exposure to these arrangements. For example, having seen many examples of financial i-deals during his employment at ConstructionCo, Ewan described the negotiation of these arrangements as fair and felt the opportunity to ask for one was available to everyone:

*I've been here longer than I care to admit, 21 years now, and the people who have started after me or are younger than me, if they've negotiated a better pay deal: fine, that's fair because that's what they've done and that's fair by me. ...I've seen it plenty of times so I know the opportunity is there. Nobody's discouraged from asking.*

Ewan: co-worker, ConstructionCo

Paul even described his own attitude towards financial i-deals changing since first becoming aware of them. When first exposed to financial i-deals he was unhappy that other people had been able to negotiate terms above the standard offering. However, he suggested that he was now more accepting of the arrangements and that in the future he will try to negotiate his own ex-ante financial i-deal:

*Good on them for asking and if I wanted the same, that would be down to me to do. I came here after 16 years with the last company and didn't even think to ask about benefits and that sort of thing. I dunno, you seem to think, or I thought "oh, it's going to be same as where I was" and "oh, it's going to be standard" you know, for everyone. But it's longer working hours here so really my package isn't as good as it was, whereas others seem to have done a better job at getting that. You can be pissed off about it, in all honesty I reckon I was at first but in hindsight I would've done it too if I'd realised. If I ever did move again that would be the first thing I'd be asking.*

Paul: LM with a flexibility i-deal, ConstructionCo

Paul's description also suggests that, similar to flexibility i-deals, exposure to financial i-deals can highlight to co-workers that there may be opportunities for them to negotiate their own personalised arrangement. Plus, it is noteworthy that Paul does not appear to be planning to negotiate a financial i-deal now he is in role. This may represent a difference in the perceived acceptability of negotiating financial i-deals ex-ante versus ex-post: attitudes that are discussed further in section 8.2.c.

Mo described similar effects from exposure to financial i-deals as Paul. He suggested that when initially exposed to financial i-deals co-workers may be aggrieved by their creation, but that this attitude changes as they realise the potential to negotiate their own i-deal:

*Some people who are a bit younger...maybe a bit less confident to negotiate, maybe it's not age, I guess. I guess when I say age, I probably mean experience: experience in the world of work. But you get that thing where people say "I never realised I could negotiate salary" and at first when they realise other people have done that they're outraged, you know? Going on like "oh it's so unfair" but over time that changes and they even see it as a good thing, because it clicks that they can do it too.*

Mo: co-worker, InsuranceCo

As with flexibility i-deals, this theme reveals that co-workers with little to no exposure to financial i-deals can perceive the arrangements as unfair. However, through exposure to these arrangements, co-workers can become more accepting of and open to their creation. One reason co-workers may become more open to the creation of financial i-deals through such exposure, is that through observing the arrangements they become more aware of opportunities to negotiate their own i-deals. Once open to the creation of financial i-deals, co-workers assess the fairness of these arrangements by evaluating whether or not they are equitable. These findings are presented next.

#### *8.2.b. Co-worker perceptions of financial i-deals as equitable*

The findings reveal that co-workers judge the fairness of financial i-deals based on whether they think the arrangement has been earned by the employee's performance. For example, respondents described it as appropriate and fair to agree to financial i-deals for employees who were high performers:

*I know a few people who are probably going above and beyond their role and... then I think the wage should be increased. I don't care if it's outside of process, I think they are being a bit used.*

Archie: co-worker, InsuranceCo

These findings suggest co-workers assess financial i-deals as fair when they are perceived to be equitable. In contrast, it was considered unfair if a financial i-deal was not equitable: the employee's performance was not perceived to warrant an exceptional arrangement or increased compensation:

*If they're outstanding and [management] have agreed to higher pay for them, I think everyone gets that. It's good for everyone here to keep people like that here... [but] people start to get annoyed when it's someone who's just kicked up a fuss and been given some more money but everyone that works with them is in their head thinking "they're not so special". I can think of a couple of examples of that and that's when people think it's unfair.*

Samuel: employee with a flexibility i-deal, ConstructionCo



In particular, the findings highlighted co-workers feeling financial i-deals were unfair when the employee's performance was not viewed to be any higher than their own, revealing co-workers use of social comparisons when assessing the *internal* equity of a financial i-deal:

*Pay is very sensitive and emotive because it's linked to the worth the organisation places on you. If someone is getting paid more than you when the work you're doing and the quality is the same it's like "What the f\*!k? That's not fair!"*

Amelia: co-worker, InsuranceCo

*He's been at this company in different roles for ages, like 10 years, so I think he was able to negotiate [higher pay than me] based on that... but it's like, we do the same thing and I'm not sure that's okay. ...Even [with that experience] ...I don't think he was doing a better job than me.*

Elizabeth: co-worker, InsuranceCo

As a consequence of co-workers being predominantly concerned with the (internal) equity of financial i-deals, and unlike when judging flexibility i-deals, they did not need to understand why the employee had requested the arrangement in order to assess its fairness. Some respondents suggested employee motivations for requesting a financial i-deal were all presumed to be the same, and it was commonly agreed that employees should be able to keep conversations about their compensation private:

*...if you found out someone had negotiated a really good remuneration package, you wouldn't dream of saying "well, why did you think you should have that?" [laughs] ...partly because it would be rude and also because it's obvious, isn't it? People ask for more money because they think they deserve more. We'd probably all do it if we thought they'd say yes.*

Christian: employee with a flexibility i-deal, InsuranceCo

*If someone else has negotiated their pay... I wouldn't expect to know the ins and outs of that conversation... in my opinion that should be a confidential conversation.*

Oliver: LM with a flexibility i-deal, InsuranceCo

Instead, the findings revealed co-workers felt they were able to judge whether a financial i-deal was fair/equitable based on their observations and perceptions of the employee's performance. For example, Samuel (employee with a flexibility i-deal, ConstructionCo) explained that "everyone knows who those [high performers] are". Liv agreed that co-workers feel able to judge the performance of their peers (with financial i-deals), but also acknowledged the potential for different conclusions to be reached:

*Everyone thinks they know how good everyone else they work with is at their job... [but] you're always going to get some people who think "oh yeah, that person is good at what they do" and someone else is like "they're useless." We're judging each other all the time and think we're the one who's right.*

Liv: LM with a flexibility i-deal, ConstructionCo

Combined, the findings suggest that co-workers judge financial i-deals as fair when they are considered internally equitable, and in order to assess equity, co-workers compare the perceived performance of the employee with their own (perceived) performance. However, the findings also reveal an exception to these identified themes. In both case organisations, objections were described to i-deals that increase an employee's holiday entitlement. A number of co-workers suggested that "holiday...should be the same for everyone" (Erik: co-worker, ConstructionCo), highlighting a preference by some for annual leave entitlement to be standardised and a belief that individual negotiations of this particular benefit were unfair:

*...there's one chap here who has 5 more days holiday than anybody else and thinks that's absolutely fine because if he didn't get it, he'd leave... It was just put in place because the directors didn't want him to go...he's a spoilt git. He'd already got more money and he just asked for it because he knew they'd give it to him, but it's so unfair on everyone else. I can see how it's good for the company in a way, why they did it ...you're going to help pay for all those other peoples' mortgages because we've got a company who will survive in the future. I can see all that and I still think it's unfair so can you fathom how other people would react if they knew?*

Peter, HR and LM, ConstructionCo

*Why should anyone get more holiday than everyone else? Yes... some peoples' jobs are considered more important I guess, and maybe "oh but we really need that person." Well then, pay those people more. Personally, I don't even love the fact that the lower grade you are, the less holiday you get here. I understand why it's a thing but I also don't at the same time. ...It's your holiday, your precious days off work, you shouldn't be able to negotiate your way to more than anyone else.*

Megan: co-worker, InsuranceCo

Megan agreed that individuals negotiating extra holiday entitlement was unfair, and even felt that InsuranceCo's current policy, whereby holiday entitlement increased with job grade, was unfair because she felt all employees deserved equal time off. This was a sentiment that was shared by others at InsuranceCo:

*...holiday should be standardised. I know other places do it too but giving some people more when they already get paid more for doing their jobs just feels unjust.*

Amelia: co-worker, InsuranceCo

The findings highlight some co-workers expressing a preference for the equal, rather than equitable, distribution of holiday entitlement as a benefit. This highlights how the resource on offer via an i-deal may influence why and how co-workers assess its fairness. Within a broad category like financial i-deals, the specific resource on offer through a given arrangement may differ in nature to other financial i-deals, leading co-workers to adopt a different criterion for assessing the fairness of that arrangement.

Next, the final findings to be presented in this chapter reveal the influence of negotiation timing (ex-ante versus ex-post) on co-workers' fairness assessments of financial i-deals.

### *8.2.c. The perceived fairness of ex-ante versus ex-post financial i-deals*

In contrast to their evaluations of flexibility i-deals, the timing of i-deal negotiation did appear to influence co-workers' assessments of financial i-deal fairness. The findings suggest co-workers may be more willing to accept financial i-deals when they are created ex-ante in comparison to ex-post:

*It's almost expected that people will negotiate your package when you get a new job, so no one is going to judge you for doing that.*

Matthew: employee with a financial i-deal, InsuranceCo

It was acknowledged by the respondents that ex-ante negotiation offers the best opportunity for an individual to successfully negotiate a financial i-deal, alluding to the increased leverage this scenario affords to the employee and the market-based nature of financial i-deals (as discussed in the two preceding chapters). Consequently, co-workers expressed increased acceptance of financial i-deals negotiated ex-ante, whereas ex-post exceptions to standard organisational procedure were, generally, presented as less justifiable:

*So, when you get into a new role, I think you have to do it then... that is when I'm thinking "okay, if it's a role that I want to be in for the next three to five years, then I want to ask for a bit more now." ...It's going to be your best chance for a while so I think people are pretty accepting of that. But once you're in the business the expectation is that you follow the process like everyone else.*

Megan: co-worker, InsuranceCo

This suggests that despite their predominant concern with the internal equity of financial i-deals (discussed above), co-workers do take into account external equity when assessing the fairness of ex-ante financial i-deals. Peter (the HR manager from ConstructionCo) agreed that co-workers are initially more accepting of ex-ante financial i-deals, highlighting that this is in the co-workers' self-interest if they also want to negotiate ex-ante. However, he suggested that in the longer term, differences in employee pay and reward resulting from ex-ante financial i-deals can lead to co-workers feeling aggrieved:

*In my experience, people like the idea of negotiation during the offer stage because they can do it then too, so initially they're okay with it, at least in theory, with people coming into the business having negotiated up. But then they forget that. Six months, a year or two down the line if that person is still earning more than them and they think they don't deserve it, just because they got a great deal when they joined, then they are pissed off.*

Peter: HR and LM, ConstructionCo

Peter was the only individual to express this temporal effect on co-worker's perceptions of ex-ante financial i-deals, so it was not a strong theme to emerge from the data. Nevertheless, it flags

the potential for co-worker acceptance of ex-ante financial i-deals to be only short-term, or in fact for co-workers' acceptance of i-deals generally to change over time.

The findings related to co-workers' assessments of financial i-deals are illustrated in the decision tree shown in Figure 8.2.

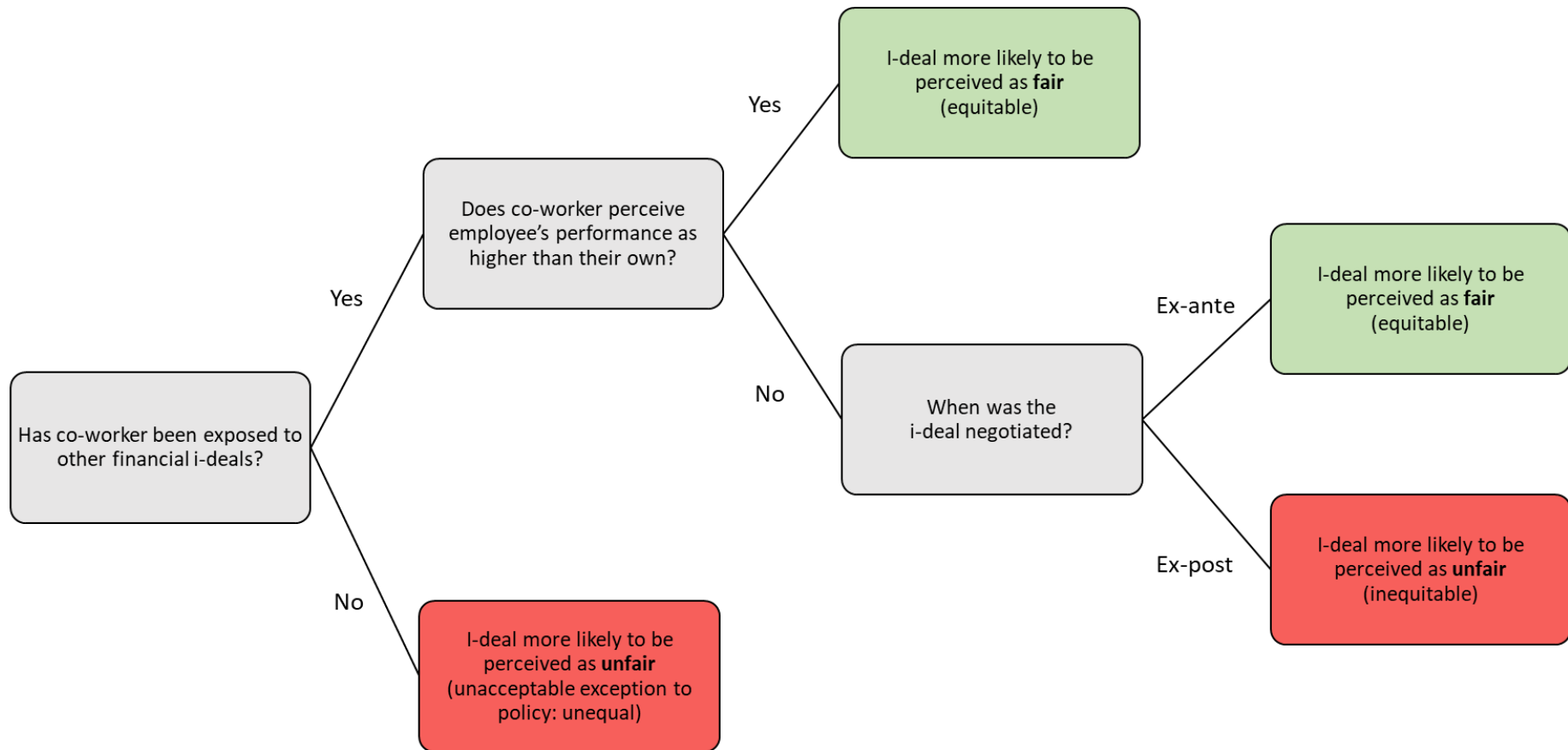


Figure 8.2. Decision tree illustrating co-worker assessments of financial i-deals (except arrangements negotiating holiday allowance) as fair or unfair.

As with assessments of flexibility i-deals, these findings can be dissected to provide insight into not only why but also how co-workers assessed the fairness of financial i-deals. In considering *why* co-workers assess financial i-deals as fair or unfair, and mirroring the findings related to flexibility i-deals, it is revealed that exposure to financial i-deals was leading to co-workers becoming more accepting of these exceptions to organisational policy. Having been exposed to financial i-deals, co-workers were predominantly adopting the (distributive justice) criterion of *equity* for assessing their fair allocation. Financial i-deals were found to be assessed as internally equitable by co-workers when they considered the employee to have earned the exceptional terms of the arrangement through high performance. As for *how* co-workers assess the equity of financial i-deals, the findings suggest co-workers use social comparisons to decide whether an employee's (perceived) performance is comparatively higher than their own. Co-workers may rely upon their own observations of an employee's performance when making these social comparisons and do not have access to other information (which may be considered private) related to the employee's i-deal.

However, the findings also revealed an exception to co-workers becoming more accepting of financial i-deals through exposure, and their assessments of the arrangements against the distributive justice criterion of equity. Some co-workers expressed a preference for holiday entitlement to be allocated equally and described i-deals allowing for the negotiation of this benefit as unfair. This finding highlights that the specific resource offered by an i-deal influences the criteria co-workers use to assess that arrangement as fair.

### 8.3. *Summary of findings*

Considered together, the findings in this chapter demonstrate why and how co-workers assess flexibility and financial i-deals as fair or unfair. Starting with why co-workers assess i-deals as (un)fair, when first encountering i-deals, co-workers may judge these arrangements as inherently unfair exceptions to policy. However, through exposure to i-deals they can become more open to their creation and instead adopt specific criteria for assessing their fairness. The findings also shed light on what constitutes a flexibility i-deal as *needed* and a financial i-deal as *equitable* in the eyes of co-workers. The tendency for co-workers to judge the fairness of flexibility i-deals against the distributive justice principle of need, and financial i-deals against that of equity suggests the criteria adopted by co-workers for assessing i-deal fairness is driven by the resource offered via the arrangement. This suggestion is further reinforced by the finding that i-deals offering employees additional holiday allowance were being assessed against equality principles and were therefore considered unfair by co-workers. Although such an i-deal may be categorised as

financial by the literature, the specific resources on offer via the arrangement may lead co-workers to assess its fairness against a different criterion to i-deals pertaining to pay or other benefits.

Different influences and information that inform co-workers' assessments of flexibility and financial i-deals provide insight into *how* third parties assess these arrangements as fair or unfair. Different influences exist not only between flexibility and financial i-deals, but in the case of flexibility i-deals also due to the perceived reason the arrangement has been requested. Co-workers' assessments of flexibility i-deals that are considered to reduce work/personal-life conflicts are guided by commonly shared understandings that these arrangements are needed (and therefore fair). However, if a flexibility i-deal is understood by co-workers to bring benefits to the employee (rather than reduce conflicts) these shared understandings do not apply and co-workers rely on their personal experiences to assess the need of the arrangement. Because of the influence of shared understandings and shared experiences on co-worker assessments of whether flexibility i-deals are needed, knowing why an employee has requested a flexibility i-deal informs co-workers' assessments of the arrangement as fair. In contrast, co-workers assess whether (most) financial i-deals are internally equitable based on the perceived performance of the employee. Co-workers rely on their own observations of the employee's performance to carry out social comparisons and decide whether the arrangement is warranted by (comparatively) high performance.

Finally, the timing of i-deal negotiation may influence co-worker assessments of financial i-deals but not flexibility i-deals. Ex-ante negotiation of financial i-deals was generally described as more acceptable than ex-post negotiation because the increased leverage afforded to candidates by the recruitment market increases the (external) equity of ex-ante financial i-deals. However, the timing of negotiation does not influence whether co-workers consider flexibility i-deals to be needed by the employee.

In the next chapter, these findings are developed theoretically and considered in line with our understanding from the i-deals literature, organisational justice theory and social resource theory.



## 9. Discussion - Co-worker adoption and assessment of criteria for evaluating i-deal fairness

The findings in response to research question three support our understanding of why and how co-workers assess i-deals as fair or unfair. Despite acknowledgement that third-party judgements are key to the successful functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), the co-worker perspective has been relatively overlooked by empirical investigations into i-deals (Liao et al. 2016). By collecting qualitative data from co-workers (in addition to employees, line managers and HR representatives) this research helps build a deeper understanding than has been gained to date of co-workers' evaluations of i-deal fairness. Integrating organisational justice theory with social resource theory (SRT) and social comparison theory, the research supports understanding of co-workers' adoption of and assessment against socially acceptable criteria for judging the fairness of i-deals.

To support a holistic understanding of co-worker assessments of i-deal fairness, the chapter starts by proposing conceptual models of fair flexibility and financial i-deals in the eyes of co-workers, based on the research findings. These conceptual models detail co-workers' adoption of and assessment against specific socially acceptable criteria for evaluating i-deal fairness. Next, the chapter undertakes a more detailed theoretical interrogation of each of the components of these models. Based on the findings that highlight *why* co-workers assess i-deals as fair or unfair, the chapter considers co-workers' adoption of criteria for assessing i-deal fairness. This discussion is first focused on co-workers' initial evaluations of i-deals as unfair exceptions to organisational policy, in breach of equality principles. Yet, through increased exposure to fair i-deals co-workers can become more open to the creation of these arrangements and adopt socially acceptable (cf. Fu et al. 2020) criteria for assessing the distributive justice of i-deals. The chapter then explicates these socially acceptable criteria (need and equity) that co-workers adopt for assessing i-deal fairness, which differ dependent on the resources offered by the arrangement. These discussions are supported by existing integrations between SRT and organisational justice theory. Next, the chapter moves on to consider co-workers' assessments of i-deals against these socially acceptable criteria, based on the findings revealing *how* co-workers assess flexibility and financial i-deals as fair. The influences and information found to inform co-workers' assessments of each type of i-deal are examined, revealing the role of shared understandings and experiences in assessing an employee's *need* for a flexibility i-deal, and social comparisons for determining the *equity* of financial i-deals. As part of these discussions, the potential role of interactional justice in co-

worker evaluations of i-deal fairness is considered. The timing of i-deal negotiation (ex-ante versus ex-post) is then discussed as an influence on co-workers' fairness assessments of financial but not flexibility i-deals. Before closing off the chapter with practical implications and limitations, the findings are briefly considered against those in response to research questions one and two (discussed in Chapters 6 and 7). Potential avenues for future research are presented throughout the chapter as they become relevant.

### 9.1. *Fair flexibility and financial i-deals in the eyes of co-workers*

Theoretical abstraction of the findings outlined in Chapter 8 has led to the proposition of two theoretical models of fair i-deals in the eyes of co-workers. These models illustrate co-workers' adoption of and assessment against socially acceptable criteria for evaluating flexibility and financial i-deals as fair. Figure 9.1 illustrates co-worker evaluations of fair flexibility i-deals. Starting with co-workers' *adoption* of socially acceptable fairness criteria, when co-workers first encounter flexibility i-deals they may judge these arrangements as unfair exceptions to policy, in breach of equality principles. However, when they have been consistently exposed to fairly distributed flexibility i-deals, they instead adopt socially acceptable criteria for assessing whether a flexibility i-deal is (distributively) fair, rather than viewing all such arrangements as inherently unequal and unfair. The socially acceptable criteria adopted by co-workers when assessing i-deal fairness are dependent on their perceptions of the nature of the resource offered by the arrangement. In the case of flexibility i-deals, the criterion adopted by co-workers to assess (distributive) fairness is that of *need*: arrangements that are considered to be needed are more likely to be considered fair and accepted by co-workers. This is influenced by co-workers perceiving flexibility i-deals to offer the employee organisational (or line manager) support, which falls within the SRT category of "love" (Törnblom et al. 1985, see section 9.2.b). Turning to co-workers' *assessments* of flexibility i-deals as needed, the model proposes that when co-workers believe the arrangement reduces conflicts between the employee's work and personal life, they assess the i-deals as needed (and fair) via culturally integrated shared understandings of what constitutes needing such an arrangement. When an i-deal is not perceived as reducing work/personal-life conflicts but as bringing benefits to the employee, a co-worker's identification with the employee through shared personal experiences of why the arrangement has been created can also influence whether they assess the i-deal as fair. As such, knowing why an employee has requested a flexibility i-deal supports co-worker assessments of whether the arrangement is needed and, therefore, fair.

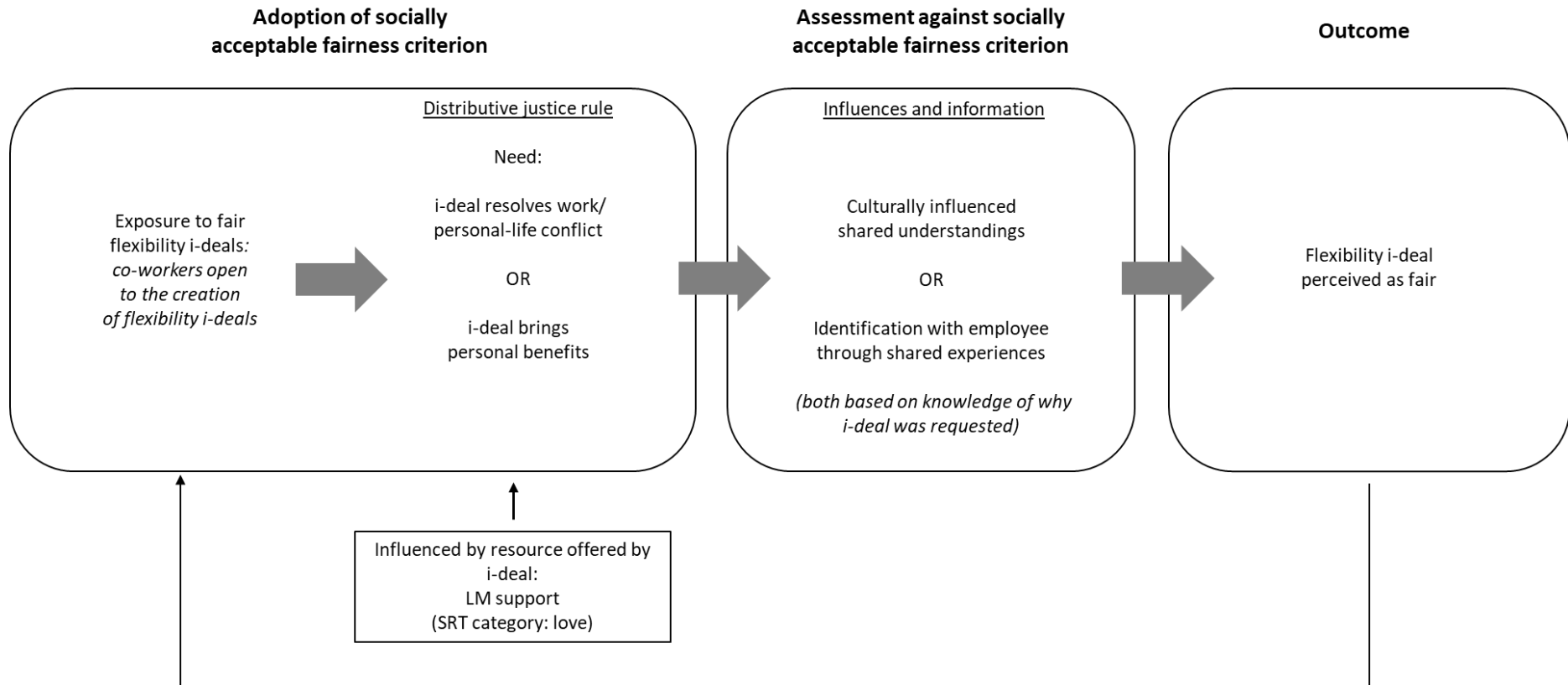


Figure 9.1. Conceptual model of fair flexibility i-deals in the eyes of co-workers.

Figure 9.2 depicts co-worker evaluations of fair financial i-deals. As with flexibility i-deals, when co-workers first encounter such arrangements, they may judge them as unequal and unfair, but through consistent exposure to fairly distributed financial i-deals, they adopt a socially acceptable criterion for assessing the fairness of these i-deals instead. Financial i-deals are mostly perceived by co-workers as offering money or goods to employees, and consequently the socially acceptable criterion adopted to assess their fairness is that of equity (van Kreveland and van Beemen 1978; Törnblom et al. 1985, see section 9.2.b), represented through high performance. To assess the equity of a financial i-deal, co-workers engage in social comparisons of the employee's performance versus their own. Financial i-deals are considered fair when through these social comparisons, co-workers evaluate the employee's comparatively high performance to warrant increased pay/benefits and thus the creation of the financial i-deal. To make these social comparisons for assessing i-deal equity, co-workers simply rely on their personal observations of the employee and their performance. Unlike flexibility i-deals, co-workers' assessments of financial i-deals may also be influenced by the timing of i-deal negotiation (ex-ante versus ex-post). Recognising the leverage afforded to employees during the recruitment process, co-workers may be more likely to accept financial i-deals as (externally) equitable if they are negotiated ex-ante.

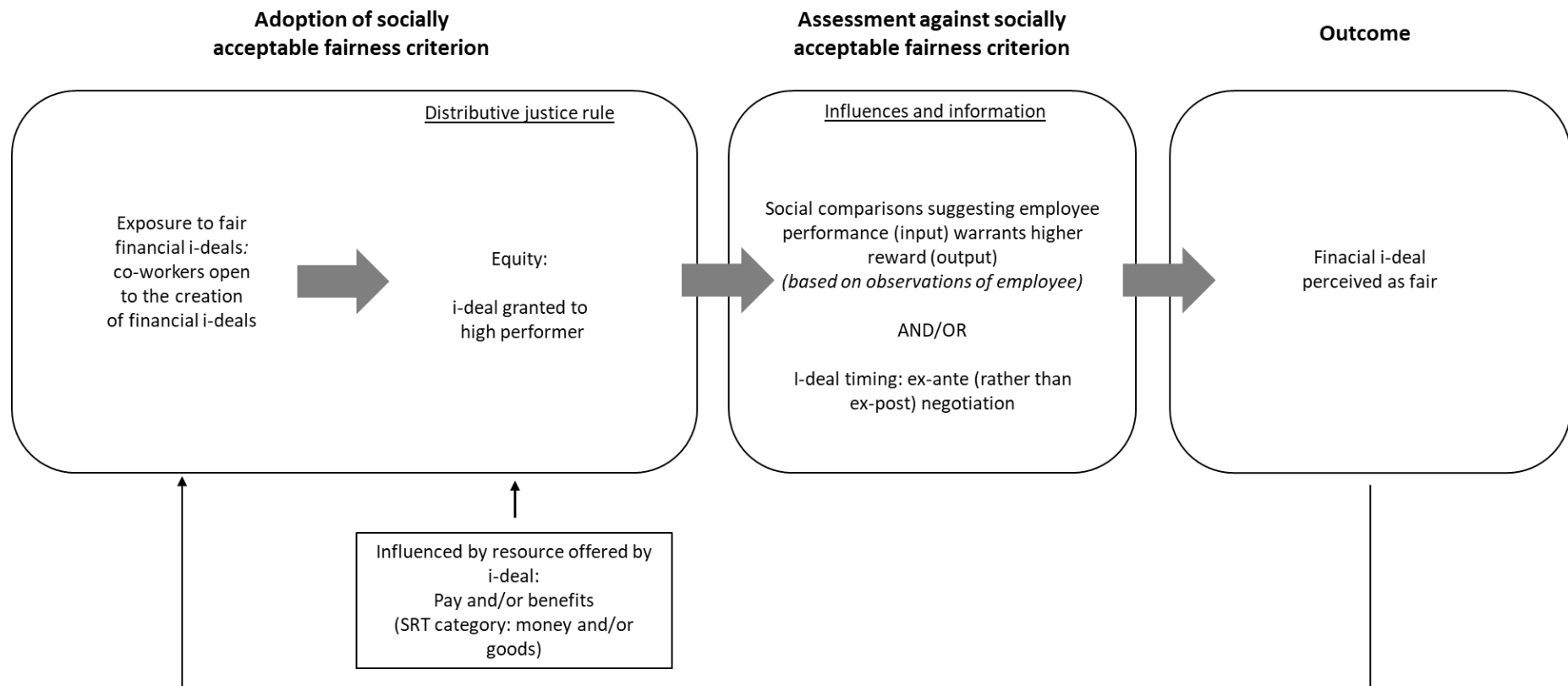


Figure 9.2. Conceptual model of fair financial i-deals in the eyes of co-workers.

However, Figure 9.2 does not capture co-workers' assessments of financial i-deals that offer additional annual leave entitlement (holiday days) to employees. Such i-deals offer the negotiation of an employee benefit (paid days off work) and may be viewed by employers, and categorised by the literature, as financial i-deals. However, the findings suggest such i-deals are not viewed by co-workers as offering money or goods, and that consequently co-workers are unaccepting of these arrangements being allocated based on equity principles. These findings highlight how co-workers' perceptions of the resources offered by an i-deal can differ from employer perceptions, leading to co-workers concluding that the arrangement is unfair (see section 9.3.b for further discussion).

Next, the chapter will interrogate the findings that inform these models in more detail, considering how they support, challenge and extend our existing understanding of co-worker perceptions of i-deals. The research findings suggest that co-workers are mainly concerned with the fairness of i-deals as outcomes (their creation/distribution). Consequently, this chapter predominantly focuses on the distributive justice of i-deals, by considering co-workers' adoption and assessment of specific distributive justice principles as the socially acceptable criteria for assessing i-deal fairness. There is also some empirical evidence to suggest interactional justice plays a role in contributing to co-workers' assessments of i-deals (discussed in sections 9.3.a and 9.3.b). Only a very small amount of data emerged suggesting procedural justice concerns are relevant to co-worker assessments of i-deal fairness, so while this has not been included in the substantive research findings, this is discussed as a limitation and an avenue for future research at the end of this chapter (see section 9.6).

## *9.2. Co-worker adoption of socially acceptable fairness criteria*

Turning to co-workers' adoption of socially acceptable criteria for assessing i-deal fairness, the following sections consider theoretically 1) the impact of co-workers' exposure to i-deals, and 2) the socially acceptable fairness criteria adopted dependent on the resource offered by the arrangements.

### *9.2.a. Exposure to i-deals and co-worker perceptions of i-deal fairness*

The findings reveal that when co-workers first encounter flexibility and financial i-deals, they are likely to view these arrangements as unfair. These findings suggest that initially co-workers are judging i-deals against the principle of equality, one of the established distributive justice allocation rules (Deutsch 1975, see section 3.1.a). In the context of this research, equality is represented by standardised organisational policies and practices that co-workers consider to

apply to all employees. I-deals - idiosyncratic in nature - inherently breach these standardised practices. However, through exposure to flexibility and financial i-deals, co-workers can become more accepting of them and adopt new criteria for the fair assessment of these arrangements: *need* for flexibility ideals, and *equity* for financial i-deals (discussed further in section 9.2.b). While i-deals will inherently fail to meet *equality* as a criterion for fairness, through adopting these new criteria there is potential for these individualised arrangements to be assessed as fair. This is supported by Fu et al. (2020), who suggest that individualised approaches to HRM (i-deals in this case) are perceived as fair as long as these practices are applied using socially acceptable criteria. Socially acceptable criteria are the widely agreed upon conditions that employees must meet when requesting i-deals in order for the arrangements to be viewed as justifying differential treatment (Fu et al. 2020).

Nevertheless, the suggestion by Fu et al. (2020) that individualised HRM practices may be considered fair when allocated against socially acceptable criteria, indicates that exposure to any i-deals will not be sufficient to change co-worker perceptions that these arrangements are unfair. Instead, it is consistent exposure to i-deals that are allocated against socially acceptable criteria that would lead co-workers to adopt those same socially acceptable criteria for their own assessments of i-deal fairness (rather than viewing i-deals as inherently unfair). Future research should explore the consequences of co-workers being exposed to i-deals allocated by employers against inconsistent criteria and of varying (perceived) fairness, in order to determine how these scenarios affect co-worker perceptions of i-deals.

This research is the first to reveal the potential impact of exposure to i-deals on co-worker perceptions of these arrangements. This raises questions as to how and why exposure to i-deals impacts upon their perceived fairness: an exciting avenue for future research to explore further. For example, it remains unclear whether the effect of consistent exposure to fair i-deals is temporal, leading co-workers to become more open to i-deals over time, or whether it is the frequency of i-deals encountered that has an effect. Does exposure to exceptions to policy, as represented by i-deals, truly lead to increased acceptance or does familiarity actually breed a lack of contempt, with co-workers becoming numb or complacent around these outcomes previously perceived as unjust? Clarifying the exact nature of this process, whereby exposure to i-deals can increase acceptance of them is an important avenue for further research so that a more comprehensive understanding of co-worker perceptions and responses to i-deals can be gained.

As well as understanding how this change occurs, the motivation(s) or prompt(s) for this change should also be considered. The findings suggest that one reason co-workers may become more

accepting of i-deals is because observing these arrangements highlights the potential for them to negotiate their own i-deal. Co-workers' acceptance and perceptions of i-deals as fair have previously been linked to their beliefs that they can obtain their own similar arrangement (Rousseau et al. 2006; Lai et al. 2009) and this could be a motivator for them to adopt a new distributive justice criterion when assessing the fairness of a particular type of i-deal. Should this be the case, co-workers' adoption of new criteria for assessing i-deals as fair would be motivated by their own self-interest: an influencing factor on distributive justice perceptions previously identified within literature (Lerner and Clayton 2011). It is in a co-worker's interest to view an i-deal as fair if they have come to desire a similar arrangement for themselves (either now or at a potential later date). If co-workers come to believe that it is socially acceptable for flexibility i-deals to be distributed on a needs basis, that allows them to fairly negotiate their own arrangement that will be accepted by others should they need it (in the present or future). The same is true of financial i-deals: if these arrangements can be fair when allocated equitably, based on high performance, it provides co-workers the opportunity to fairly negotiate for their own financial i-deal should their performance warrant it.

Other prompts or motivations may also be influencing co-workers and encouraging them to adopt new criteria for assessing i-deal fairness as they become exposed to these arrangements. Exposure to i-deals may provide co-workers with more information on the creation of i-deals and provide them with a better understanding of why employees and employers might create them. For example, exposure to flexibility i-deals may lead co-workers to better understand the potential *need* for such an arrangement. Plus, as co-workers become exposed to i-deals, they may start to associate the arrangements with their context and integrate their existence into their own nuanced understanding of the organisational culture and what outcomes are acceptable within that environment. In this regard, it may not only be exposure to the i-deals themselves that leads co-workers to become more open to the arrangements, but also exposure to other colleagues' reactions to i-deals. As co-workers observe how others react to the creation of certain types of i-deal, they learn the socially accepted rules for allocating these arrangements and a desire to fit in with those around them could lead them to adopt these criteria as their own.

These findings also have implications for understanding co-worker reactions to denied i-deals. Co-workers with little exposure to i-deals may believe that denying employee requests for them is fair as the arrangements breach organisational policy. However, co-workers who've been exposed to particular types of i-deal may consider the *denial* of an i-deal request unfair if they believe that arrangement met socially acceptable fairness criteria. Future research should seek to enhance



understanding of how co-workers interact with denied i-deals by exploring the impact of unfairly (in their eyes) denied requests on their subsequent attitudes (e.g., perceived organisational support) and behaviours (e.g., role performance or the likelihood of them requesting an i-deal in the future).

Increased co-worker acceptance of i-deals through exposure has positive implications for perceptions of flexibility i-deals. As discussed in the descriptive findings (see section 5.2.b), flexibility i-deals are generally visible to and observable by others, meaning that over time co-workers are likely to gain exposure to any flexibility i-deals that are created. Consequently, feelings of fairness and acceptance of these arrangements may increase, both by individuals and generally across organisations, as long as these i-deals have been consistently granted in line with socially acceptable allocation criteria. In contrast, the implications of these findings for the acceptance and perceived fairness of financial i-deals (which are not as visible to co-workers, see section 5.2.b) are less positive. Co-workers are less likely to observe financial i-deals that are created, and this may keep exposure to these types of arrangement low. Consequently, co-workers are less likely to be prompted to adopt socially acceptable criteria for financial i-deal distribution, and they will continue to assess these arrangements against equality principles and consider them inherently unfair. Furthermore, given interviewee descriptions that pay is not openly discussed within the case organisations, financial i-deals may be more likely to be kept secret from co-workers. Previous work has already highlighted the likelihood of individual i-deals being perceived as unfair if they were created in secret, because it raises suspicion that there is something to hide about the arrangement (Rousseau et al. 2006). These findings extend our understanding by revealing that even if specific i-deals remain a secret and are not discovered by co-workers, this secrecy can still have negative consequences by contributing to co-worker exposure to these arrangements remaining low, and them assessing other similar i-deals as unfair.

*9.2.b. The adoption of need versus equity for assessing i-deal fairness: the nature of the resources offered by flexibility and financial i-deals*

Having established that exposure to i-deals can lead to co-workers adopting socially acceptable criteria for assessing i-deal fairness, the chapter now moves on to discuss why *need* is adopted as the fairness criterion for flexibility i-deals, and *equity* for financial i-deals. These criteria align to well-established distributive justice allocation principles (Deutsch 1975, see section 3.1.a) and their adoption is influenced by the resources co-workers perceive i-deals to offer employees. However, co-worker perceptions of the resources offered by i-deals can differ from their employer's, leading to disagreement as to how the arrangements should be fairly allocated.

Further, the findings extend upon existing research by revealing how i-deals can meet the criteria that co-workers adopt for assessing i-deal fairness, or in other words, what constitutes needing a flexibility i-deal and constitutes a financial i-deal as equitable in the eyes of co-workers.

Starting with flexibility i-deals, the findings show that co-workers consider the extent to which these arrangements are needed: flexibility i-deals viewed as needed were described as more appropriate, fair, and accepted by co-workers. Need is an established distributive justice allocation principle, and SRT helps to explain its adoption by co-workers as the socially acceptable criterion for assessing flexibility i-deals. Flexibility i-deals are perceived by co-workers as offering employees their line manager's (LM's)/organisation's support. This support allows employees to alter their working schedule and/or location. As such, the resource provided by these arrangements falls within the social resource category of "love" (Foa and Foa 1974; 1980, see section 3.2). As discussed in section 7.4, as a particularistic resource previous theorising has suggested people prefer for love to be allocated equally or in accordance with need (Törnblom et al. 1985). Given that i-deals are inherently individualised and unequal, need is the most appropriate allocation principle in this context.

These findings align to those of Marescaux and De Winne (2016), who found co-workers to be predominantly concerned with an employee's need for a flexibility i-deal. They also extend upon Marescaux and De Winne's (2016) work by revealing what co-workers believe constitutes needing a flexibility i-deal. This research suggests that co-workers widely (but potentially not universally) consider flexibility i-deals to be needed when they reduce conflicts in an employee's work/personal-life. In contrast, whether i-deals that bring benefits to employees are considered to be needed differs from co-worker to co-worker. As such, the influences on co-worker assessments of conflict reducing versus benefit bringing flexibility i-deals differ (discussed further below in section 9.3.a).

That it is the nature of the resource on offer via an i-deal that influences the socially acceptable criterion adopted for assessing its fairness, could suggest that employers may be limited in their ability to influence co-workers' assessment of these i-deals against principles of need. That is, it is unlikely that employers can alter how co-workers perceive the nature of the resources offered by flexibility i-deals. However, as highlighted above, this research contributes to existing understanding by highlighting what constitutes needing a flexibility i-deal in the eyes of (co-)workers, and this understanding may be amenable to influence. Should it be possible to broaden the scenarios in which co-workers assess flexibility i-deals as needed, this would allow more employees to benefit from flexibility i-deals without risking negative reactions from co-workers. It

would also allow employers to even further reap the benefits of broadly distributed i-deals (discussed in Chapter 7) without repercussions from third parties. Future research should consider whether and how framing the communication of flexibility i-deals to co-workers is beneficial to this end. Given the findings by this research that flexibility i-deals which reduce work/personal-life conflicts are considered needed by co-workers, should the narrative around the creation of flexibility i-deals focus on the balancing of work and personal-life demands, in order to be accepted by co-workers? For example, if an employee requests an i-deal to take part in a particular hobby, are co-workers more likely to assess the arrangement as fair if it is communicated as accommodating engagement in activities that support combatting work pressures, or that help maintain health and wellbeing? It would also be beneficial if employers are able to influence and broaden co-worker perceptions of what constitutes needing a flexibility i-deal to beyond reducing conflicts in an employee's work/personal life. Further consideration of how such an outcome may be achieved is picked up in section 9.3.a, as this discussion is supported by understanding of the influences and information that inform co-workers' assessments of flexibility i-deals.

As for financial i-deals, the research suggests that co-workers judge these arrangements using the distributive justice principle of equity: they assess whether a financial i-deal is warranted by high performance. That co-workers engage in social comparisons to assess the fairness of financial i-deals (see section 9.3.b) indicates that they are predominantly concerned with the internal equity of these arrangements. However, co-workers' recognition of the leverage afforded to employees during recruitment negotiations suggests they may also take into account external equity when assessing the fairness of ex-ante financial i-deals (discussed further in section 9.3.c). Given that financial i-deals tend to offer employees money or goods, the application of equity as a rule for their fair allocation is explained by previous work showing a preference for money and goods to be distributed equitably due to their universalistic (Törnblom et al. 1985) and concrete (van Kreveld and van Beemen 1978) natures, respectively.

Again, these findings align to that of Marescaux and De Winne (2016) who found that co-workers predominantly judge the equity of financial i-deals. However, an identified exception to this general trend demonstrates how this research extends upon our existing understanding. An example of a financial i-deal that co-workers did not appear to judge against the principle of equity emerged from the findings. This exception occurred in both case organisations and related to i-deals whereby additional annual leave entitlement (holiday days) had been negotiated. Unlike most other financial i-deals, the findings indicate that co-workers were strongly opposed to

additional time off being awarded via the allocation principle of equity and tended to describe i-deals related to annual leave as unfair regardless of the rationale behind their formation. Interviewees at InsuranceCo also went on to describe the formal organisational approach (whereby annual leave entitlement is based on job grade) as unfair, stating that annual leave should not be allocated according to status or hierarchy (which are other approaches to equitable distribution). These findings indicate a preference for annual leave to be offered via the distributive justice principle of equality. Thus, any i-deal related to this benefit will be perceived as unfair by co-workers given that i-deals are by nature idiosyncratic and personalised. This finding reveals that in the case of i-deals offering additional annual leave entitlement, co-workers may not adopt any criterion other than equality for assessing the fairness of these arrangements, even if they are consistently exposed to them being allocated in line with different principles. As such, the research suggests that equality may in fact be the socially accepted principle for the allocation of this particular benefit.

In order to explain this anomalous finding, it is necessary to consider how holiday entitlement may differ as a resource to other financial i-deals. At InsuranceCo, but not ConstructionCo, employees have the option to buy and sell holiday as part of the company benefits package. Furthermore, upon employment terminating at both case organisations, employees may have a sum equivalent to their outstanding/overtaken holiday entitlement paid to or deducted from them (based on a day of annual leave being valued at the rate of a day's pay). These organisational processes suggest that employers view annual leave as a benefit with a monetary value. However, (co-)worker explanations focused on holiday as an opportunity to rest, recuperate and take time away from work, suggesting they perceive annual leave days to be offered as a form of employer support (categorised as "love" by SRT, see section 3.2). Due to this difference in how employers and co-workers perceive holiday entitlement as a resource, they appear to differ in their opinion of how it should be fairly allocated in comparison to other benefits (and financial i-deals). While employers allocate it via equity principles in line with their approach for other financial i-deals, co-workers believe holiday entitlement should be allocated equally and oppose the creation of i-deals offering this resource.

This particular finding demonstrates that while holiday entitlement might be labelled or described as an employee benefit, this does not mean the resource on offer has the same meaning to (co-)workers as other benefits. The potentially problematic nature of categorising i-deals related to annual leave entitlement as a financial i-deal is therefore highlighted. Even though financial i-deals are described as relating to both pay and benefits (Liao et al. 2016), and despite

interviewees representing all perspectives describing holiday entitlement as a benefit, (co-)workers do not appear to view it as a monetary resource. This difference in perception may be affecting the findings of research examining financial i-deals and muddying the theoretical waters in relation to these arrangements which are, as indicated in their name, presumed to be financial in nature. As such, the importance of conducting research and exploring organisational constructs from multiple perspectives is reinforced (cf. Troth and Guest 2019). It is demonstrated here that different organisational stakeholders may not just hold different attitudes towards the exchange of certain resources in organisations, but may even dispute the very nature of those resources (monetary versus love/support).

Of note, even though co-workers appear to perceive flexibility i-deals and i-deals related to holiday entitlement as containing similar resources (employer support/love) the findings suggest they adopt different criteria when assessing the fairness of these arrangements. For flexibility i-deals, it has been suggested that *need* is the socially acceptable criterion upon which co-workers base their fairness assessments, as the principle of equality is inapplicable to i-deals. However, for i-deals related to holiday entitlement, co-workers demonstrate a preference for employer support (love) to be allocated equally, leading them to reject i-deals of this nature all together rather than turning to the principle of need as an alternative criterion. There are a number of potential explanations for this difference. One relates to the reason why employer support is being provided in these different scenarios, and whether alternative options are available to the employer. Annual leave is provided to employees in support of the demands of their job: something co-workers are likely to perceive as within the control of the employer. If an individual is perceived to be under additional or excess strain as a result of that job, a co-worker may consider it the responsibility of the employer to reduce or control that strain through other methods rather than providing the employee with additional annual leave. Consequently, even if an employee needs additional employer support, time off through annual leave can continue to be allocated equally. In contrast, flexibility i-deals are created in response to demands in an individual's personal life: demands that co-workers know the employer is unlikely to have control over or have alternative methods for supporting. In this instance, co-workers are more likely to perceive it as acceptable to take that *need* into account when allocating resources.

A second potential explanation considers the consequences of offering support through these two different arrangements. Adjustments to employee salary are (presumed to be) associated with flexibility i-deals that reduce hours, but not i-deals offering additional holiday entitlement. Flexibility i-deals that compress working hours or support homeworking do not (at least not

contractually) change the number of hours worked by an employee. For flexibility i-deals that decrease contractual working hours, there was no discussion by co-workers of the financial terms of the agreement. It may be presumed by co-workers that flexibility i-deals that reduce working hours are accompanied by a respective salary adjustment, removing any financial gain from the i-deal. In contrast, additional annual leave entitlement may be considered to be reducing an employee's working time without a salary adjustment. Given that co-workers describe annual leave as supportive in nature, they may oppose the financial element that comes into play when holiday is not distributed equally. In comparison, because it is presumed that pay is pro-rated for flexibility i-deals, removing any financial benefits from these arrangements, co-workers are more comfortable with these arrangements being distributed based on need rather than equality principles. Nevertheless, it is possible that i-deals are multifaceted, combining both flexibility and financial elements (e.g., they could lead to a reduction in working hours but not a reduction in salary). In such a scenario, co-workers may be less aware of the financial than flexibility component of the i-deal. As this scenario was not raised by co-workers, and it was not the intention of this study to highlight potential i-deals that co-workers were not aware of (see section 4.8), co-worker attitudes towards i-deals of this multifaceted nature were not explored by this research. However, understanding co-worker assessments of multifaceted i-deals containing different resources is an important avenue for future research (see section 12.2.d) given that a defining feature of i-deals is that they can vary in scope (Rousseau et al. 2006; Bal and Jansen 2015; Conway and Coyle-Shapiro 2016; Liao et al. 2016; Bal 2017).

Previous studies have explored the co-worker perspective of i-deals through the lens of organisational justice theory (e.g., Greenberg et al. 2004; Lai et al. 2009; Marescaux et al. 2019). However, the majority have only focused on equity as a criterion for distributive justice and not considered how different types of i-deal, offering different resources to employees, may be assessed by co-workers against different distributive justice criteria. Marescaux and De Winne (2016) are the single exception by exploring co-workers use of different distributive justice allocation principles for their assessments of different types of i-deal. Through qualitative exploratory methods, this research extends upon and provides nuance to the findings of Marescaux and De Winne (2016) by revealing how i-deals can meet the allocation criteria adopted by co-workers, and that different i-deal stakeholders may perceive the resources offered by i-deals differently. Thus, this research once again highlights the importance of exploring i-deals from multiple perspectives in order to understand the consequences of these arrangements. Plus, it highlights the need for researchers and practitioners to be alive to these potential differences in

perspectives when trying to anticipate how the formation of i-deals may be perceived by third parties.

Recent publications have broadened their theoretical approach to examining the co-worker perspective on i-deals, stating that factors other than perceived fairness should be considered (Marescaux et al. 2021) and the predominant focus on fairness to date may have led to the limited number of outcomes thus far associated with co-worker reactions to i-deals (Garg and Fulmer 2017). While the benefits of exploring co-worker perceptions of i-deals through other theoretical lenses is not contested, this research demonstrates that our understanding of why and how co-workers perceive i-deals as fair has not been comprehensive to date, and that existing examinations have often been unnecessarily limited to considerations of equity. Reiterating the relevance of justice, beyond considerations of equity, to co-worker perceptions of i-deals, broadens the possible outcomes of co-worker reactions to i-deals for research to explore moving forward. Furthermore, Marescaux et al. (2021) themselves comment that in order to optimise i-deal outcomes, organisations could focus on ensuring the fairness of the i-deals they create. Thus, reinforcing the importance of integrating the i-deal and organisational justice literatures.

Even beyond the literature integrating i-deals and organisational justice theory, the allocation principle of need has often been empirically overlooked and outcomes have often been presumed to be just when they have been allocated equitably (Rupp et al. 2017). This tendency to overlook need in organisational research may be due to previous suggestions that the need principle is more likely to be applied in welfare-oriented or caring contexts, and the principle of equity is more relevant to and likely to be applied in more competitive or economic contexts (Törnblom and Foa 1983). However, this research reinforces the relevance of need considerations due to the dual nature of contemporary organisations. Increasingly, concerns around corporate social responsibility and being a caring employer are becoming a priority for businesses (CIPD 2013), leading organisations to become not only economic but also welfare-oriented environments. This study, therefore, helps to widen the concept of distributive justice back up beyond merely considerations of equity by reinforcing the relevance of the allocation principle of need (and equality under specific circumstances) for assessing current organisational outcomes.

Furthermore, the findings provide clear evidence of co-workers using all three of the established distributive justice allocation principles (see section 3.1) when evaluating the fairness of financial and flexibility i-deals. Critical reviews of the justice literature have suggested that these principles are overly prioritised at the expense of identifying other influences on distributive justice (Rupp et al. 2017). This research does evidence the potential for other influences, such as self-interest (cf.

Lerner and Clayton 2011), on perceptions of distributive justice. Nevertheless, considerations of equity, need and equality emerged as strong themes from interviewee responses describing what makes i-deals fair or unfair, without specific prompting. Therefore, the findings from this research provide some support for the prevalence of these allocation principles within the organisational justice literature, while also reinforcing the need for research to be open to additional influences.

Having discussed the socially acceptable criteria co-workers adopt to evaluate the fairness of flexibility and financial i-deals, the chapter now moves on to consider their assessments against these criteria.

### *9.3. Co-worker assessments of i-deal fairness: influences and supporting information*

The findings reveal not only why co-workers assess i-deals as fair or unfair but also how they make these assessments: the influences and the information that inform these judgements. This understanding is particularly relevant given that the findings reveal that co-workers do not always agree on their fairness assessments of i-deals, even when assessing the arrangement against the same socially acceptable criteria.

First, the shared understandings and experiences found to influence co-worker assessments of flexibility i-deals are discussed. Next, the social comparisons undertaken by co-workers to evaluate the fairness of financial i-deals are considered. Finally, the influence of i-deal timing on co-worker assessments of financial (but not flexibility i-deals) is examined.

#### *9.3.a. Shared understandings and experiences of needing flexibility i-deals*

The influences on co-workers' assessments of flexibility i-deals may differ dependent on their understanding of why that i-deal has been requested (e.g., to reduce work/personal-life conflicts versus bringing personal benefits). When co-workers believe that flexibility i-deals reduce work/personal-life conflicts, these arrangements are more likely to be perceived as fair. This a shared understanding that, it appears, may be integrated into the organisational culture, and is influencing and informing co-workers' assessments of flexibility i-deals. This shared understanding may be learnt through the same exposure to flexibility i-deals (discussed in section 9.2.a) through which co-workers become more accepting of these arrangements. Through observing how others react to flexibility i-deals and/or adjusting to organisational norms, co-workers may learn and take on these shared understandings of what constitutes needing such an arrangement. Further, that this shared understanding was common to both case organisations may suggest that wider cultural values are influential. Future work should be alive to possible variances in shared



understandings of what constitutes needing a flexibility i-deal across organisations and cultures, and explore how this affects why and how co-workers assess the fairness of i-deals.

However, when co-workers view a flexibility i-deal as bringing personal benefits to an employee, and the arrangement does not align to shared understandings of circumstances constituting need, the i-deal is not inherently considered unfair. In these scenarios, a co-worker's own personal experiences are the basis for their assessments of whether or not a flexibility i-deal is needed. In such scenarios, co-workers are more likely to come to different conclusions regarding the fairness of flexibility i-deals due to the varying nature of their own individual experiences. These findings may be explained by existing research demonstrating that third-party fairness assessments are influenced by their identification with the individual for whom a specific outcome has occurred, and that this identification can increase through shared experiences (Brockner and Greenberg 1990). Further, being more likely to assess a flexibility i-deal as needed (and therefore fair) when a co-worker identifies with an employee, may contribute to explaining previous findings that co-workers are more likely to accept the i-deals of employees with whom they are friends (Lai et al. 2009). This is a potential basis for inconsistency in how co-workers assess the fairness of flexibility i-deals if they are inadvertently more appreciative of a friend's need for such an arrangement, in comparison to the needs of other colleagues in similar circumstances.

Rousseau et al. (2006) suggest that third parties may make judgements regarding i-deals based on incomplete information relating to the arrangement, and that this can lead to co-workers perceiving i-deals negatively. Sharing similar experiences with the i-deal recipient is an indirect way for co-workers to potentially have access to more information regarding an i-deal. A co-worker who is (or has been) in similar circumstances may have insight into that situation, allowing them to fully assess the employee's need for a flexibility i-deal. In contrast, a co-worker who does not share these experiences may not identify with the benefits nor understand its personal importance to the employee, leading them to see the i-deal as unnecessary and an unfair difference in treatment.

The influence of shared understandings and experiences on co-workers' assessments of i-deal fairness may once again be partly explained by co-workers protecting their own self-interest (cf. Lerner and Clayton 2011). A widespread shared understanding that flexibility i-deals that reduce conflict are needed and fair can be reassuring and beneficial for co-workers. If they have or have had their own flexibility i-deal for these reasons, it reinforces their belief that their arrangement is/was fair. Even if co-workers haven't had a flexibility i-deal, this widespread shared understanding gives them confidence that they will be able to negotiate a flexibility i-deal that is

considered fair and accepted by their colleagues should they face their own work/personal-life conflicts in the future. Similarly, by viewing flexibility i-deals that bring benefits to employees as *needed* when they identify with the reason for wanting that arrangement, co-workers are able to believe that an i-deal that they may want for themselves in the future is also fair. In contrast, co-workers viewing flexibility i-deals that bring benefits that they do not identify with, and have no shared experience of, as unfair is of no detriment to them, because they are unlikely to ever desire an arrangement for a similar reason.

Given that co-worker acceptance of i-deals has been identified as key to the successful functioning of these arrangements (Rousseau et al. 2006; 2016), identifying these different influences on co-worker assessments of flexibility i-deals has important theoretical and practical implications (see section 9.5). That co-workers may be less accepting of flexibility i-deals requested for certain reasons risks employers and employees missing out on the benefits of broadly distributed, supportive in nature, flexibility i-deals (see Chapter 7). As previously discussed in section 9.2.b, broadening co-workers' understanding of what constitutes needing a flexibility i-deal would be beneficial for employees and employers. Here, co-workers' assessments of flexibility i-deals as needed and fair have been discussed as being influenced by shared understandings and experiences. Clearly, the sharing of personal experiences between employees with i-deals and co-workers, falls outside the scope of an employer's influence. However, shared understandings of what constitutes needing a flexibility i-deal has been discussed as integrated within an organisation's culture. Employers may therefore be able to use cultural levers to encourage co-worker understanding that flexibility i-deals are needed and fair in the broadest of circumstances. Future research should explore how such cultural levers can be used to achieve this outcome. For example, a combination of HR policies and practices such as employee assistance programmes, career breaks or family-friendly benefits may promote understanding that the organisation is proactive in supporting employee work-life balance in numerous circumstances. Such understanding may even help co-workers to broaden their understanding and acceptance of i-deals as fair when they are perceived as bringing employees benefits, not simply when reducing specific work/personal-life conflicts (e.g., for working parents). A broader interpretation of fair i-deals such as this can even be beneficial to the co-workers themselves, as it may offer up new opportunities for them to request and receive flexibility i-deals that would suit their personal circumstances and be accepted and considered fair by others.

The findings demonstrating the influence of shared understandings and/or experiences on co-worker assessments of i-deals also highlight the potential role of informational and interpersonal

justice in co-workers' evaluations of flexibility i-deals. Sometimes considered to be subtypes of interactional justice (Greenberg 1993; Colquitt et al. 2001), informational and interpersonal justice have not received much attention within the literature relative to distributive and procedural justice (Rupp et al. 2017), yet this research highlights their relevance to contemporary organisational practices. In order to determine whether flexibility i-deals are needed (in line with shared understandings or a co-worker's personal experiences), a co-worker must understand why the arrangement was requested. This understanding relies on accessing background information on the i-deal that a co-worker is unlikely to obtain by simply observing the employee once the i-deal has been negotiated. Instead, understanding why an i-deal has been requested requires explanation, most likely from either the employee or the LM who granted the i-deal. These findings highlight the relevance of early suggestions by Rousseau et al. (2006) that third parties are not privy to the same information as those who have agreed an i-deal. This research suggests that providing explanations of why flexibility i-deals were requested may increase the likelihood that co-workers perceive these arrangements as fair, presuming these explanations align to co-workers' understanding of what constitutes needing an i-deal. In fact, explanations from employees as to why they requested their i-deal may help shared understandings develop of when flexibility i-deals are needed. Even if an employee's reason does not initially align to co-worker perceptions of what constitutes needing a flexibility i-deal, increased information may help co-workers better understand the employee's circumstances and their need for the arrangement. As a component of informational justice is the provision of explanations of why allocation decisions have been made (Colquitt et al. 2001), informational justice appears to support co-workers in assessing the fairness of flexibility i-deals. The potential for employee explanations to help co-workers understand why an i-deal is (un)fair reinforces that justice perceptions are not only tied to formal interactions with authority figures such as LMs, but also relate to everyday encounters between peers (Cropanzano et al. 2011).

However, these findings appear to specifically suggest that the provision of explanations for i-deal allocation decisions supports assessments of distributive fairness, rather than being a justice consideration in and of itself. Theoretical attention has been paid to determining whether distributive, procedural and interactional justice are truly distinct from each other, can be substitutable, or whether procedural and interactional justice merely contribute to perceptions of distributive justice (Rupp et al. 2017, see section 3.1.c). In this case, the findings suggest that understanding why an i-deal has been created allows co-workers to assess whether the arrangement is needed (whether it is distributively just). It is not the provision of the information itself that is being assessed as fair or unfair, which would be the case if co-workers were

considering interactional justice as a distinct dimension. Thus, these findings not only contribute to our understanding of how co-workers make judgements related to i-deals, but also add to the body of empirical work that supports and develops our general understanding of organisational justice.

*9.3.b. Social comparisons of performance for assessing the equity of financial i-deals*

Turning to financial i-deals, the findings reveal that to determine whether the arrangements are equitable, co-workers compare their performance and compensation with the employee's. Co-workers described financial i-deals increasing the employee's compensation as fair and (internally) equitable when the employee's performance was higher than their own, and unfair if it was less or equal to their own. These findings indicate co-workers are making social comparisons when assessing the fairness of financial i-deals, comparing the employee's and their own input-output ratios. Social comparison theory has been foundational to our understanding of distributive justice, highlighting concerns with relative favourability/deprivation when individuals assess the fairness of outcomes (Rupp et al. 2017). Social comparisons have been integrated into our understanding of how individuals make equity judgements (Adams 1965; Colquitt et al. 2001), which explains why they have been found to be relevant to co-worker assessments of financial i-deals assessed against the criterion of equity.

The findings reinforce claims by Rousseau et al. (2016) that the overuse of financial i-deals in place of a market-based compensation system can undercut workplace justice. If financial i-deals are created in response to an employee unhappy with receiving below market pay, the i-deal is more likely to be viewed as unfair as co-workers (also paid below market rates) will not see the arrangement as internally equitable when considered against their own input-output ratio. In fact, a high number of requests for financial i-deals may be an indicator of employee perceptions that their organisation is offering sub-market compensation.

Consequently, in order to be perceived as fair, financial i-deals should only be granted to those who truly contribute and perform above and beyond that of other employees, and not simply used as an approach to retaining employees within a cohort of workers receiving sub-market pay. This recommendation is particularly relevant given the findings highlighting the subjective nature of employee performance and the potential for different co-workers to differently assess performance. Those findings reflect the claims of Garg and Fulmer (2017) who highlight that co-

workers may all judge the performance of employees with i-deals differently, for example focussing on either task or discretionary performance.

Clearly, it is difficult for employers to prevent co-workers reaching varying conclusions about an employee's performance, highlighting the potential risks of granting financial i-deals. Even if all co-workers were to focus on an employee's task performance when assessing the equity of a financial i-deal, the ability to make an objective judgement of performance will differ between job roles. Whereas, for example, performance in sales roles may be possible to more objectively assess, performance in creative roles will be more subjective. In some work contexts where employees work closely together and perform similar tasks, organisations may be taking fewer risks by only granting financial i-deals to employees truly considered to stand out as the highest performers. In such an environment, the potential for co-workers to discover the existence of financial i-deals may be high due to colleagues' proximity to each other. However, their work outputs and performance may be more likely to be comparable and by only granting financial i-deals to the highest performers there may be less dispute over the perceived performance of that individual. In contrast, when employee work outputs are highly individual and colleagues may even frequently work in isolation from each other, employers may feel comforted due to a belief that it is unlikely that any financial i-deals created will be discovered by co-workers. However, creating financial i-deals in these circumstances does not come without risk. Should the arrangements be uncovered, there may be disagreement over the performance of the employee who has been granted the arrangement, leading to co-worker perceptions that the i-deal is inequitable and unfair. Furthermore, granting financial i-deals to the highest performers is complicated when financial i-deals are negotiated ex-ante, leading to employers granting the arrangements based on potential rather than actual performance. That said, co-workers may be more accepting of financial i-deals created ex-ante as they recognise the leverage the recruitment market offers the employee (see section 9.3.c).

Given co-worker concerns with the internal equity of financial i-deals, future research should explore whether and how co-workers take into account other aspects of an employee's contribution when assessing the fairness of these arrangements. While this research revealed co-workers specifically considering comparative performance, organisation-specific experiences and expertise are valuable to organisations (Lepak and Snell 1999) and may also be taken into account when co-workers assess the internal equity of financial i-deals. However, like employee performance, such contributions by employees may not be easily observable or objectively

assessed by others, leading to incongruence between individual co-workers' assessments of financial i-deals.

Unlike flexibility i-deals, the findings did not suggest that co-workers need to understand why a financial i-deal has been requested. Instead, co-workers rely on their observations of the employee when considering whether or not they believe the i-deal is equitable. However, performance (or contribution more generally) is not always easily observed. Plus, performance is only one of two components in the performance-compensation ratio that co-workers are basing their social comparisons on, but the privacy that was found to exist around pay suggests that co-workers may not regularly get access to this second piece of information. Instead, simply the existence of a financial i-deal, representing increased compensation, may be being considered in co-workers' social comparisons. Furthermore, while some of the information (employee performance) required by co-workers to assess whether financial i-deals are equitable may be observable, the very act of considering whether a financial i-deal is fair relies on knowing (or suspecting) that the arrangement exists, and this awareness is not always guaranteed. Consequently, the relevance of informational justice to financial i-deals could be questioned, as while more information about a financial i-deal may help co-workers assess the fairness of these arrangements, the likelihood of receiving this information could be low. Plus, the findings revealing a culture of privacy around pay within the case organisations suggests that co-workers may not even expect to know the details of a peer's compensation package and financial i-deal.

Clearly, trying to manage co-worker responses to or encourage positive co-worker assessments of financial i-deals is challenging in contexts where there is a culture of pay privacy. I-deals that have been attempted to be kept secret but are ultimately discovered have been suggested to lead to co-workers feeling suspicious and paranoid, and those i-deals being less likely to be assessed as fair (Rousseau et al. 2006; 2016). On the other hand, despite the warnings that keeping i-deals secret can have negative consequences (ibid), employers may still be concerned that communicating the existence and details of financial i-deals may encourage more people to request similar arrangements and sets a precedent they would rather avoid. Plus, employees may feel uncomfortable with the details of their financial i-deal being shared, and it has even been suggested by past work that there is a risk that co-workers will perceive employees to be bragging if an i-deal is communicated without tact (Greenberg et al. 2004). Consequently, dependent on the cultural context it may be that interpersonal justice, focused on treating individuals with politeness, dignity and respect (Colquitt et al. 2001), is more relevant to co-worker perceptions of financial i-deals than informational justice. A co-worker's relationship with their LM may be

particularly important as it has been suggested co-workers who trust their manager are more inclined to perceive the i-deals their manager has agreed to as justified (Rousseau et al. 2016). This reflects the role of LMs as intermediaries in employee voice (Townsend 2014), as co-workers who have positive relationships with their LM may feel more confident that their LM has considered and represented their interests when making decisions regarding a specific i-deal. As such, trust in their LM may lead to the co-workers feeling less suspicious and paranoid when they lack information or have not been provided with explanations about an employee's i-deal.

Future research should specifically explore the relationship between financial i-deals and interactional (informational and interpersonal) justice further. Such understanding could support the development of practical recommendations for how LMs can balance concerns over pay privacy and co-worker responses to financial i-deals. In their discussions of i-deals and employee-co-worker-LM relationships, Greenberg et al. (2004) stressed the importance of sharing information with the co-worker. However, this research highlights that such recommendations need to more specifically consider and address balancing this sharing of information with individual expectations of pay privacy, in order to be relevant to the management of financial i-deals in contexts where this will be a concern for employees and co-workers.

### *9.3.c. Co-worker assessments of ex-ante versus ex-post i-deals*

The chapter now moves on to discuss one further influence on co-workers' perceptions of financial (but not flexibility) i-deals: the timing of negotiation. While it was possible for both ex-ante and ex-post financial i-deals to be perceived as fair by co-workers, the timing of i-deal negotiation did emerge from the findings as acting upon co-workers' fairness assessments of these arrangements. The findings suggest that when a financial i-deal is negotiated ex-ante, the likelihood of a co-worker accepting that i-deal and perceiving it as fair is increased (albeit potentially only in the short-term, discussed further below). Co-workers appear to recognise their employer's desire to secure candidates and the leverage this provides to employees during ex-ante financial i-deal negotiations. Consequently, co-workers are more accepting of financial i-deals when negotiated ex-ante versus ex-post, suggesting they acknowledge a market-orientation to these arrangements (as discussed in Chapter 7). This suggests that, despite co-workers seemingly predominant concern with the internal equity of financial i-deals, they do take into account considerations of external equity when negotiation takes place ex-ante. Future research should therefore more specifically explore how co-workers balance considerations of internal equity (based on employee performance/contribution) and external equity (based on market-

value) when assessing the fairness of financial i-deals, and how this differs for ex-ante versus ex-post arrangements.

In contrast, the timing of i-deal negotiation did not appear to influence co-worker perceptions of flexibility i-deals. Unlike the findings discussed in Chapters 6 and 7 that reveal managers may be more reluctant to grant flexibility i-deals ex-ante due to a lack of built-up trust with the employee, co-worker responses suggested they were as open to ex-ante as ex-post flexibility i-deals. They perceived it to be unfair to deny i-deals on the basis of the individual being new to the organisation. Whereas for financial i-deals the leverage provided to employees negotiating ex-ante may make their i-deal more equitable, an employee's perceived need for a flexibility i-deal is unchanged by the timing of the negotiation. As discussed in section 7.2, whereas managers often grant flexibility i-deals to support employees on the basis of need, they may also consider the extent to which they can trust the employee as a condition of their authorisation of the arrangement. However, co-workers - who are unlikely to be responsible for the success or management of the i-deal - appear to be unaffected by these considerations and are less compromising in their assessments of flexibility i-deals as fair or unfair on the basis of the employee needing that arrangement. This suggests co-workers may be critical of ex-ante requests for flexibility i-deals being denied by LMs due to a lack of built-up trust, especially if they consider that arrangement to be needed by the employee.

Given these findings, the research helps to advance our understanding of how the timing of i-deals impacts co-worker acceptance of these arrangements. The findings provide support for the proposition made by Rousseau et al. (2006) that co-workers may accept ex-ante i-deal negotiations that are influenced by market-factors. The tendency within the extant literature to empirically prioritise both the employee perspective and ex-post i-deals (Liao et al. 2016) has resulted in examinations of ex-ante i-deals being limited to date. Here, the timing of i-deals as ex-post and ex-ante is shown to differentially impact co-workers' fairness assessments of i-deals dependant on the content of the arrangement and the criteria co-workers adopt for that purpose. Once again, these findings help to shed light on co-worker attitudes toward denied i-deals by revealing that co-workers do not believe that the timing of i-deal negotiation is a fair reason to decline requests for flexibility i-deals. A potential consequence of co-workers believing flexibility i-deals have been denied for those who need them is that those co-workers come to perceive their employer as less supportive (decreased perceived organisational support).

From the data collected by this study it is not possible to understand the differences in how co-workers react to ex-ante i-deals in the short versus long-term. However, this topic is flagged as an



important avenue for future research, noting the potential for co-worker acceptance of ex-ante financial i-deals to degrade over time. Rosen et al. (2013) previously made calls for research to consider the longer-term effects of i-deals, and Guerrero and Challiol-Jeanblanc (2017) previously determined positive short- but not longer-term outcomes of ex-ante negotiations. Future work should seek to determine if co-worker acceptance of these arrangements is time-bound. For example, given the findings of this research, does co-workers' recognition and tolerance of market-influences on ex-ante financial i-deals fade over time, leading them to be more concerned with the internal equity of these arrangements? Determining that increased co-worker acceptance of ex-ante financial i-deals is only short-term would further reinforce the need for employers to only grant financial i-deals to the highest performers and not to use ex-ante negotiation as a free pass to create i-deals in place of a competitive compensation scheme.

Future research should also consider how the timing of i-deal negotiation impacts upon co-workers' fairness perceptions of developmental and task i-deals (as well as denied requests for these i-deals). Such research should take into account: 1) the nature of the resources offered by these i-deals (from the perspective of workers and employers), 2) the distributive justice allocation criteria by which co-workers assess the arrangements as fair, 3) employer motivation for granting the i-deal, and 4) the nature of the i-deal as a social/relational versus economic/transactional exchange, all of which appear to be potentially relevant to the perceived fairness of ex-ante i-deals. For example, if developmental i-deals are mostly offered to employees who are high performers and in acknowledgement of their potential, perhaps they will be assessed against equity principles and, like financial i-deals, co-workers will be more open to their creation ex-ante. On the other hand, it has been suggested that developmental i-deals are highly relational exchanges (Liao et al. 2016). This could mean developmental i-deals are more supportive in nature and LM's and/or co-workers may be opposed to the equitable distribution of these arrangements, based on performance.

#### *9.4. The formation and functioning of fair and successful i-deals*

When the findings in response to research question three are considered alongside the findings in response to research questions one and two (discussed in Chapters 6 and 7), there are both positive and negative implications for the creation of fair and successful i-deals. It is indicated that co-workers assess the fairness of flexibility and (most) financial i-deals against broadly the same distributive justice criteria as LMs use to grant the arrangements. LMs grant (ex-post) flexibility i-deals in line with employee need, and co-workers assess flexibility i-deals as fair when the arrangements are perceived as needed. LMs' granting of financial i-deals reflect equity principles,

as do co-workers' assessments of the arrangements as fair or unfair. These findings imply that the creation of fair i-deals (as viewed by multiple interested parties) may be possible: an outcome that would be far more challenging if LM and co-worker perceptions of how to appropriately distribute i-deals were not aligned. Consequently, the research demonstrates that i-deals can be examples of individualised HRM that lead to positive outcomes and assessments, when allocated via socially acceptable rules (cf. Fu et al. 2020).

However, the research also warns that (co-)worker and employer interpretation of the resources on offer via i-deals may differ, leading to fundamental disagreement on how those resources should be allocated (discussed above in section 9.3.b). Plus, co-workers' interpretations of what constitutes a financial i-deal as equitable may differ from each other due to the subjective nature of performance. Co-worker interpretations of equitable financial i-deals may also differ from their employer's, given the findings highlight potential incongruence between co-worker concerns with internal equity and an employer focus on external equity. Finally, co-workers' acceptance of flexibility i-deals may be limited to scenarios where the arrangements reduce work/personal-life conflicts, or circumstances where there are shared personal experiences between individual co-workers and the employee. Yet, given the determined benefits of supportive flexibility i-deals (see Chapters 6 and 7), a broader interpretation of needing a flexibility i-deal would be more beneficial for employers and workers. In order to mitigate against each of these concerns, practical recommendations to employers have been detailed throughout this chapter, and are also summarised below.

#### *9.5. Practical implications*

A number of practical implications arise from the research findings outlined and discussed throughout this chapter. For employees, the benefits of proactive and open communication with co-workers around the nature of their i-deal should be considered. In the case of flexibility i-deals, communicating why they requested the arrangement may help co-workers understand the need for the i-deal, especially if framed to emphasise how the arrangement reduces conflicts between the employee's work and personal life (e.g., preserving time to de-stress and maintain mental health) over and above any specific benefits experienced (e.g., enjoying playing golf). Nevertheless, an organisational culture that promotes flexibility i-deals as needed in a wide variety of circumstances may also be needed to support wide co-worker acceptance of arrangements that bring personal benefits rather than only those that reduce common work/personal-life conflicts. While co-workers are alive to concerns for privacy around employment terms, especially with regards to pay, and the communication of these details is not

necessarily expected, the sharing of information that the employee is comfortable with may contribute to co-workers perceiving the i-deal as fair because information is not being hidden from them. Employees sharing relevant information regarding their i-deal to co-workers may help prevent them from experiencing some of the negative consequences that have been proposed when co-workers perceive i-deals as unfair, for example, social undermining of the employee (Marescaux et al. 2021), and complaining behaviour to which LMs may concede (Marescaux et al. 2019). The importance of open communication with co-workers is also relevant to LMs. The LM is another source from which information on an i-deal and/or the decision-making process leading to its creation can be shared. During i-deal negotiations, LMs should proactively engage the employee in discussion of what and by whom information is appropriately shared with co-workers in order to increase the chances the arrangement will be accepted and perceived as fair by those third parties.

Using financial i-deals as a method of retaining employees in place of a competitive, market-based compensation scheme appears likely to lead to the creation of i-deals perceived as unfair, potentially reducing the overall effectiveness of the arrangements (Rousseau et al. 2009). As previously advised in Chapter 7, HR representatives are encouraged to take on a gatekeeper role in the negotiation of financial i-deals, whereby they can act to discourage the creation of these arrangements except for the highest performing employees. LMs and HR should also be alive to the possibility that co-workers perceive the nature of resources offered by i-deals differently to the employer. The findings suggest that this is a particular risk for certain benefits negotiated through i-deals that may not be viewed as financial in nature yet are more visible than differences in pay (e.g., increased holiday entitlement). The careful assessment of benefits and their offering to employees is encouraged before they are negotiated as part of an i-deal in order to reduce the risk of disgruntled reactions by co-workers who feel a particular resource has been allocated unfairly.

In contrast, given the broad potential benefits of flexibility i-deals, LMs and HR representatives should promote shared understandings that these arrangements are considered to be needed and fair in the broadest of circumstances. This research has made calls for future research to consider how cultural levers can be utilised to this effect, for example through the design of HR policy and practices. Nevertheless, as LMs are perceived as the agents of organisations (Gerstner and Day 1997; Purcell and Hutchinson 2007), they are encouraged to proactively communicate to their teams that they (and the organisation) are working to support employee work-life balance regardless of an individual's personal priorities outside of work, and that this can be achieved

through flexibility i-deals. Broader understandings of needed flexibility i-deals may be beneficial for employee's who would prefer to keep their reason for desiring a flexibility i-deal private. If flexibility i-deals are accepted as needed and fair in numerous circumstances, the specific reason for an employee's i-deal may not need to be shared. Broader acceptance of flexibility i-deals may also be beneficial to the co-workers themselves, as while they are third-party observers to i-deals (Greenberg et al. 2004), they are also the potential future recipients of i-deals (Rousseau et al. 2006). Co-workers are therefore encouraged to learn from their own reactions to i-deals and consider the potential for a flexibility i-deal to support their own needs either now or in the future.

### 9.6. *Limitations*

Turning to limitations, previous research has flagged demographic, cultural and individual differences as potential influences on an individual's use of justice rules. For example, Tornblom et al. (1985) identified differences in the way American and Swedish samples preferred certain resources to be distributed. Marescaux and De Winne (2016) found women to be more concerned with need when assessing the fairness of i-deals. Plus, Marescaux et al. (2021) propose that perceptions of i-deal fairness may be influenced by whether an individual is prosocial or proself, because prosocial individuals are more strongly guided by justice rules (Anderson and Patterson 2008). The qualitative exploratory nature of this research means that such specific variables have not been controlled for in the development of the proposed conceptual models, but future researchers considering their application may benefit from incorporating such controls into their testing.

As already highlighted in Chapter 7, none of the flexibility i-deals discussed by the respondents of this research involved employees increasing their working hours. Flexibility i-deals increasing an employee's hours may be perceived by co-workers as offering different resources than the arrangements discussed as part of this research. Thus, co-workers may assess the fairness of such arrangements against different criteria. This offers future research an avenue to explore differences in not only the formation and functioning of different types of flexibility i-deal but also co-workers' perceptions of the nature of these arrangements and how this may differ to the employer perspective.

Noticeably, the data collected by this research does not highlight co-worker concern with how flexibility i-deals impact their (or the employee's) ability to carry out their work (the functionality of the arrangement). This has been flagged as influencing co-worker assessments of i-deals by

past research (Vidyarathi et al. 2016; Marescaux et al. 2019) and was found by this research to influence subordinate perceptions of their LM's flexibility i-deals (to be discussed in Chapters 10 and 11). Future research should consider how co-worker perceptions of flexibility i-deals, that are more likely to impact task execution and role fulfilment, balance considerations of functionality and fairness/need. For example, is the potential burden from flexibility i-deals on role fulfilment the reason why co-workers are more accepting of certain reasons for requesting flexibility i-deals than others, leading them to consider which arrangements are *most* needed? Furthermore, to what extent do concerns regarding the functionality of the arrangements influence LMs' granting or denial of flexibility i-deals? Greater understanding of LM and co-worker concerns regarding the functionality of i-deals is needed, as these may be acting as a barrier to the broad distribution and acceptance of supportive flexibility i-deals.

This study discusses how the resource offered via an i-deal influences co-workers' adoption and assessment of socially acceptable criteria for evaluating i-deal fairness. However, the research findings are limited to co-workers' attitudes towards and experiences of financial and flexibility i-deals. Future research should explore co-workers' evaluations of i-deals offering different content, such as developmental and task i-deals. Such research should seek to understand what co-workers believe constitutes a fair developmental or task i-deal, what criteria they use to assess the fairness of these arrangements, and what influences and information inform those assessments. Further, a multiple stakeholder approach would allow for understanding of whether (co-)worker and employer perceptions of the nature of the resources offered via developmental and task i-deals align, and the potential implications for creating i-deals that are perceived as fair by third parties.

A very small amount of data collected was relevant to the role of procedural justice in co-workers' fairness assessments of denied i-deal requests. The collected data did not provide sufficient detail to be confidently analysed but may highlight potential avenues for future exploration. A small number of co-workers suggested that the process of i-deal negotiation should be fair and that this fairness was achieved through consistency whereby employee requests for i-deals should all be given equal consideration. For example, one respondent described the actions of a specific LM as unfair because he was perceived to be reluctant to form certain i-deals, and denied requests without giving them the same consideration as other managers. Procedural justice may therefore be an informative theoretical lens for future examinations of denied i-deal requests, including employee and co-worker responses, as denied i-deals remain relatively overlooked within the literature (Liao et al. 2016).

Finally, the data collection undertaken for this research was completed shortly before homeworking was enforced for many workers in the UK as a result of the COVID19 pandemic (Working Families 2020). Consequently, this research does not have evidence of how these experiences may have impacted co-worker attitudes to, in particular, flexible working and flexibility i-deals. This is an important avenue for future research to consider. Nevertheless, given the influences on co-worker assessments of flexibility i-deals that have been determined by this study, the long-term and widespread changes to working arrangements that have been experienced may have positive implications for the broad use and acceptance of flexibility i-deals. As more workers, all with varying home lives, have worked from home and potentially adopted new working schedules, a potential outcome is a more widespread appreciation of how flexible working arrangements can support their own and other employees' specific circumstances. As such, co-workers may be more understanding of the need for flexibility i-deals for a diversity of reasons, even if those experiences or circumstances are not directly shared.

#### 9.7. Summary of contribution

Co-workers have previously been identified as key third parties to the functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), yet empirical explorations have overlooked these stakeholders relative to the employees in receipt of i-deals. This research helps broaden our understanding of co-worker attitudes towards i-deals, proposing theoretical models of fair flexibility (Figure 9.1) and financial (Figure 9.2) i-deals. These models detail co-workers' adoption of and assessment against socially acceptable criteria for evaluating the fairness of these i-deals. The research contributes to existing understanding by revealing that upon first encountering i-deals, co-workers may judge them as unfair exceptions to organisational policy, but through exposure to these arrangements they adopt socially acceptable criteria against which to assess the fairness of i-deals. These socially acceptable criteria of fairness that are adopted vary between i-deal type, dependant on the perceived nature of the resource on offer via the arrangement. The research also demonstrates the potential for co-workers and employers to perceive the nature of the resource on offer via an i-deal differently, highlighting the importance of considering i-deal formation from multiple perspectives. The findings extend upon existing understanding of co-worker perceptions of i-deals as fair or unfair by revealing what constitutes flexibility i-deals as *needed* and financials i-deal as *equitable*. Turning to co-workers' assessment of i-deals against these socially acceptable criteria, the research reveals the various influences and information that inform co-workers assessments of i-deal fairness. Knowing why a flexibility i-deal has been requested allows co-workers to assess an employee's need for the arrangement, based

on shared understandings or experiences. In contrast, when assessing whether a financial i-deal is equitable, co-workers use social comparisons to determine whether an employee is a (comparatively) high performer. Furthermore, the timing of i-deal negotiation is highlighted as influencing co-worker assessments of financial i-deals as equitable but not flexibility i-deals as needed. Theoretically, the findings reiterate the relevance of organisational justice theory to understanding the co-worker perspective on i-deals, when it is broadened out beyond merely equity considerations, and integrated with SRT and social comparison theory.

The next two chapters explore the remaining findings of the research, focused predominantly on subordinate experiences of and attitudes towards LM flexibility i-deals.

## **10. Findings - Subordinates attitudes to and experiences of line manager flexibility i-deals**

The third set of substantive findings to be discussed focuses on line managers (LMs) as the recipients of - rather than simply those who grant - flexibility i-deals, and the implications of LM flexibility i-deals for the experiences and attitudes of their subordinates. The findings show that LM flexibility i-deals can impact the extent subordinates feel supported to carry out their job, and consequently their views of whether or not the i-deal acts as a barrier to both their own and their LM's successful fulfilment of their role responsibilities. Plus, the findings demonstrate how the behaviour of LMs with flexibility i-deals can influence subordinate perceptions of the availability of flexible working options for employees, and subsequently whether or not their LM's i-deal is considered fair.

First, the chapter presents the findings focused on the relationship between LM flexibility i-deals and the extent subordinates feel supported to carry out their role. The degree of flexibility accommodated by a LM flexibility i-deal is shown to influence subordinates' perceptions of support. Further, subordinates use the extent they feel supported by their LM as the basis for whether or not they perceive the LM flexibility i-deal as preventing them (and their LM) from successfully fulfilling their role responsibilities. Based on the research findings, two factors are presented as potentially mitigating or exacerbating this relationship between flexibility i-deals and subordinate perceptions of being supported to carry out their role. The first mitigating/exacerbating factor considers subordinates' access to support when the LM is not physically present. The second mitigating/exacerbating factor is the extent the subordinate is established in their role. The chapter then explores the findings focused on LM behaviours in response to their own flexibility i-deals, and how these can lead to their subordinates experiencing either increased or restricted levels of flexibility. The findings demonstrate that while some LMs with flexibility i-deals become advocates for flexible working, and increase opportunities for their subordinates to work flexibly, other LMs restrict these opportunities for their subordinates as they try and negate against any negative impacts from their arrangements. These experiences are shown to influence subordinate perceptions of the availability of flexible working options and their assessments of their LM's flexibility i-deal as fair or unfair.



### *10.1. Subordinate experiences of and attitudes towards (dys)functional line manager flexibility i-deals*

The findings highlighted a relationship between LM flexibility i-deals and subordinate perceptions of the support they receive to carry out their job. This influenced subordinate perceptions of whether the LM flexibility i-deal was a barrier to their own and their LM's ability to fulfil their role. First, the influence of the degree of flexibility accommodated by the LM i-deal on subordinate perceptions of support is presented, before moving on to review additional influences found to mitigate/exacerbate this relationship.

#### *10.1.a. Degree of flexibility and perceived support*

The findings demonstrate that the degree of flexibility accommodated by a LM i-deal can impact whether subordinates feel supported to carry out their job tasks. As a consequence of this relationship, subordinates perceived their LM's flexibility i-deal as functional or dysfunctional based on whether they believed the arrangement acted as a barrier to role fulfilment.

The degree of flexibility accommodated by an i-deal represents the extent the i-deal departs from the standard contractual terms of office-based working between 8 or 9am and 5 or 5:30pm (dependent on the case organisation), Monday to Friday. An i-deal accommodating high levels of flexibility would allow a LM to frequently work outside of these contractual hours, take time off during these hours, or frequently work away from the office. A LM with an i-deal accommodating low levels of flexibility would still be based in the office and be working between the standard contractual hours the majority of the time. Interviewees described attitudes (their own and that of others) towards what was an acceptable level of flexibility accommodated by a LM flexibility i-deal, and this was based on the impact of these arrangements on the support being received by the LM's subordinates. One common belief to emerge was that LMs are better able to support their teams when they are physically present. Consequently, a number of interviewees expressed a view that managers needed to be working in the office for at least some part of every day.

For example, Tamsyn, a LM at InsuranceCo who had negotiated her own flexibility i-deal, explained that *"one of the things I was very conscious of was making sure I was around to support the people I manage. ...as long as I'm still there every day for them, then they are still getting a lot of support."* Emma suggested that this also was a common view in a previous department she'd worked in:

...[management] *would expect you to be there for the majority of the day, every day. I've known people who've worked there who have then had to step down [from a manager role] because they haven't wanted to do that... they think that it's only fair on that team of people that they've got someone that they can always go to.*

Emma: LM with a flexibility i-deal, InsuranceCo

Emma's description reveals a perception that existed within her previous department that LM's are unable to fulfil their responsibilities to their subordinates if they work flexibly and are not physically present and available for those subordinates every day. However, while Emma agreed that being present for the team each day was important, she was critical of refusing requests for flexibility i-deals that only minorly adjusted or reduced a LM's hours:

...[one] *person that had made a request had recently been recruited into the role [of team leader]. She said she wanted to finish at 12 o'clock one of the days so I spoke to the manager about it and... she made me decline it. I did understand where my manager was coming from, I did understand her point of view, but at the same time I didn't really think that half a day was that much of a big deal to be honest with you. She was going to be in every day. She was going to see her team every day. I didn't think just going home at lunch time once a week was going to be that much of a problem.*

Emma: LM with a flexibility i-deal, InsuranceCo

Emma's stance that some degree of flexibility for LMs was acceptable was not uncommon. Examples of low-level flexibility i-deals held by LMs, where working hours shifted only minorly, were almost universally described positively or as having little to no impact on subordinates. For example, as a result of both her own and her LM's flexibility i-deal, Helen (InsuranceCo) occasionally found herself in the office at times of the day when her manager wasn't present but explained that this *"hasn't caused any problems. If I need some support with one thing, I can do something else. I can prioritise."* Because Helen still had contact with her LM every day, when she needed some support and they were not present, she could reprioritise in the short-term and she did not perceive the arrangement as a barrier to her continuing with her work.

Being able to adapt to short-term separations from your LM, as a result of a low-level flexibility i-deal, was also discussed by other interviewees. Ben Thompson (surname also a pseudonym), who

had an i-deal allowing him to come into the office later each morning, described how his team would push back the start time of meetings for him:

*...if there's meetings that they have, they normally say "[let's start at] 8.30" or 9 o'clock even, not 8 o'clock [laughs]. So, in fairness they do do that. ... They, sort of, just don't put it at 8 o'clock. If it's a meeting that we're all in as a team then it's normally 8.30.*

Ben: LM with a flexibility i-deal, ConstructionCo

In combination with Ben's claim that his team pushed back meetings to support his schedule, one of his subordinates suggested his team were happy to make this small accommodation for Ben's i-deal and did not see this as out of the ordinary or as having a negative impact on them or their work. Paul (ConstructionCo), a LM with a flexibility i-deal himself but also a member of Ben's team, suggested that *"Ben is not a morning person. ...[but] him getting in at what generally is known as Thompson o'clock is not an issue."* It appears that when LM i-deals allowed for low levels of flexibility, with the manager still being physically present every day, subordinates were willing to make minor accommodations to adapt to these arrangements and did not perceive a decrease in the level of support they received to do their job.

Nevertheless, a LM's physical presence every day was not universally considered necessary by interviewees. Lynne had an i-deal to support her childcare requirements and presented an alternative view:

*I think the rule is that you have to be contactable for your people, you don't have to be physically present. ...But equally, I think it's understanding what your team need. So, if actually I have someone who is very hands on and needs a lot of support, where can they get that if I'm not here? So, it's making sure they have a support network, and getting them to think about that themselves. So, they are thinking "what are my needs?" Your boss can't be all things to all people so you have to think broader and set yourself up so you, actually, say, have a check in with me before I go... So, it's for everybody to make it work.*

Lynne: LM with a flexibility i-deal, InsuranceCo

Lynne suggested that LMs should not be obliged to be physically present for their subordinates every day, and that adjustments could be made to ensure teams are supported if LMs work more flexibly. She believed that it is partly the responsibility of subordinates to adjust to LM flexibility i-

deals, but also highlighted the need for LMs to consider how their teams will access support when they are not present. Lynne's view was supported by several interviewees who described LMs who, for example, worked from home once or twice a week, but were able to minimise the impact on their subordinates by remaining contactable and responsive (see section 10.1.b.i):

*...she always works from home one day a week and she's great as a boss... she's great on her email and great on her phone, so it's not that she's MIA for a Friday.*

Laurie: subordinate with a flexibility i-deal, ConstructionCo

*My manager, for example, she works from home on Thursday and she doesn't work on a Friday. ... She's extremely accessible from home... so, in no way do I feel it hinders me. No, it doesn't hinder me at all.*

Amelia: subordinate, InsuranceCo

In contrast, LM i-deals accommodating higher levels of flexibility were discussed in more critical terms:

*My line manager works from home every Friday and every other week: all week, every other week. ...it's strange because it's so frequent. And if he goes on training courses those will be in his week in the office so I won't see him for maybe three weeks because then he'll go back home.*

Elizabeth: subordinate, InsuranceCo

These high-level LM flexibility i-deals, that allowed LMs to work away from the office or outside of core hours on a frequent basis, were often described as a barrier to LMs supporting their teams. This provision of support to subordinates was described as a core responsibility that LMs were, as a consequence of their high-level flexibility i-deal, not fulfilling:

*I don't think flexible working is a bad thing but when it gets to the point where you're spending more time at home than you are at work, especially as someone more senior: how can you be a manager if you're never here to manage? ...I've known people who go without seeing their manager all week... I do think honestly, generally do think these flexible working arrangements are good but it's clearly a bad thing when that happens, right? ...there needs to be some appreciation that part of what you do is being there for your team.*

Seb: subordinate, InsuranceCo

In summary, LM i-deals accommodating only low levels of flexibility were generally not considered problematic by LMs or subordinates. These arrangements were described as having little to no impact on the support received by subordinates to carry out their work. In response to these low-level flexibility i-deals, subordinates were able to adapt to the small periods of time their LM was not physically present, and even when they needed support could adapt or reprioritise so they could carry on with their work. LM i-deals accommodating higher levels of flexibility were described as a barrier to supporting subordinates due to those LMs frequently being physically away from their teams. As the provision of support to their teams was described as a key responsibility of the LM role, these LM i-deals accommodating high-levels of flexibility were more likely to be perceived by subordinates as dysfunctional.

However, in the next section the findings reveal that as the level of flexibility accommodated by a LM flexibility i-deal increases, subordinates can still feel supported to carry out their role if they can access support in other ways. This is presented as the first of two mitigating (or exacerbating) factors on the observed relationship between flexibility i-deals (specifically the degree of flexibility) and subordinate perceptions of being supported to carry out their role.

#### *10.1.b. Mitigating or exacerbating factors*

Now, the chapter explores the findings that revealed two influences that acted to either mitigate or exacerbate the observed relationship between LM flexibility i-deals and subordinate perceptions of support. First, whether subordinates can access support when their LM is away from the office is discussed, before turning to examine the extent the subordinate is established in their role.

##### *10.1.b.i. Subordinate access to support*

When flexibility i-deals allowed LMs to be absent from the office during core hours, whether subordinates could still access support (from the LM or elsewhere) appeared to influence their perceptions and experiences of the i-deal. Two ways subordinates can access support when their LM isn't physically present emerged from the findings: 1) the LM remains contactable and responsive (through the use of communication technology solutions) and 2) turning to peers/other LMs for support.

When describing the impact of LM flexibility i-deals on subordinates, a common theme to emerge was whether LMs were contactable and responsive when they were away from the office.

Subordinates described LM flexibility i-deals as having less impact on the functional support they received and their ability to carry out their work when their LM was easy to get in touch with:

*Even if he's not here, he's always been available when I need him.*

Cassie: subordinate, InsuranceCo

*I just WhatsApp him or I can give him a call. ...there haven't been any issues at all.*

Cerys: subordinate, InsuranceCo

Malcolm explained that he and his LM jointly reviewed how well his LM's flexibility i-deal was working. This allowed him to ask for more regular catch ups to increase their contact when his LM was away from the office. This meant Malcolm continued to access the knowledge and support he wanted without the need for his LM to be physically present:

*For me, it was making sure that he was available. So, while he might not be physically there so I can go "come over here, I need to ask a question", it's, you know, what's going to be the best method to kind of accommodate if I have a question? If I've got a question, how can I ask you on an ad hoc basis? And then I said it would be good to have more regular touch points than if you were here, because I'm not going to have as much of that ad hoc, lean over the desk and ask a question. So, we had more regular catch ups... we put things in place so actually I didn't feel I was missing out. You don't have the physical [contact] but you don't miss out on the knowledge, the support, all that kind of stuff. So, yeah, we kind of worked our way through it. At first it was a case of "how is this working?" and I said we probably could do with a couple more catch ups so we started doing that and then kept reviewing as we went along. He was very open to understanding my thoughts on it too and I felt able to be really honest and say what I needed.*

Malcolm: subordinate and HR, InsuranceCo

LMs with i-deals themselves also noted the importance of being contactable and responsive for their teams when they were not physically present, and that communication technology made this possible. Phillip and Lynne both highlighted their efforts to make themselves contactable for their teams when they weren't working in the office:

*Modern technology allows people to be contactable, so I don't allow it to be a barrier to conversations and questions. ...I always make sure I'm online and send a message just to say "Look guys, just to remind you that I'm here." ...I actually feel guilty if somebody sends me a message and I've just nipped off to the toilet, or I miss a call. I always have these [gestures to mobile phones] on me.*

Phillip: LM with a flexibility i-deal, InsuranceCo

*They know if they ring me, I answer, or I call back as soon as I possibly can, or I'll text them and say "I'm just doing this, let me call you back in ten minutes" so they can reach me. If they email me, I reply to that email. It's making sure you are very contactable and very present in mind, if not in body.*

Lynne: LM with a flexibility i-deal, InsuranceCo

In contrast, subordinates who found it difficult to get in touch with a LM who, for example, was working from home, suggested it was harder to get the support they needed. Elizabeth's (subordinate, InsuranceCo) LM worked from home regularly and she described getting the help she needed as "really hard" because "he's not very responsive when he is working from home".

Many of the subordinate descriptions suggested that a lack of functional support from their LM (as a result of that LM's flexibility i-deal) had a general impact on their ability to carry out their role. Some also gave specific examples of how being unable to contact their LM made it difficult to complete specific tasks or meet deadlines:

*She always had Friday afternoons off and worked from home in the mornings... and [the team] always had our big launches on a Friday...and there would always be something that would go wrong. ...it caused problems for the business. It was hard getting stuff done. We were trying to fix things and she's not there to help, and everyone's like "we'll have to do it on Monday, she's not here", and I'm like "we can't do it on Monday, we have to do it today!"*

*Is it hard to get things done then, when she's out of the office?*

*Yes, it is, because you can't just run over to them and say "can you look at this?" Even if she's working at home, you just have to send an email and hope that they read it on time and if they don't, you can't move stuff forward.*

Daisy: subordinate, InsuranceCo

A potential reason that emerged from the findings for some LMs being less contactable and responsive when working flexibly, particularly when working from home, was they were using the opportunity to “*catch up with everything that I need to do and all the actions from the week*” (Emma: LM with a flexibility i-deal, InsuranceCo). A number of LMs revealed that homeworking provided them with the opportunity to carry out tasks they found difficult to complete while in the office:

*Friday, for me, it's a time when there's no distractions. I work from home, and then I cover off all the actions that have come out of those meetings that I very rarely have time to complete during the week, because I've got a big team as well, so they are quite demanding on my time. And it means I can also then prep for the week coming, on that Friday as well with minimal distractions. I still get phone calls and emails though.*

Philipp: LM with a flexibility i-deal, InsuranceCo

*When you're in the office, you get people pop their head round the door "can you look at this for me?" whereas if they had to send an email they might [think] "ah, I'll ask someone else". They obviously can still email me and I'd never tell them not to but it is a perk that they might try and figure it out themselves first or ask someone else because it means I'm not disturbed.*

Paul: LM with a flexibility i-deal, ConstructionCo

These descriptions revealed the multifaceted nature of LM roles, whereby management and support of their subordinates was not their only responsibility. While the ability to catch up on other work was not the reason any of these LMs had requested their flexibility i-deal, it was described as an added benefit of the arrangement. While some LMs described themselves as making efforts to be contactable and responsive when working from home, others may find the multiple demands of their role harder to balance or may be purposefully using this time to focus on other aspects of their work.

Some LMs even suggested that they make efforts to be contactable on their non-working days or outside of their working hours, not just at times when they were working away from the office. Tim (InsuranceCo), a LM whose i-deal allowed him to work condensed hours Monday – Thursday noted that “*even on a Friday if [my team] need to speak to me, I'm always available because I'm just a phone call away and, sometimes I'm logged on so I can catch up with them.*” However, this availability outside of working hours was not always possible or desirable for LMs, even if their



subordinates expected it. Lynne, whose i-deal helped her to balance her work life and family life, described an instance where a past team member had expected her to support him outside of her agreed working hours and wasn't happy when she pushed back:

[A previous team member] *did not get it. ...there was one particular time I remember, although it happened three or four times actually, but there was one particular day where he hadn't told me he needed something off me, I'd finished for the day and he was on the phone to me about three, half past three, saying he needed this and that off me. I said "That's fine, I'll do it later, it's my son's 5th birthday today. I'm celebrating with my son but as soon as they're in bed I will get onto it for you. It's fine", and then my boss text me saying "this really needs to be done" and then she rang me saying "I've just had Adam on the phone, he says you can't do it because you're doing some sort of family stuff." I said "I'm not doing family stuff, I finish work at two and it's my son's 5th birthday today" and she went absolutely nuts on my behalf.*

Lynne: LM with a flexibility i-deal, InsuranceCo

Lynne described this past subordinate complaining to her own manager that the flexibility i-deal she had negotiated was a barrier to both of them carrying out work that was required. Despite Lynne being willing to work outside of her agreed hours, the subordinate was unhappy that this work was not completed on his preferred timescale and within standard office hours. Lynne's experience highlights that being constantly contactable for and responsive to your subordinates may not always be appropriate for LMs who have requested to amend their working hours for specific reasons. Plus, while some LMs expressed a willingness to stay contactable for their team, these findings demonstrate the potential for LM's work to spill over into non-working time in order for them to successfully balance their flexibility i-deal and the demands of their work (including the needs of their subordinates).

In scenarios where subordinates were not able to access their LMs, either because their working hours differ or the LM was unresponsive when working away from the office, some employees were turning to their peers for the functional support they needed to carry out their work. Cassie (subordinate, InsuranceCo) explained that when she needed help with her work but her LM wasn't available, she would *"ask people around me... I think it depends on the issue itself, [but] I've not really had any issues where only my manager could step in and help. I ask people next to me."* Because Cassie's peers helped her when she needed it, she didn't feel her LM's flexibility i-

deal was a barrier to her carrying out her own work. Cassie's peers were stepping in to support her as an informal response to their LM's flexibility i-deal and it was not an arrangement put in place by the LM. In fact, despite the positive impact of peer support on subordinates' experiences of LM flexibility i-deals, no interviewees gave examples of LMs with flexibility i-deals putting in place formalised options or guidance for subordinates to access support from others when they weren't present. This was the case despite subordinate acknowledgement that this type of support would be helpful:

*It would be nice if I had someone to go to. I guess I could say "Please could I have a mentor within the team?" because that was never really established.*

Elizabeth: subordinate, InsuranceCo

The findings suggest that one reason LMs might not have been formalising peer support options, or perhaps were reluctant to put them in place, was due to concerns with how this would be perceived by other stakeholders. Emma suggested that it might be viewed as unfair if others were required to provide support to employees because their LM was regularly allowed to work away from the office or outside of core hours:

*...they think that it's not fair because they're leading a team of people.... You could say "well there's other team leaders, they can go to them [when their LM isn't present]", but then I think the argument is it's not really fair on those other team leaders because they're sort of picking up the slack from the person that's off, and I do think that is, sort of, how it would be seen.*

Emma: LM with a flexibility i-deal, InsuranceCo

Emma's description also highlighted a potential unwillingness by some others to step in and adapt their way of working in order to support LMs with flexibility i-deals. Examples were even provided by subordinates of their peers refusing to step in and provide help to other subordinates when their LM was absent because this was viewed as the LM's responsibility. For example, when Elizabeth joined InsuranceCo, she felt she was left to try and manage her work without the training she needed to successfully do her job:

*I think he assumed that someone else would train me [when he was at home] but they were all like "that's not my job, that's the manager's job, I'm not getting paid to do this."*

Elizabeth: subordinate, InsuranceCo

These findings suggest that, as multi-party arrangements, flexibility i-deals that lead to peers or other LMs having to provide functional support in place of the LM, risked being perceived negatively by those third parties, and/or that those third parties might refuse to provide that support. Consequently, some LMs may overlook or resist putting formalised peer support options that would assist subordinates in place, leading to subordinates not being able to access the support they need to carry out their job. These findings demonstrate the multiple relevant parties to LM flexibility i-deals. Plus, LM's attempts to protect certain stakeholders against any negative impacts from their flexibility i-deal (co-workers or other LMs) can have detrimental effects for other stakeholders (subordinates). As will be discussed next, this becomes more of a risk when subordinates are less established in their role.

This theme demonstrates how the impact of LM flexibility i-deals on the support received by subordinates could be mitigated against by 1) LMs being contactable and responsive when working flexibly, and/or 2) the provision of peer support. These findings correspond to those presented in the previous section that demonstrate how subordinates are able to accommodate and adapt to low-level LM flexibility i-deals, but for higher-level LM flexibility i-deals alternative methods need to be put in place to maintain subordinate perceptions of the support they receive to carry out their job.

*10.1.b.ii. Extent to which subordinate is established in their role*

A second mitigating/exacerbating factor on the relationship between LM flexibility i-deals and subordinate perceptions of support emerged from the findings. It was found that the extent subordinates were established in their job impacted how affected they felt by their LM's flexibility i-deal, with those less established appearing more likely to feel unsupported to carry out their role as a result of the arrangement. The findings revealed four interconnected reasons for this impact: 1) less-established subordinates had a less developed relationship with their LM and this acted as a barrier to contact between the two parties, 2) LM flexibility i-deals were slowing down the build-up of a closer relationship between less-established subordinates and their LM, 3) less-established subordinates had not yet built up a peer support system that could be relied upon in their LM's absence, and 4) less-established subordinates had an increased need for support in order to carry out their job.

The findings demonstrate subordinates who were new to their role, and had not yet built a relationship with their LM, were concerned about being perceived as contacting their LM who was working away from office either too much or for unnecessary reasons. Rob (subordinate,

InsuranceCo) explained that when he first started in his role he found *“being able to pick up the phone and contact [his line manager] quite difficult.”* He explained that he had questioned *“am I worth their time right now?”* and *“is it really worth [contacting them]?”* Cassie had shared similar concerns despite her LM having encouraged her to get in touch whenever she needed:

*We had the initial meeting before I came onto the team and really got on with him... He was like “yeah, no problem, pick up the phone if you need me. I’m a phone call away” and things like that, but it’s okay someone saying that, you’ve got to get to that point yourself where you’re comfortable doing that, before you’re able to say “okay, I’ve got an issue that warrants a phone call.”*

Cassie: subordinate, InsuranceCo

The findings suggest that being new to their position and having not yet developed a strong relationship with their LM, those less established in their role were more reluctant to contact their LM and ask them for help if they were away from the office. Unfortunately, this problem was exacerbated further by the impact of LM flexibility i-deals on the development of the subordinate-LM relationship itself. Some subordinates noted that it had been harder to for them to build a relationship with their LM who was frequently away from the office. For example, Elizabeth (whose LM worked in the office four consecutive days a fortnight but the rest at home), noted that she felt *“really frustrated”* when she had first started in her role, because *“you want to make a good impression... but he’s not there!”* Cassie (subordinate, InsuranceCo), whose manager also had a flexibility i-deal allowing him to regularly work away from the office, agreed that *“at the beginning it made it hard for me to build quite a close relationship with him.”*

The consequence of less-established employees being more reluctant to contact a LM who was away from the office was that these subordinates were waiting until they physically saw their LM to ask for their help, delaying the support they received and acting as a barrier to them carrying out their role:

*At first it was really hard because I didn’t know what my job was, I didn’t know what my tasks were and I had no one to really walk me through stuff so I had to kind of figure it out myself, got it a bit wrong and he’d come back in the next week and I’d be like “please help me!”*

Elizabeth: subordinate, InsuranceCo

Furthermore, the findings suggested that when some subordinates were less established, they found it particularly difficult to access support when their LM was absent because they had not yet built up a support system with colleagues. Daisy (subordinate, InsuranceCo), whose LM worked at home on Thursdays and did not work Fridays, noted that it was *“tricky in...the first 6 months, but past that I’d gotten to know enough people that it was fixable without her being physically there: other people rallied round.”*

These issues were particularly problematic because these less-established subordinates were described as needing more support in order to carry out their job relative to their more established peers. Seb noted the difficulties of being new to your role if your LM was regularly away from the office. Plus, he highlighted those on the graduate scheme (who were relatively new to the business and their chosen career, and moved around multiple roles to develop their skills) as employees who were in particular need of LM support to learn how to successfully carry out their roles:

*It’s good that you can work from home but don’t take the piss, actually be there for your teams. Where are they going to get guidance? A couple of grads in the years below me are in these teams where the managers are hardly ever there and you think “How can you ever learn? How can you ever improve?” I think it’s a bit unfair on them really... I was always very lucky that my managers were regularly there so I always had somebody to lean on, whereas I think it’s a bit sh\*t if they’re not having that, especially for those in their first roles.”*

Seb: subordinate, InsuranceCo

Less-established subordinates’ increased need for support to carry out their work, and the potential for LM flexibility i-deals to act as a barrier to providing this support, was also noted by LMs. Tim, a LM with an i-deal that allowed him to work at home on certain days of the week, commented that for this reason he had not utilised the flexibility accommodated by this i-deal as often over the previous 18 months:

*I work from home less than I ever have done over the last year and a half because the team is quite new... I tend to be in more at the moment than not.*

Tim: LM with a flexibility i-deal, InsuranceCo

Tamsyn, a LM of graduates, expressed a similar view:

*I need to be around for the people who depend on me and that can change from time to time. I'm looking after some grads right now and they need more hand-holding and instruction. That's why my hours spread across Monday to Friday.*

Tamsyn: LM with a flexibility i-deal, InsuranceCo

In summary, the findings within this theme demonstrated that subordinates who were less established were more likely to be negatively affected by LM flexibility i-deals, and consequently feel unsupported to carry out their jobs. This could result from these employees having less developed relationships with their LM and peers, the LM flexibility i-deal acting a barrier to these employees building a stronger relationship with their LM, and these subordinates requiring more support to carry out their role.

Together, the findings presented in this chapter thus far (illustrated by the pathway in Figure 10.1) differentiate between LM flexibility i-deals perceived as functional and dysfunctional by subordinates. Subordinates perceived the provision of support to them and their colleagues as a key responsibility of their LM, and one that allowed them to successfully carry out their own jobs. As such, when subordinates felt unsupported as a result of their LM's flexibility i-deal, they believed the arrangement was dysfunctional, preventing both parties from successfully fulfilling their role responsibilities. In contrast, if subordinates continued to feel supported, despite their LM's flexibility i-deal, the arrangement was perceived as functional with both parties remaining able to successfully perform their role. The degree of flexibility accommodated by a LM flexibility i-deal influenced subordinates' perceptions of support, with high-level LM flexibility i-deals having a more detrimental effect than low-level LM flexibility i-deals. However, two mitigating/exacerbating factors on the relationship were identified: 1) whether subordinates could access support when their LM wasn't physically present (e.g., through their LM remaining contactable and responsive, and/or through support from peers or other LMs), and 2) the extent the subordinate was established in their role. Each of the factors presented appear to exist along a continuum (as depicted in Figure 10.1), ranging from success factors (e.g., low-level LM flexibility i-deals, subordinates who are well established in their roles) to risk factors (e.g., high-level LM flexibility i-deals, subordinates being unable to access support when their LM isn't physically present) for subordinates feeling supported and the LM flexibility i-deal being perceived as functional.

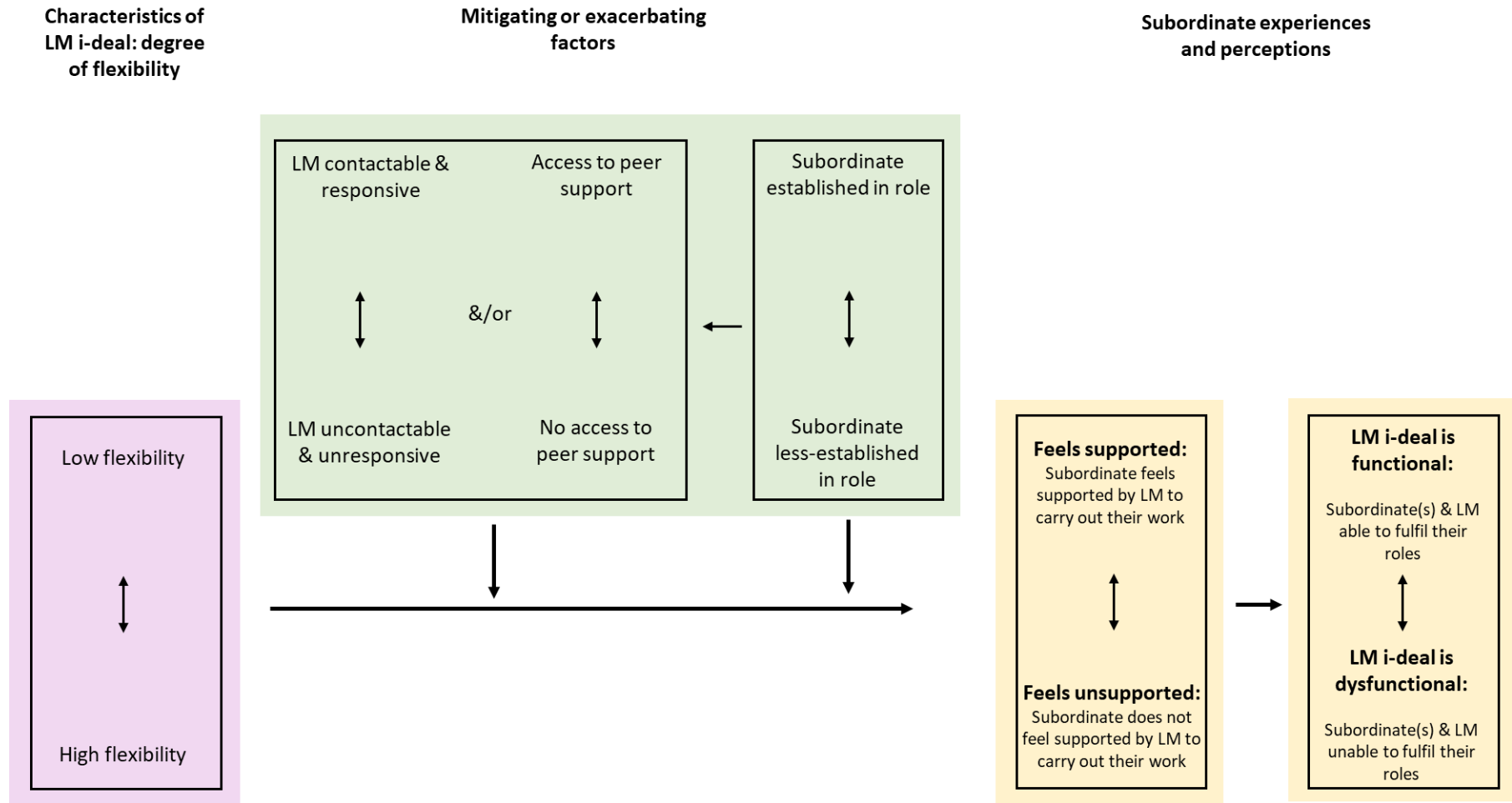


Figure 10.1. Subordinate experiences and perceptions of LM flexibility i-deals as (dys)functional.

Next, the chapter moves on to consider how LMs' behaviours in response to their flexibility i-deals influences subordinate experiences and assessments of the arrangement as fair or unfair.

*10.2. Line manager behaviours in response to flexibility i-deals: increasing or restricting flexibility for subordinates*

Next, the chapter moves on to explore findings that demonstrated how LMs' behaviours in response to their own flexibility i-deals impacted upon the experiences and attitudes of their subordinates. The findings showed that LM flexibility i-deals led to either an increase or a decrease in subordinate opportunities to work flexibly, depending on the behavioural response of the LM. On the one hand, LM flexibility i-deals could have trickle-down effects where LMs saw the value in flexible working practices and supported subordinate opportunities to work flexibly (through either granting their i-deal requests or by simply allowing them to manage their own time and working location). When LMs behaved in this way in response to their flexibility i-deal, subordinates viewed flexible working options as widely available to employees in their team and perceived their LM's flexibility i-deal as fair. In contrast, some LMs with flexibility i-deals restricted subordinate opportunities to work flexibly in attempts to counteract any potential negative consequences that might arise from their arrangement (for example, preserving a physical presence in the office to meet with stakeholders). When subordinates experienced this restriction in their ability to work flexibly as a result of their LM's flexibility i-deal, they viewed flexible working as more easily obtained by senior members of the organisation, and perceived their LM's flexibility i-deal as unfair.

A number of interviewees described scenarios where opportunities for subordinates to work flexibly aligned to examples of their LM having a flexibility i-deal. Some subordinates noted that they'd felt more confident asking for their own flexibility i-deal if their LM had one. For example, when Helen realised her LM had an i-deal to ease his commute and help him park near work, she'd felt able to ask for a similar arrangement.

*[My manager and I] sort of had a chat when I was being recruited and he was like "oh where are you from?" and when I described where I was from, he was like "oh, I have a bit of a commute in as well. I drive, I know how the parking situation works, I'm normally in at 7." So, when he said he was in at 7 I thought, okay, green light, I can ask to come in really early as well.*

Helen: subordinate with a flexibility i-deal, InsuranceCo



Her LM's i-deal had signalled to Helen that the nature of the arrangement was acceptable, and that her LM would understand and be sympathetic to her reasons for requesting her own i-deal. Laurie (subordinate with a flexibility i-deal, ConstructionCo) described a similar scenario when she had requested an i-deal to work from home once a week, explaining "*I did think it would be okay [for the arrangement to go ahead] because [my manager] always works from home one day a week herself.*"

In other scenarios, subordinates of LMs with a flexibility i-deal had not had their own i-deal granted, but experienced increased flexibility through being given control over their work schedule or location. Rob (subordinate, InsuranceCo) described his LM with a flexibility i-deal as "*very, very keen on [me working flexibly]. It's extremely flexible to the point that it's almost up to me how much I want to travel and where I want to work.*" A similar experience had been shared by Cerys, whose LM had a flexibility i-deal that allowed them to work from home once a week, and often encouraged the team to work from home as well:

*There are times where I've got a text, literally on Thursday morning [saying] "so, by the way you're the only one who's down to be in the office so feel free to work from home" and this is from my own manager. So, if anything, I've often even been encouraged to work from home if I want.*

Cerys: subordinate, InsuranceCo

Descriptions from LMs themselves provided further support for this finding. Tim and Phillip both had their own flexibility i-deals and explained that they were open to their teams working flexibly:

*I think how well [my arrangement] has worked for me has made me open to the guys working flexibly.*

Tim: LM with a flexibility i-deal, InsuranceCo

*It's reciprocal, I work flexibly and my message to my team is that, my exact words to them actually, is "you own your time. I don't mind when you work, it's your call... whether you need to work from a different office or work from home, that's absolutely fine."*

Phillip: LM with a flexibility i-deal, InsuranceCo

In such scenarios, where LMs encouraged flexible working and increased these opportunities for their teams, subordinates were more likely to view flexible working as widely available in their organisations, and describe their LM's flexibility i-deal as fair:

*...my team are fantastic for flexible working. They are so open and everyone does it. It's not a case of only the most senior people have that opportunity to work flexibly, it's open to everyone.*

Cerys: subordinate, InsuranceCo

*It's fair if everyone can do it.... [My line manager] sat me down and said "these are my flexible working arrangements. What are yours? What would you like them to be?" It was never a presumption that she could do it but I couldn't just because she's a manager or a higher pay grade.*

Amelia: subordinate, InsuranceCo

However, subordinates did not universally experience increased flexibility in conjunction with their LM's i-deal. In complete contrast, some interviewees described restrictions on their ability to work flexibly as a result of their LM's flexibility i-deal. For example, Daisy described how a previous LM, whose arrangement allowed them to work from home on Fridays, wanted her to be in the office when they weren't there:

*She always preferred me to be there, because she worked from home on the Friday, so she wanted me to be in that day so that I could see people in the office if she needed something from them, to make it easier for her [laughs]. It was completely for her sake, she needed me to be there to liaise with people and stuff.*

Daisy: subordinate, InsuranceCo

When her LM was away from the office, Daisy described her options for flexibility as having been restricted in an attempt to reduce the consequences of the LM's i-deal. In contrast, Elizabeth's ability to work flexibly had been restricted at times when her LM was in the office. Elizabeth's LM worked from home the majority of the time (6 days out of 10), so wanted his subordinates to be in the office when he was:

*I can't work from home on the weeks he's in because we all have to communicate at some point. I do get it but it seems unfair... if I've got a dentist appointment and I can't get one in the evening, I have to schedule it for when he's not in.*

Elizabeth: subordinate, InsuranceCo

In these situations, where subordinates didn't benefit from the same level of flexibility as their LMs, subordinates perceived flexible working to be more available or accessible to those in senior positions, and LM flexibility i-deals were described as unfair:

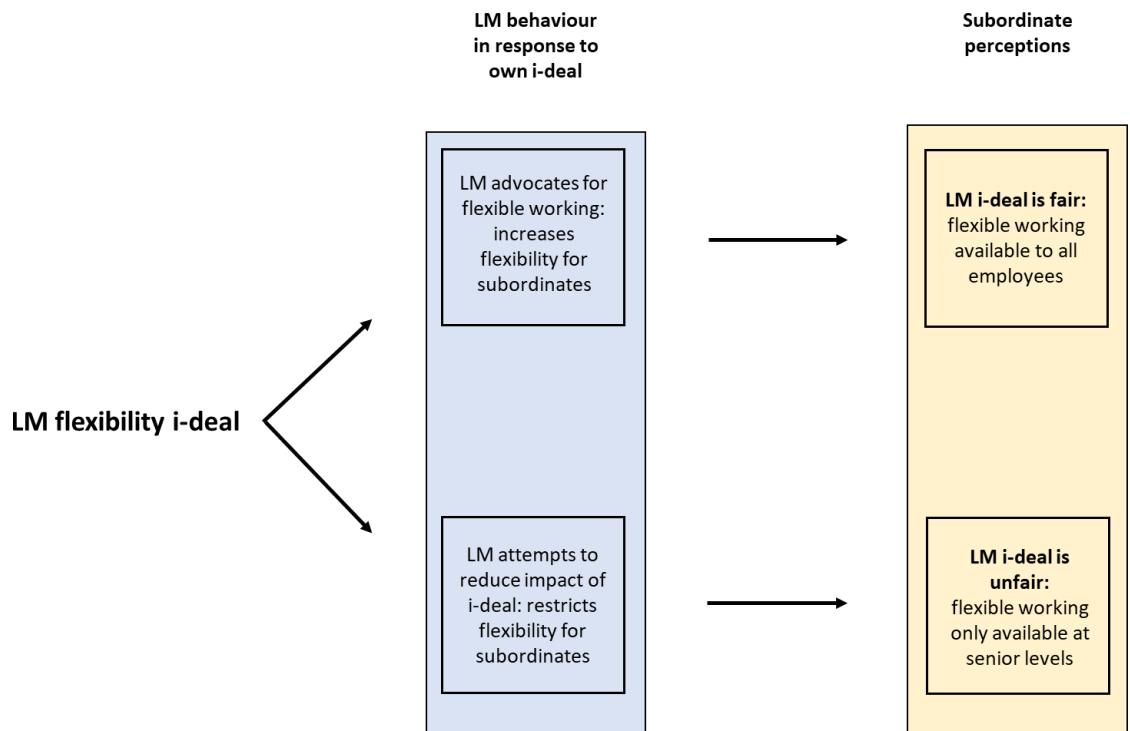
*...whenever I hear from people that they have these arrangements to work from home, I do look at them [and] sort of think it's one of those things that seems easier to get as you get higher. ...I don't think that's right, if they are going to let people do that, it should be available to everyone.*

Seb: subordinate, InsuranceCo

*Our head of department has said he doesn't want us working from home on a Friday anymore because he can't see what we're doing. But that [message] just came down from our Head of Department through our line managers who then told us, and my line manager works from home every other week and is still allowed to do that, and the boss who implemented the rule works from home twice a week. So, it's a bit like "urr okay?" It's very unfair... there's this kind of one rule for one person, one rule for another.*

Elizabeth: subordinate, InsuranceCo

Figure 10.2 summarises these findings, showing how LMs' behaviour in response to their own flexibility i-deals either increased or restricted subordinate opportunities to work flexibly. These experiences then impacted upon subordinate beliefs regarding the availability of flexible working options and the (distributive) fairness of their LM's flexibility ideal. LM flexibility i-deals were more likely to be assessed as fair by subordinates when flexible working was viewed as widely accessible and subordinates experienced flexibility themselves, versus unfair when flexible working options were restricted for subordinates and were viewed as accessible only by those in more senior roles.



**Figure 10.2. Subordinate perceptions of LM flexibility i-deals as fair or unfair.**

### 10.3. Summary of findings

Overall, the findings presented in this chapter demonstrate the determined consequences of LMs flexibility i-deals for their subordinates. Two pathways emerged from the findings. In the first, the influences of LM flexibility i-deals on subordinates' experiences and perceptions of being supported by their LM to carry out their role, and the perceived functionality of the arrangement, are revealed. The second pathway presents the found impact of LM behaviour in response to their own flexibility i-deals on subordinate experiences of flexible working. These experiences influenced subordinate perceptions regarding the availability of flexible working options and their assessments of the (distributive) fairness of LM flexibility i-deals.

In the next chapter, these findings are developed theoretically and considered in line with our understanding from the existing literature exploring i-deals, the LM role in the devolution of HRM and, where relevant, organisational justice.

## 11. Discussion - Line manager flexibility i-deals and their impact on third parties

The findings in response to research question four help broaden our understanding of subordinate experiences of and attitudes towards i-deals held by line managers (LMs), specifically flexibility i-deals. Collecting qualitative data from multiple stakeholders within organisations has allowed for a broader and deeper understanding of the attitudes towards and consequences of LM flexibility i-deals, based on how these impact third parties. While the perspective of employees with i-deals has received the majority of the empirical attention within the literature (Liao et al. 2016), very little of that work has distinguished between individuals with or without line management responsibilities (Rofcanin et al. 2018). Furthermore, co-workers have received relatively little empirical attention within the literature and the experiences of subordinates as a special type of co-worker have been almost entirely overlooked. This research demonstrates how LM flexibility i-deals, and the behaviour of these LMs, impact upon subordinates' perceptions of the i-deal being 1) functional and 2) (distributively) fair.

First, a typology of LM flexibility i-deals as they are perceived by third parties (particularly subordinates) is proposed, based on the findings explicated in the previous chapter. Then, the chapter will theoretically abstract each of the components of the empirical pathways that emerged from the findings and inform the proposed typology. How the findings support, challenge and extend our existing understanding of i-deals, the role of LMs as the consumers as well as the implementors of HRM practices, and the subsequent impact on subordinate attitudes and experiences will all be discussed. Next, by considering the findings in response to research question four alongside those already discussed by the thesis, what the overall project reveals about the numerous stakeholders to i-deals is highlighted. Throughout, the implications of the findings for future research are presented, and at the end of the chapter the practical implications and limitations are considered.

### *11.1. A typology of (dys)functional and (un)fair line manager flexibility i-deals*

Based on the research findings discussed in the preceding chapter, a typology of LM flexibility i-deals based on third-party perceptions is proposed (see Figure 11.1). The model presents the perceived functionality and distributive fairness of LM flexibility i-deals, and the implications for both role fulfilment (LM and subordinate) and organisational outcomes. LM flexibility i-deals are perceived by subordinates as functional and distributively fair when, respectively: 1) subordinates

feel supported to carry out their roles, and 2) flexibility is perceived as widely available to all employees. The core role LMs play in both the provision of support to employees and the devolution of HRM practices is highlighted by this typology. As LMs are key agents of perceived organisational support (POS), when subordinates feel unsupported to carry out their role they see this not only as a barrier to their successful performance, but also that their LM is not fulfilling their responsibilities either. Plus, LMs' consumption of flexibility i-deals is shown to impact their implementation of these same practices within their own teams, highlighting any potential injustices in the distribution of these arrangements to subordinates.

As such, when LM flexibility i-deals are perceived by third parties as functional and distributively fair (Q1 in Figure 11.1), they do not impair (LM or subordinate) role fulfilment in the eyes of those third parties, and flexible working options are viewed as available to LMs and their teams. Functional and fair flexibility i-deals may have positive impacts on employee attitudes and organisational outcomes. However, neither perceived functionality nor (distributive) fairness of LM flexibility i-deals alone is sufficient to lead to positive or even neutral outcomes for organisations. Based on the findings of past research exploring the outcomes of distributive justice perceptions, LM flexibility i-deals that are perceived as functional but unfair (Q2) risk having a negative impact on subordinate attitudes (e.g., affective commitment cf. Murphy et al. 2006) and organisational outcomes (e.g., turnover cf. Jones and Skarlicki 2003; Brashear et al. 2005). LM flexibility i-deals that are perceived as fair but dysfunctional (Q3) may have some positive effects on employee (LM and subordinate) attitudes and organisational outcomes, but based on third-party perceptions may be negatively impacting performance and productivity by acting as a barrier to LM and subordinate role fulfilment. Finally, LM flexibility i-deals perceived as unfair and dysfunctional (Q4) are proposed to have negative implications for employers due to the detrimental effect on subordinate attitudes and organisational outcomes, as well as the potential impact on employee role performance and productivity. Overall, this typological model offers opportunities for future research to apply, test and expand upon its propositions of third-party perceptions of LM flexibility i-deals, and the consequent implications for organisations.

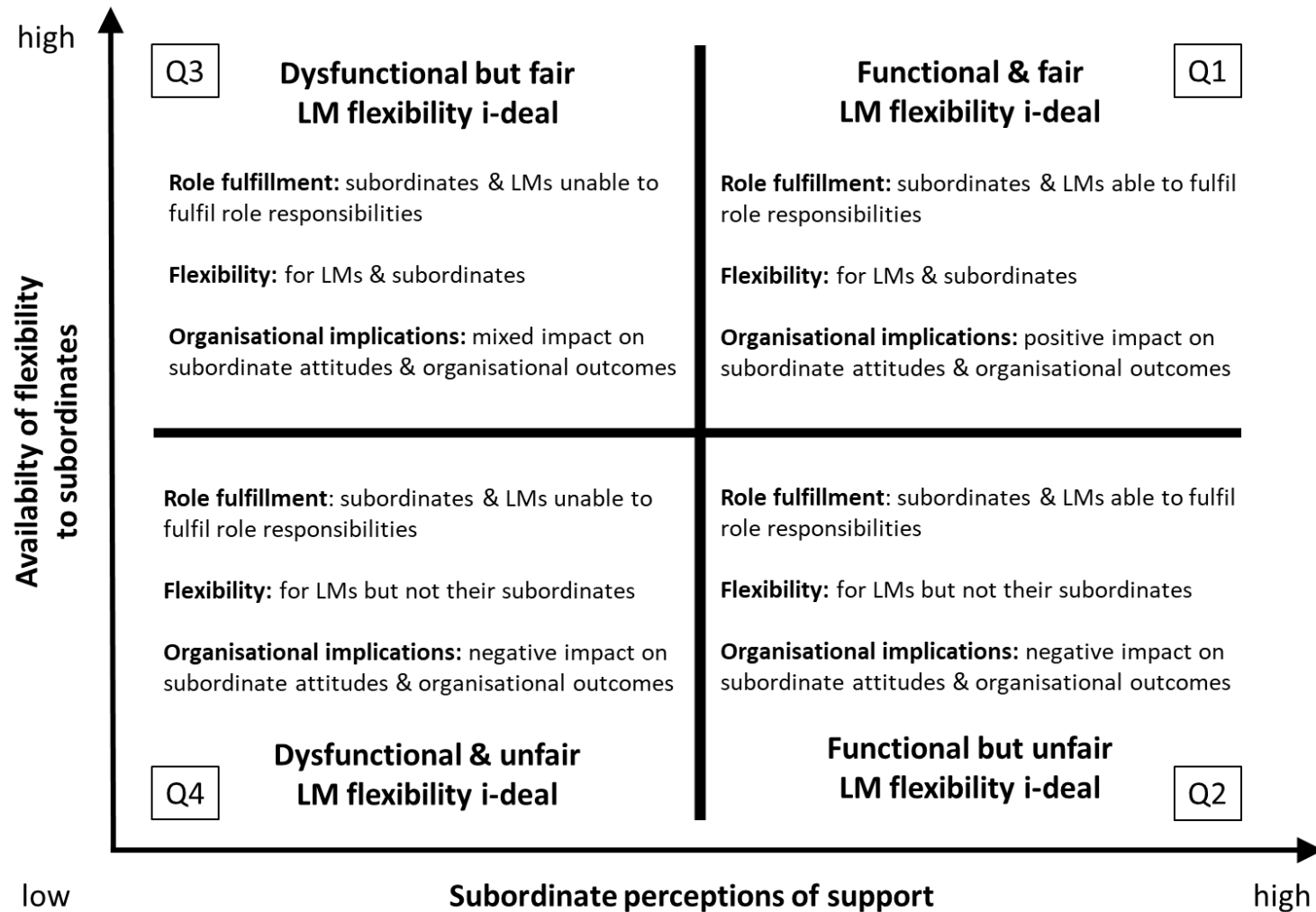


Figure 11.1. A typology of LM flexibility i-deals, based on third-party perceptions of their functionality and (distributive) fairness.

Theoretically, both the empirical pathways outlined in Chapter 10 and the typology presented here highlight similarities in the way LM flexibility i-deals are perceived by third parties, compared to i-deals previously examined within the literature (e.g., Rousseau et al. 2006; Collins et al. 2013; Rousseau et al. 2016; Vidyarthi et al. 2016; Marescaux et al. 2019). This research presents subordinates as a special type of co-worker based on their relationship to the individual with the i-deal: their LM. However, differences in the outcomes of LM flexibility i-deals, in comparison to flexibility i-deals generally, are also identified as a result of the nature of the LM-subordinate relationship. As a result, this study demonstrates the need for future research to differentiate between LM flexibility i-deals and flexibility i-deals held by those without line management responsibilities. The research also supports existing theorising focused on LMs as the implementors of HRM and how this affects subordinate experiences and attitudes through both formal and informal LM acts (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; McDermott et al. 2013). Furthermore, it serves as a reminder that LMs can also be consumers of HR practices and demonstrates how this consumption can influence their implementation of HRM, and subsequently subordinates' experiences of work and perceptions of HR practices within the organisation.

### *11.2. (Dys)functional line manager flexibility i-deals and perceived role fulfilment*

Now, the chapter will discuss in more detail each of the theoretical dimensions of the two pathways that inform the proposed typology of LM flexibility i-deals. The first focuses on third-party perceptions of LM flexibility i-deals as (dys)functional based on the effect of these arrangements on subordinates feeling supported, and consequently their perceptions of whether LMs and subordinates are able to fulfil their roles.

#### *11.2.a. Degree of flexibility and perceptions of support*

Subordinate descriptions of their experiences of and attitudes towards LM flexibility i-deals were predominantly focused on the way the arrangement affected the support they received to do their job: to learn the responsibilities of their role and carry out their tasks. The provision of support to subordinates was considered a key responsibility of LMs. When subordinates felt unsupported as a result of their LM's flexibility i-deal, the arrangement was considered to be affecting the LM's ability to fulfil their role, as well as subordinate performance.

In line with previous research that has found POS and perceived supervisor support (PSS) to be associated (Eisenberger et al. 2002), this research identifies LMs as key agents in the provision of support to employees (specifically their own subordinates). Previous research has examined the



relationship between i-deals and POS, but those studies have tended to focus on the POS of employees with i-deals. The impact of i-deals on third-party POS or PSS has received little to no attention. This research suggests that even if flexibility i-deals lead to increased POS in employees who negotiate i-deals (e.g., Vidyarthi et al. 2014), the overall outcome for the organisations may be less positive as there could be a negative impact on the POS of (potentially multiple) third parties. In the case of LM flexibility i-deals, there is the potential for a negative impact on subordinate perceptions of support, particularly when the i-deal accommodates high levels of flexibility (discussed further below). Understanding the impact of flexibility i-deals, specifically LM flexibility i-deals in this case, on subordinate POS has important implications for employers given previous findings linking POS and organisational outcomes, such as job retention (Eisenberger et al. 2002). However, some caution is noted when comparing and applying the findings of previous work focused on PSS/POS to this research, as due to its qualitative nature neither PSS nor POS were examined through established measures as part of this study. Plus, within the existing literature PSS/POS are generally defined as beliefs that the supervisor/organisation values their contributions and cares about their well-being (Eisenberger et al. 2002), whereas here third-party descriptions were predominantly focused on the support subordinates receive, specifically, to carry out their role.

The focus by third parties on whether LM flexibility i-deals impact the support received by subordinates, as well as the consequences for LM and subordinate role fulfilment, highlights that subordinates' functional dependence - or task interdependence - on their LM is key to the perceived functionality of these arrangements. The influence of functional dependence between stakeholders on attitudes towards i-deals has been highlighted by existing research. Vidyarthi et al. (2016) found that when task-interdependence between team members was high, i-deals were viewed as less valuable by team members. Furthermore, Marescaux et al. (2019) found that when co-workers depend on an individual with an i-deal to execute their work, an i-deal is considered less (distributively) fair due to the negative impact on work planning and performance. The alignment between the findings of Marescaux et al. (2019) and this research highlights similarities in the way that flexibility i-deals function when they are held by individuals with or without line management responsibilities, and the way subordinates perceive and respond to their LM's i-deals compared to other co-workers. As such, subordinates are identified as a special type of co-worker, and some of the existing theory on co-worker responses to i-deals appears to be applicable to subordinates (but this cannot always be presumed). These findings have implications for the types of role that will and will not be most affected by LM flexibility i-deals, due to the level of functional dependence/task interdependence subordinates in those positions have on

their LM. Here, the findings emerged from both case organisations despite being situated in different sectors (financial versus construction services). The potential consequences of LM flexibility i-deals appear to be particularly relevant to roles where team working is common and necessary in order for employees to meet both individual and group output targets (see section 11.5 for practical implications). Extreme examples where task-interdependence between subordinates and their LM is limited may be immune to the impacts of LM flexibility i-deals. However, for most roles across various sectors LMs and subordinates will be, at least to some extent, reliant on each other in order to fulfil their work responsibilities. This leads to the potential for LM flexibility i-deals to be perceived as dysfunctional and as having a negative impact on performance (LM, subordinate and organisational).

Comparisons can also be made between the findings discussed here and those that emerged in response to research question three related to co-workers' assessments of flexibility i-deals. Co-worker concerns with the functionality of employee i-deals (whether the i-deal allowed the employee and third parties to successfully fulfil their role responsibilities) did not emerge strongly from the collected data. This is discussed as a potential limitation of the research (see section 9.6) and a topic that warrants further research, but this could also be a reflection of the functional dependence that may be high between LMs and subordinates, but is more variable between employees and co-workers.

The impact of LM flexibility i-deals on third-party perceptions as to whether LMs are fulfilling their role responsibilities also supports other existing theorising on flexibility i-deals. Rousseau (2005) suggested that individuals with flexibility i-deals may become marginalised due to their non-conformity and that subjective measures of their performance may be negatively impacted. While Rousseau's (2005) theorising was focused on top-down (or sideways) evaluations of performance, this research highlights that subordinates' subjective assessments of their LM's performance may also become less favourable if that LM has a flexibility i-deal.

Specifically, it was the degree of flexibility accommodated by a LM flexibility i-deal that appeared to influence how supported subordinates feel to carry out their job. LM i-deals accommodating higher levels of flexibility (see section 10.1.a) were more likely to lead to subordinates feeling unsupported and the arrangement being perceived as dysfunctional due to its impact on LM and subordinate role fulfilment. However, in response to lower-level LM flexibility i-deals, where the LM was present the majority of the time, subordinates were able to reprioritise their work-tasks or make minor adjustments to accommodate the arrangement, and were less likely to feel unsupported. These findings align to previous claims by Rousseau et al. (2006) that third-party

perceptions of i-deals are dependent on they whether they gain or lose as a result of the arrangement, and that such gain or lose scenarios for others are more likely when i-deals involve finite resources. Given that a LM's ability to provide support to their subordinates is time dependant (a finite resource within the context of a working day or week) a high-level flexibility i-deal has a greater impact on this finite resource if the subordinate can't access support when the LM is not physically present. Subordinates are therefore more likely to "lose" as a result of high-level LM flexibility i-deals that - in accordance with Rousseau et al. (2006) - would make them more likely to perceive the i-deal negatively and, as observed here, consider it dysfunctional. Plus, the association observed between high-level LM flexibility i-deals and subordinate perceptions that their role fulfilment is being negatively impacted, highlights another way that they may feel they lose out as a result of the i-deal. For example, subordinates may be concerned that barriers to performance could lead to losses in recognition, reward or opportunities to progress.

These findings also highlight differences from the existing research examining the outcomes of flexibility i-deals held by individuals without people management responsibilities (or when research samples do not differentiate between i-deals held by LMs or employees). For example, Vidyarthi et al. (2014) concluded that positive outcomes were associated with low- and high-level flexibility i-deals, but not i-deals allowing moderate levels of flexibility. Plus, Hornung et al. (2008; 2009) found a linear association between the level of flexibility accommodated by i-deals and outcomes. It appears that while similarities between the functioning of LM flexibility i-deals and general flexibility i-deals exist, differences may also emerge. The LM role and their relationship with their subordinates appears to impact on the optimum levels of flexibility accommodated by an i-deal in order to lead to positive outcomes. The different findings between this research and that of Vidyarthi et al. (2014) and Hornung et al. (2008; 2009) also highlight the importance of conducting multi-stakeholder research for understanding i-deal outcomes. These existing works explored i-deal outcomes from the perspective of the i-deal recipient and/or granter of the i-deal but did not explore the impacts on the perceptions of third parties. This research therefore adds to our existing understanding of the outcomes of flexibility i-deals by taking into account these additional stakeholders. Considered alongside the findings demonstrating the importance of task-interdependence between subordinates and LMs, there are implications for the functionality of LM flexibility i-deals in different settings. While these findings appear to apply across sectors, LM flexibility i-deals accommodating high levels of flexibility will be less problematic in the context of jobs where individuals work more independently, and more problematic when LMs and subordinates are more reliant on each other.

Existing research has increasingly recognised the role of LMs as the implementers of devolved HRM (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; McDermott et al. 2015) and their influence on subordinate attitudes and experiences (McDermott et al. 2013). However, this research also highlights LMs as the consumers of HR practices (specifically in this case, the use of i-deals as an approach to managing employment relationships), and the potential for this consumption to impact the experiences and attitudes of their subordinates.

Having established how the perceived functionality of LM flexibility i-deals is influenced by whether these arrangements impact on subordinate perceptions of support and role fulfilment (LM and subordinate), the next section theoretically considers the two mitigating (or exacerbating) factors found to act upon this relationship.

#### *11.2.b. Mitigating or exacerbating factors*

The research identifies two factors that act to mitigate or exacerbate the observed relationship between LM flexibility i-deals (specifically the degree of flexibility accommodated by the arrangement) and subordinate perceptions of being supported to carry out their role. These are: 1) access to support when the LM isn't physically present, and 2) the extent the subordinate is established in their role.

##### *11.2.b.i. Access to support in line manager's absence*

If subordinates are able to access support when their LM isn't present (e.g., because the LM works different hours or is working from home) the potential consequences of higher-level LM flexibility i-deals for subordinate perceptions of support and role fulfilment can be mitigated. These options for accessing support can include LM's being contactable and responsive when they are not physically present (e.g., over the phone or via email), or having a peer or another supervisor that subordinates can go to for assistance. When support is not accessible, even lower-level LM flexibility i-deals can become problematic and have negative impacts on subordinates feeling supported to carry out their work, leading them to view the i-deal as dysfunctional. For example, subordinates could end up feeling unsupported if their LM is very difficult to contact when they work from home, even if this is not a frequent occurrence.

The findings support previous descriptions of LM roles as multifaceted with competing priorities (Purcell and Hutchinson 2007; Hutchinson 2008; McDermott et al. 2015) because their supervisory responsibilities are in addition to their own individual outputs and role requirements. The findings reveal that to manage these multiple demands, some LMs with flexibility i-deals are

using time away from the office to focus on the non-supervisory elements of their job. However, this strategy may risk LMs being perceived by their subordinates as less contactable and responsive, leading to those subordinates feeling unsupported when the LM isn't physically present. Furthermore, the pressure to be to be contactable and responsive is found to not be limited to periods when LMs are telecommuting. The findings reveal LMs working outside of their agreed hours in order to support their subordinates' needs and to meet work deadlines. Considered against the findings discussed in Chapters 6 and 7, LMs may be willing to work beyond their agreed hours as a way of reciprocating for their flexibility i-deal that they perceive as supportive in nature. Nevertheless, such activity highlights the potential for LMs to experience role overload (McDermott et al. 2015; Wilkinson et al. 2017) and spillover as a result of their flexibility i-deal (Perrigino et al. 2018). Employees who take advantage of flexible working opportunities, like flexibility i-deals, have been shown to work longer hours (Baruch and Nicholson 1997, Golden 2001). This has clear benefits for employers and based on the findings of this research may support positive subordinate perceptions of LM flexibility i-deals, because they believe their LM is successfully fulfilling the duties of their role. However, existing research has highlighted downsides to work-spillover whereby employees experience feelings of guilt (Williams et al. 2013), anger (Butts et al. 2015) and reduced commitment to their organisation, ultimately leading to increased intentions to turnover (Ferguson et al. 2016). These negative consequences of work-spillover may counteract the determined benefits of granting supportive flexibility i-deals that are relational in nature (see section 7.1). Given these risks, the need to direct subordinates to alternative sources of support is further reinforced as a key mitigating factor against negative subordinate perceptions of LM flexibility i-deals, as if implemented effectively this strategy is less likely to lead to role overload and work-spillover for the LM. Future research should continue to integrate what we know of the challenges faced by LMs and those who work flexibly in order to develop practical recommendations for LMs with flexibility i-deals who manage multiple and competing demands.

While the findings highlight that subordinates can access support from other sources in their LM's absence, they also reveal that when this does not occur it is perceptions of the LM's provision of support, and perceptions of the LM's flexibility i-deal, that can be negatively affected. As such, the research once again highlights LMs as key agents of POS in the eyes of subordinates, supporting the interchangeable use of POS and PSS by existing research (Eisenberger et al. 2002). Even if others could step in in a LM's absence, it is ultimately seen as the LM's responsibility to provide support to their subordinates, resulting in perceptions that LMs are failing to fulfil their role

responsibilities (and preventing subordinates from performing) if those subordinates feel unsupported.

The identification of this mitigating (or exacerbating) factor in the relationship between LM flexibility i-deals and subordinate perceptions of support reinforces prior work highlighting the influence of informal LM acts on subordinate experiences and perceptions of HR policy and practice (Marchington and Wilkinson 2002; Whittaker and Marchington 2003). Furthermore, this research highlights that LMs' informal acts are influenced by their consumption of HR practices (in this case, being in receipt of a flexibility i-deal). While a LM's flexibility i-deal and its characteristics (the degree of flexibility, dictating how often and when the LM is physically present) impacts upon subordinate perceptions of support and their assessments of the i-deal, so does the LM's informal responses to these arrangements (e.g., whether they are contactable and responsive when working from home, or whether they identify and direct subordinates to alternative sources of support).

Despite these findings, the research also identifies some LMs' reluctance or failure to arrange alternative sources of support for their subordinates, especially if these options could be perceived as adding to the workload or responsibilities of their peers (e.g., co-workers or other LMs). Further, when LMs presumed support would be provided by others in their absence, there was a risk that subordinates would be left without support at all, as other stakeholders were in disagreement as to whom this responsibility should fall to. Thus, this research highlights that without a formally agreed alternative, the provision of support to subordinates risks falling between the gaps of different individuals (cf. McDermott et al. 2015) when LMs aren't physically present.

These findings also suggest that LM flexibility i-deals may impact situated learning when LMs fail to identify and formally provide employees with alternative sources of support for periods when they are absent. Situated learning theory, developed by Lave and Wenger (1991), is focused on learning through participation rather than the acquisition of knowledge (Sfard 1998). Situated learning theory states that effective learning takes place in the context where it will be used, and highlights the importance of co-location with others for learning through "communities of practice" where individuals share knowledge (Lave and Wenger 1991). However, the relevance and applicability of learning through participation in communities of practice to contemporary organisations and work experiences has been questioned (see Amin and Roberts 2008). Consequently, the identification of organisational practices that may impact upon situational learning, rather than just the specific organisational communities, has been encouraged

(Macpherson and Clark 2009). This research suggests that LMs may be key agents to employees' situated learning and demonstrates that when LMs and employees are not co-located due to a LM flexibility i-deal, it should not be presumed that co-workers can or will automatically fulfil the LM's vital role. A potential explanation for this finding could be the core role LMs are viewed to play in POS, resulting in co-workers (subordinates themselves) being reluctant to step in and fulfil a responsibility firmly believed to lie with the LM. As such, this research suggests that in some organisational settings, communities of practice do not always naturally form or occur: variances that research should continue to explore.

Plus, Macpherson and Clark (2009) highlight the potential for "islands of practice" where, because individuals prefer to look after their own team, situated learning fails to breakthrough boundaries between discrete groups. Thus, when a LM and an employee are not co-located due a LM flexibility i-deal, other LMs may also fail to step in and support that subordinate of their own accord, due to them prioritising their own team members. Given that flexibility i-deals will commonly result in a reduction in co-located working, future research examining the consequences of flexibility i-deals may benefit from further integration with situated learning theory. This research highlights that situated learning considerations are not only relevant to flexibility i-deals which take subordinates away from shared workspaces, but also to LM flexibility i-deals given the potentially key role of LMs to the situated learning of their team members.

Further, the research highlights the challenges LMs face when trying to meet the needs and demands of multiple stakeholders (subordinates, peers and their own management chain). Rousseau et al. (2006, p.988) note that "a person receiving an i-deal can engender a more positive response from colleagues by taking steps to minimise any adverse impact." However, this study reveals that for LMs with flexibility i-deals this can lead to a paradox. Should managers take steps to minimise the impact of their flexibility i-deal on their subordinates, for example by identifying co-workers or alternative supervisors they can go to for support when they aren't present, this may burden those individuals who subsequently perceive and respond to the i-deal negatively. However, if LMs fail to put such arrangements in place, downplaying or over-looking the need for alternative support routes, subordinates suffer and perceive the LM flexibility i-deal as dysfunctional. Again, the impact of task-interdependence between relevant stakeholders on the successful functioning of LM flexibility i-deals is highlighted here, and this paradox is less likely to occur when LMs and subordinates work more independently of each other. These findings also highlight the potential for LM flexibility i-deals to increase LM and subordinate interdependency with other supervisors and/or co-workers, as the arrangements lead to additional stakeholders

becoming intertwined in the provision of support and completion of others' tasks. While this more collaborative approach may work for some more generalist roles, for others where the provision of support to subordinates requires very specialist knowledge, LM flexibility i-deals may be more problematic as others may not be sufficiently able to provide the help or guidance that is required in the LM's absence.

The research provides support for previous work emphasising the competing demands on LMs (Purcell and Hutchinson 2007; Hutchinson 2008; McDermott et al. 2015), leaving them as "the piggy in the middle" (Hutchinson 2008, p.1) of various stakeholders who assess the effectiveness of HR practices against differing criteria (Tsui 1984; Guest and Bos-Nehles 2013). When LMs are faced with the choice of which stakeholder to protect from any consequences of their flexibility i-deal, they are likely to prioritise the assessments of their own manager who may have the authority to terminate the arrangement. Furthermore, a LM's peers are likely to be in closer proximity to the upper management chain, increasing their opportunity to provide feedback on the i-deal in comparison to subordinates, adding weight to the relative importance of their assessments of the arrangement. These influences, combined with past findings that in some settings LMs are not always assessed in the people management aspects of their role (Boaden et al. 2008), can leave subordinates at the bottom of the metaphorical pile of stakeholders that LMs try to keep happy and protect from any adverse effects from their flexibility i-deal.

These findings have, again, identified differences in the manner in which LM flexibility i-deals function compared to those examined by existing research, reinforcing the importance for future i-deals research to distinguish between arrangements held by those with and without line management responsibilities. The findings highlight the value of, and need for, multi-stakeholder research into i-deals. More multi-source research is particularly needed to examine these LM i-deals for which there are numerous interested parties at different levels within organisations: the attitudes and responses of whom all impact upon the functionality of these arrangements. Future work should explore LM flexibility i-deals from the perspectives of the other LMs and co-workers who may step in to provide support in the LM's absence, plus the higher management chain to understand how the supervision of LMs and their i-deals impacts on their functionality.

The next section explores the second mitigating/exacerbating factor on the relationship between LM flexibility i-deals and subordinate perceptions of support (and consequently the functionality of the arrangements): the extent to which the subordinate is established in their role.



### *11.2.b.ii. Well- versus less-established subordinates*

The extent to which subordinates were established in their role was also determined to influence the relationship between LM flexibility i-deals and subordinate perceptions of support. When a subordinate is not yet established in their role, perhaps as a result of being new to the organisation, team or job, they can feel more severely impacted by a LM flexibility i-deal. Less-established subordinates need an increased amount of support in order to carry out their work tasks and responsibilities, but have not yet built up the strong relationships with their LM or co-workers that would help them access this support when their LM isn't present. In contrast, well-established subordinates appear to be less negatively affected by LM flexibility i-deals, as they generally need less support to carry out their role, and the relationships they have built up allow them to access support more easily when their LM is not physically present.

Once again, these findings reinforce the key influence of the functional dependency between individuals with i-deals and third parties, on the outcomes and assessments of those i-deals (Vidyarathi et al. 2016; Marescaux et al. 2019). They also highlight how LM flexibility i-deals can impact upon the situated learning employees need to undertake. Subordinates who are less established in their role are more dependent on observation and guided practice when engaged in situated learning (Lave and Wenger 1991). They may need to be shown and guided through their exact responsibilities and/or trained in the skills needed to carry out their tasks.

Consequently, these less-established subordinates are more functionally dependant on their LM's physical presence in the workplace. This can be particularly prominent for, for example, recent graduates or individuals who have recently started in a particular career or field and may need support in learning every aspect of their new job. In contrast, individuals who have relevant past experience but have, for example, changed employers may only need guidance in their new organisation's specific processes. Either way, this functional dependence and (situated) learning decreases as subordinates become more established and familiar with their job and need less frequent support to successfully execute their role.

Further, this mitigating/exacerbating factor highlights that the interchangeable nature of POS and PSS (Eisenberger et al. 2002) may be even more relevant to less-established employees who are not aware of or able to access other sources of support. Plus, the LM's consumption of HR practices is once again shown to influence these less-established employees. When a LM's flexibility i-deal physically removes them from a less-established subordinate, that subordinate perceives those practices negatively (as dysfunctional, in the case of LM flexibility i-deals) because they do not know where else to go for support. Consequently, the need for LMs to put in place

formal arrangements for others to support subordinates in their absence is even more important when the subordinate is less established. The lack of relationships built up between these less-established subordinates and other employees makes accessing support informally more challenging, and the provision of support to these individuals may be more likely to fall through the gaps between other stakeholders (cf. McDermott et al. 2015).

Having fully explored the first pathway determined by the research findings, focused on the perceived functionality of LM flexibility i-deals, the chapter now moves to examine the second pathway which considers the perceived (distributive) fairness of LM flexibility i-deals.

### *11.3. (Un)fair line manager flexibility i-deals and the perceived availability of flexible working*

The second pathway focuses on the potential for trickle-down effects from LM flexibility i-deals and how these impact third-party assessments of the arrangements as distributively fair or unfair. It proposes how LMs' behaviour in response to their own flexibility i-deals impacts subordinates' experiences of working flexibly, and subsequently their perceptions of whether flexible working is widely available or only accessible by those higher up the organisation.

In response to their flexibility i-deals, some LMs become advocates for flexible working. This results in their subordinates experiencing increased flexibility themselves. In such scenarios, the same trickle-down effects that were identified by Rofcanin et al. (2018) for LM work-task and developmental i-deals are observed. These findings demonstrate how LM flexibility i-deals *can* signal to employees that flexible working is appropriate, because LMs are often viewed by subordinates as a representative or agent of their organisation (Gerstner and Day 1997; Purcell and Hutchinson 2007). Furthermore, they signal to subordinates that requests to work flexibly are likely to be granted (cf. Rofcanin et al. 2018). LMs (with flexibility i-deals) are in a position to authorise flexible working arrangements (see section 5.1) and may be sympathetic to subordinate motivations for wanting to work flexibly if they align to their own. Plus, they may also believe in the benefits of flexible working for the employer and employee. When LMs respond to their flexibility i-deals in this way, subordinates believe the i-deal is fair because they perceive flexible working options to be widely available across all levels of the organisation. The research therefore provides support for the suggestions of Rousseau et al. (2006), and subsequently supported by Lai et al. (2009), that i-deals are more likely to be perceived positively by co-workers if they believe they can access them too, and the findings of Collins et al. (2013) that co-workers perceive peers' flexibility i-deals as fair as long as they achieve their own personal levels of temporal flexibility.

The findings extend upon this existing work by indicating that these effects also apply to subordinate perceptions of LM flexibility i-deals.

However, the trickle-down effect from LM flexibility i-deals was tempered and did not always occur. The findings show how some managers, in response to their flexibility i-deal, were instead restricting flexible working options for their subordinates in attempts to mitigate any negative consequences from their arrangement. In this scenario, subordinates believe flexibility is only available to those in senior positions and perceive LM flexibility i-deals as unfair. Subordinate perceptions of the fairness of LM flexibility i-deals being based on its allocation/the availability of flexible working options suggests their concerns are predominantly focused on the distributive justice of these arrangements. The findings suggest subordinates believe it is unjust for flexibility i-deals (as one example of opportunities for flexible working within organisations) to be distributed according to organisational hierarchy or seniority. It is possible that this perceived injustice is based on beliefs that this distribution does not align to any acceptable distributive justice allocation principles, but demonstrates an abuse of power whereby the members of an organisation who gatekeep these opportunities reserve them for themselves.

This power imbalance between LMs and their subordinates is relevant for these findings and their implications for organisations. Not only could it influence how subordinates perceive the fairness of LM flexibility i-deals, as just highlighted, but it may also affect how subordinates experience and respond to this injustice. The findings show that LM flexibility i-deals are perceived as unfair when subordinates view the arrangements as only available to those in more senior positions, having had their own opportunities to work flexibly restricted. As such, subordinates are not just observers of unfair LM flexibility i-deals, but also inherently experience this distributive injustice themselves. The implications of (un)fair LM flexibility i-deals for organisations are therefore consequential given previous findings linking distributive justice perceptions with numerous employee attitudes, including job satisfaction (McFarlin and Sweeney 1992; Haar and Spell 2009), turnover intentions (Haar and Spell 2009), and affective commitment (Murphy et al. 2006), as well as organisational outcomes such as actual turnover (Jones and Skarlicki 2003; Brashear et al. 2005).

Again, comparisons can be made between this study's findings related to subordinate assessments of LM flexibility i-deals as fair, and those focused on co-worker judgements of flexibility i-deals (Chapters 8 and 9). While co-workers are concerned with employee need for a flexibility i-deal, such considerations did not emerge from this research as relevant to subordinate assessments of LM flexibility i-deals. This difference warrants further exploration given that need

is one of the established distributive justice allocation criteria. Future research should seek to understand how hierarchical differences between parties impact how they assess the fairness of i-deals, as well as the distribution of resources within organisations generally.

The research highlights the difficulties LMs face in managing the demands of multiple stakeholders (Purcell and Hutchinson 2007; Hutchinson 2008; Guest and Bos-Nehles 2013; McDermott et al. 2015), and the potential for them to experience a paradox when they try to minimise any negative effects from their i-deals for others (cf. Rousseau et al. 2006). The findings demonstrate some LMs attempting to protect some face-to-face time with their team, or ensure there is a physical presence in the office to engage with other stakeholders, but doing so in a way that restricts flexibility for their subordinates who consequently view the LM's flexibility i-deal as unfair. Once again, these findings support the suggestion by Rousseau et al. (2006) that i-deals involving finite resources are more likely to lead to gain or lose scenarios and that this will impact third-party assessments of i-deals. Subordinates may come to view flexibility as a finite resource in scenarios such as this, whereby LMs' access to flexibility directly leads to reduced flexibility for themselves, leading them to believe they are losing out as a direct consequence of their LM's i-deal.

As discussed in section 11.2.a, the findings have already highlighted LMs as the consumers of HR practice, how this impacts their formal and informal management acts, and subsequently the attitudes and experiences of subordinates. Here, the research goes further and highlights the potential for LMs to *simultaneously* be the consumers and implementers of HRM, as LM flexibility i-deals are shown to influence the way LMs manage flexible working options for their team. In line with existing theorising (Marchington and Wilkinson 2002; Whittaker and Marchington 2003; Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; McDermott et al. 2013; 2015), the findings show that LM implementation of HRM impacts upon subordinate attitudes and experiences of HR practices, in this case their opportunities to work flexibly, their perceptions of the availability of flexible working, and consequently their assessment of their LM's i-deal as fair or unfair. Understanding the potential for LMs to simultaneously be the consumers and implementers of HRM has important organisational consequences. As highlighted above, it allows for potential abuses of the power that LMs have over their subordinates whereby they retain opportunities or resources for themselves. This simultaneous consumption and implementation of HRM by LMs means subordinate assessments of LM flexibility i-deals are not just third-party observations of an outcome, but an injustice they experience for themselves. The potential implications of (un)fair LM flexibility i-deals should not be overlooked by organisations, given past

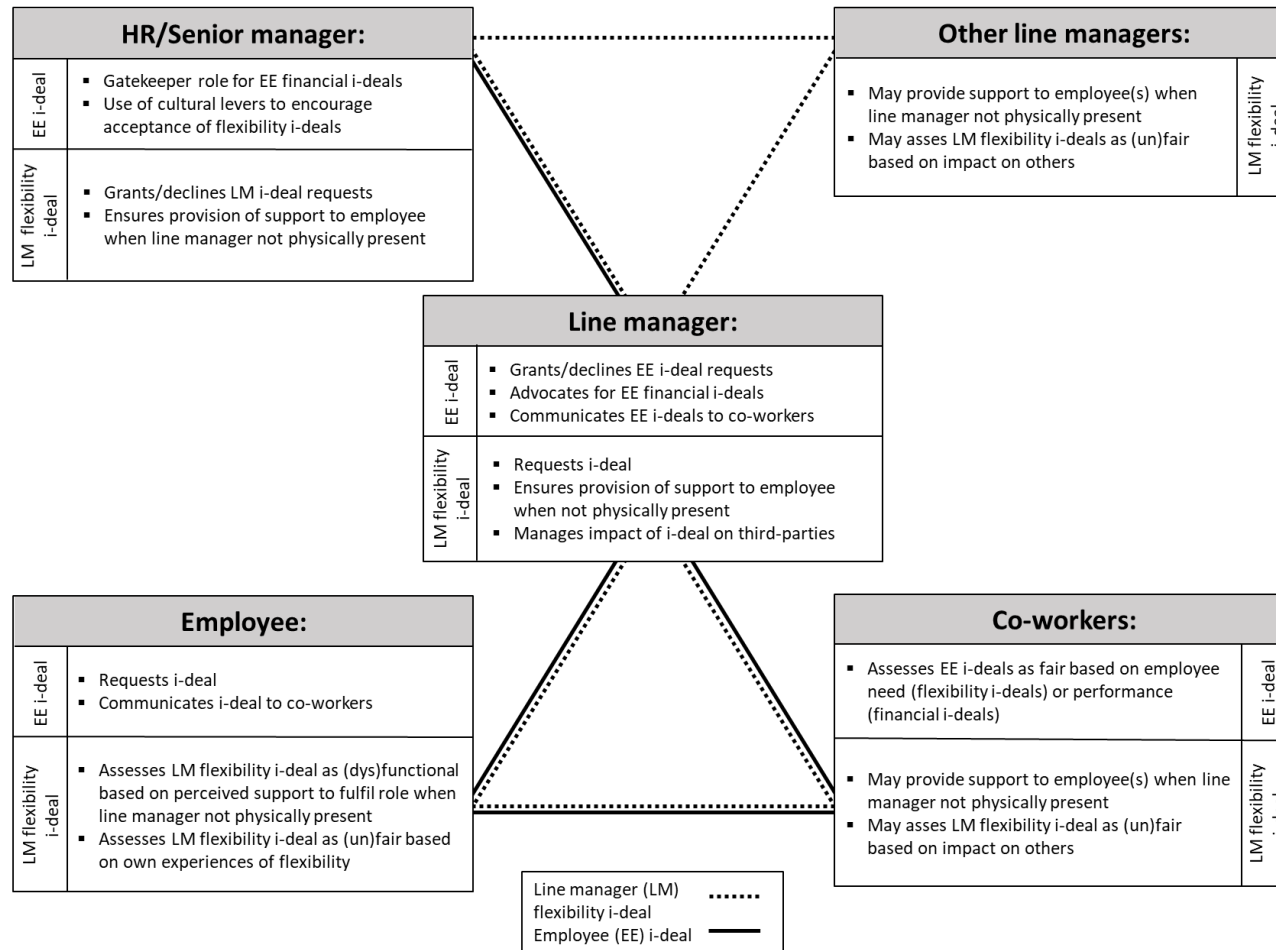
associations found between distributive justice perceptions and both employee attitudes and organisational outcomes (see above).

The two different responses that LMs may take to their flexibility i-deals supports previous work suggesting LM implementation of HRM is often discretionary and distinguishes between intended/espoused and actual/enacted HR (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Wilkinson et al. 2017; Fu et al. 2020). Given that the importance of clear policy and procedure for the effective and consistent implementation of HRM by LMs has been emphasised (Purcell and Hutchinson 2007; Guest and Bos-Nehles 2013; Fu et al. 2020), it is not surprising that LMs have diverse reactions to flexibility i-deals. As approaches that inherently fall outside of standardised HR policies and procedures, the intended approach to using i-deals as a HR practice may not even be outlined as a starting point for LMs.

Finally, the research raises the question of whether the tempered trickle-down effect observed here applies to other types of i-deal but as of yet has only been partly identified (cf. Rofcanin et al. 2018), or whether it is specific to flexibility i-deals. Furthermore, what has not been determined by this research was why some LMs respond to their flexibility i-deal in one way or another. Future research should explore potential influences (e.g., leader-member exchange, LM traits) on these divergent responses.

#### *11.4. I-deals as multi-party arrangements*

The findings in response to research question four combined with the rest of the study's findings highlight new roles and stakeholders relevant to the formation and functioning of i-deals that future research should pay closer attention to. The nature of these stakeholders' interactions with i-deals is dependent on whether the recipient of the i-deal has line management responsibilities. These relevant parties and interactions are summarised in Figure 11.2. This figure extends upon that presented by Rousseau et al. (2016) that highlights employees, LMs and co-workers as the relevant and interested parties to i-deals (see Figure 2.1 in section 2.10).



**Figure 11.2. The multiple interested parties to the formation and functioning of i-deals.**

### *11.5. Practical implications*

Practical implications for numerous organisational stakeholders arise from the findings described and discussed throughout this chapter. LMs are encouraged to proactively consider and plan how subordinates will access support when they are not physically present as a result of their i-deal. This is particularly relevant if they desire a high-level flexibility i-deal which has been found to be associated with subordinates feeling unsupported, or if they manage a specialist who may not be able to access the support they need from peers or other LMs. When working away from the office, LMs should remain contactable and responsive to their subordinates, and proactively and regularly check in with less-established team members as these employees may not instigate contact even when they require support. While LMs with flexibility ideals may feel obliged or under pressure to be available for their teams outside of their agreed working hours, as an alternative they are encouraged to formally identify and agree alternative sources of support (co-workers or other LMs) for subordinates to access in their absence. LM strategies to manage the consequences of their flexibility i-deal that involve restricting flexible working options for their subordinates are flagged as particularly detrimental to subordinate attitudes and experiences, and should be avoided. Instead, LMs are implored to discuss their arrangement and its impact with all those affected by its creation. Open communication between LMs and their own manager, their subordinates, and their peers in order to jointly agree how to best manage and balance the impacts of the arrangement will help prevent negative perceptions of the i-deal from third parties.

Similarly, subordinates are encouraged to consider and communicate ways that they could more easily access support when their LM is absent, especially if they feel their LM's flexibility i-deal is impacting their own ability to perform. For example, options could include requesting more regular catch-ups when their LMs is working from home, or asking for a more experienced colleague to be formally assigned as a mentor. This solution-focused approach to responding to any difficulties subordinates may experience as a result of their LM's flexibility i-deal is encouraged as when appropriately managed, LM flexibility i-deals can have beneficial trickle-down effects for these subordinates.

Despite i-deals falling outside of the scope of standardised organisational policy, guidance for LMs on the management of flexibility i-deals from HR practitioners and senior managers is encouraged. This is particularly important for LMs with i-deals themselves, as their arrangements can highlight perceived distributive injustices to subordinates if they are not able to work flexibly. HR and senior managers should also work with LMs to find solutions to work overload and the

competing priorities that are inherent to the multifaceted LM role. Without this support, LMs with flexibility i-deals may struggle to balance the demands on their time, which can result in negative perceptions from subordinates and work-spillover for the LM.

The creation of LM i-deals accommodating high-levels of flexibility or within specialist teams are flagged to senior managers (likely to be the employer representative who authorises the creation of these i-deals) as potentially having a negative impact on subordinates feeling supported. However, denying requests for LM flexibility i-deals in these circumstances can lead to organisations missing out on the broad behavioural benefits of granting supportive flexibility i-deals to employees (see section 7.6). Instead, wherever possible, senior managers should work with LMs during the negotiation of i-deals to identify ways their subordinates can access support in these scenarios, so that the i-deal can be granted but not be perceived as dysfunctional by third parties. Senior managers may also need to step in to assist the formal implementation of strategies for subordinates to access support from co-workers or other LMs when a LM with a flexibility i-deal is absent from the office. If these third parties are resistant to taking on these additional responsibilities, senior managers are encouraged to highlight that supportive flexibility i-deals offer opportunities and can be made available to a wide range of employees. When different stakeholders work together so these arrangements function successfully, there is no reason for flexibility i-deals to be exclusive and can instead reveal opportunities for these third parties to negotiate their own personalised arrangements now or in the future.

### *11.6. Limitations*

The typology proposed by this research presents the functionality and fairness of LM flexibility i-deals from the perspective of third parties, most notably subordinates. However, this research has reinforced the multi-party nature of i-deals and identified numerous other relevant stakeholders to LM flexibility i-deals. These include the higher management chain whose perspective requires further exploration and whom may have different criteria for the success of these arrangements. In particular, the proposed functionality of LM flexibility i-deals is based on the subjective subordinate perceptions of their LM's role fulfilment (as well as the subsequent impact on their own performance). However, other methods of assessing the performance of LMs with flexibility i-deals may reveal an alternative viewpoint on the outcomes of these arrangements.

Based on the data collected by this exploratory research, the findings highlight two separate pathways to: 1) (dys)functional and 2) (un)fair LM flexibility i-deals. However, it is possible that



these pathways are not entirely discrete and, for example, i-deals that are perceived as (dys)functional are also more likely to be perceived as (un)fair. This possibility is highlighted by the findings of Marescaux et al. (2019) that the functional dependence between employees and co-workers impacts fairness perceptions of the employee's i-deal. Future work applying the principles of the typology proposed by this research may benefit from utilising established survey measures for distributive justice to determine whether the principles of functionality established here impact upon third-party perceptions of LM i-deals as fair, or vice versa.

Further, the perceived fairness of LM flexibility i-deals was focused on the distributive justice of the arrangement, and considerations of procedural and interactional justice did not emerge from the collected data on this theme. Procedural and interactional justice are established dimensions of organisational justice theory, have previously been considered as important to the creation of fair i-deals (e.g., Greenberg et al. 2004), and were (potentially in the case of procedural justice) shown to be relevant to co-worker perceptions of i-deals by this research (see Chapter 9). It is therefore possible that considerations of procedural and interactional justice are relevant to subordinate perceptions of LM flexibility i-deals but have not been identified here. Consequently, future work may benefit from further exploring LM i-deals through the lens of organisational justice theory in order to determine any influences of procedural or interactional justice, or to try and identify why these considerations may be less relevant to subordinate perceptions of fairness.

### *11.7. Summary of contribution*

With the single exception of Rofcanin et al. (2018), existing research has failed to differentiate between i-deals held by individuals with and without line management responsibilities. By collecting data from LMs and subordinates, this research has identified two pathways highlighting the distinct nature of flexibility i-deals held by LMs. This research therefore demonstrates the importance of future i-deals research distinguishing between LM and subordinate i-deals. The first pathway is focused on the consequences of LM flexibility i-deals on perceived role fulfilment (subordinate and LM) due to the impact on subordinates feeling supported to carry out their role. The second examines a tempered trickle-down effect from LM flexibility i-deals, whereby, dependant on the LM's response to the arrangement, their subordinates either experience increased or restricted opportunities to work flexibly themselves. These experiences influence subordinate perceptions of the availability of flexible working opportunities across their organisation, and subsequently whether LM flexibility i-deals are (distributively) fair. These pathways are combined to propose a typological model of the perceived functionality and fairness of LM flexibility i-deals, and the implications for employees and organisations.

Theoretically, subordinates are identified as a special type of co-worker, with certain similarities observed in the way they judge i-deals as co-workers generally (as determined by the existing literature). However, the research also reveals differences in the functioning of LM flexibility i-deals compared to those previously explored. The challenges LMs face in managing the demands and expectations of multiple stakeholders across different levels of organisations can lead to paradoxes for LMs, whereby their attempts to mitigate against any adverse effects for some stakeholders can lead to negative consequences and attitudes in others. The research supports and extends existing research focused on the delivery of HRM by demonstrating that, viewed as a proxy for the organisation (Gerstner and Day 1997; Purcell and Hutchinson 2007), LM consumption of HR practice, their informal actions, and their implementation of HRM all act to significantly shape subordinate experiences and attitudes.

## 12. Conclusion

The aim of this study was to enhance understanding of the multiple relevant perspectives on i-deals. This concluding chapter provides a brief summary of the thesis in support of this aim. It then presents the overarching contributions (empirical and methodological) and practical implications of the study, as well as an agenda for future research.

### *12.1. Summary of thesis*

The research explores multiple stakeholders' experiences of the formation and functioning of i-deals. Generally, the extant literature has prioritised examining i-deals from the perspective of the employee, as well as determining positive outcomes from i-deals through quantitative analysis (Liao et al. 2016). Given the multi-party nature of i-deals, the qualitative approach taken by this study has allowed for a deep and holistic understanding of how i-deals are formed and function in the eyes of all of the relevant stakeholders to these arrangements. Four research questions guided the study in order to enhance our understanding of different stakeholders' attitudes and experiences of i-deals. The first three were established pre-data collection based on a review of the existing literature. The fourth was developed due to the strong, unanticipated themes emerging from the early collected data, highlighting the value of qualitative methods for theoretical development. The four research questions were:

- 1) What are employers' motivations for granting i-deals, and under what conditions are they made available to employees?
- 2) How do employer motivations and conditions for granting i-deals shape employee perceptions and responses (attitudes and behaviours)?
- 3) Why and how do co-workers assess i-deals as fair or unfair?
- 4) How do line manager flexibility i-deals shape subordinate experiences and attitudes?

Research questions one to three were explored through examining stakeholder experiences of flexibility and financial i-deals. Exploring experiences of financial and flexibility i-deals allowed for the consideration of the role of timing (ex-post versus ex-ante) in the formation and functioning of i-deals. In contrast, other types of i-deal (e.g., task and developmental i-deals) require insider knowledge and tend to be negotiated ex-post (Simosi et al. 2021). As a type of i-deal that is most

often visible to others and can have the most visible impact on others, research question four specifically examined experiences of and attitudes to line manager (LM) flexibility i-deals.

A broad theoretical awareness was adopted to support the exploration of the research questions. Theories of social exchange, organisational justice, social resources, and the literature focused on the role of LMs, were all drawn upon as lenses through which to consider employee, LM, HR, co-worker and subordinate experiences of i-deals. The use of multiple theories aligned to the multi-stakeholder and abductive approach taken by this research. A qualitative, exploratory methodology, underpinned by interpretative phenomenology was adopted.

The research findings were presented and then theoretically explicated, broken down by research question (with the findings in response to RQ1 and RQ2 considered together). The overarching contributions of the research are summarised below.

### *12.2. Contributions of the research*

The key contributions and implications of this thesis will now be outlined. The methodological and theoretical contributions will be emphasised, the practical implications that have been presented throughout the discussion chapters will be summarised, and an agenda for future research put forward.

#### *12.2.a. Empirical and theoretical contributions*

The research makes three overarching contributions to the i-deals literature with both empirical and theoretical components.

First, the research has identified distinct employer motivations and conditions for granting i-deals that are reserved for high performers versus those that are more widely available. These motivations and conditions are identified as key to understanding employee responses and i-deal outcomes. Two outcome pathways are theorised based on employee perceptions as to why and on what basis their i-deal was granted. These pathways suggest that market-based i-deals (exclusively reserved for those with the highest market value) are transactional and have specific, functional benefits to organisations, while supportive i-deals that are available more widely to trusted employees can have broader relational (attitudinal and behavioural) benefits through acts of reciprocation. The existing literature has highlighted the importance of i-deals being perceived as fair by co-workers in order to function successfully (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016). To support perceptions of fairness, it has been advised that managers be open to granting i-deals to many workers (Rousseau et al. 2016). Crucially, through supportive i-

deals, this research contributes to the field by revealing a pathway to positive outcomes not reliant on i-deals being exclusive arrangements reserved for “stars” (cf. Bal 2017, p.14), but that can be broadly distributed. Broadly distributed supportive i-deals may also act as the precursors and trials for organisational policy change, as has been discussed since early on in the conceptualisation of i-deals (Rousseau 2001; Rousseau et al. 2006). In contrast, market-based i-deals are likely insufficient to build quality relationships with high performing employees or to be accompanied by positive employee attitudes. Thus, the research contributes to the field by suggesting that, despite the i-deals literature predominantly developing around notions of star performers (Bal 2017), supportive i-deals may be of greater interest to employers as tools for introducing flexibility into their management practices. Furthermore, the existing literature has tended to empirically overlook ex-ante i-deals and financial i-deals. By exploring experiences of these arrangements this study contributes to our understanding of the influence of the timing and content of i-deals. The content of i-deals appears to influence LM motivations and conditions for granting the arrangements (and the subsequent proposed outcome pathway). Flexibility i-deals tended to be more supportive in nature, and financial i-deals market-based. However, the timing of negotiation is also relevant as ex-ante negotiation of flexibility i-deals may be more associated with market-based arrangements and specific functional outcomes, rather than behavioural responses.

Second, the research helps broaden our understanding of co-worker attitudes towards i-deals. Co-workers have previously been identified as key third parties to the functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), yet empirical explorations have been lacking relative to those interested in the employees in receipt of the arrangements. Theoretically, past research has often reduced co-workers’ distributive justice concerns to that of equity alone. This research provides insight into not only why co-workers assess flexibility and financial i-deals as fair (including what constitutes a fair i-deal in the eyes of co-workers) but also how they form these judgements, revealing influences and information that inform their assessments. Based on these empirical findings, theoretical models are proposed detailing co-workers’ adoption of and assessment against socially acceptable criteria for assessing i-deal fairness. Starting with their adoption of fairness criteria, the research adds to existing knowledge by highlighting that upon first encountering i-deals, co-workers may be inclined to judge them as unfair exceptions to organisational policy. However, through consistent exposure to fair i-deals, co-workers can become more accepting of their creation and adopt socially acceptable allocation principles against which to assess their fairness (*need* for flexibility i-deals, and *equity* for financial i-deals). The resources on offer via i-deals influence the socially acceptable criteria that co-workers adopt

to assess their fairness, and the research highlights the potential for co-workers and employers to perceive the nature of these resources differently (reinforcing the importance of considering i-deal formation and functioning from multiple perspectives, discussed further in section 12.2.b). As for co-workers' assessment of i-deals against socially acceptable fairness criteria, shared understandings of needing a flexibility i-deal are identified, but shared experiences with the employee may also be influential. Given these findings, the thesis considers how co-workers' conceptualisation of *needed* flexibility i-deals can be broadened so that employers and an increased number of employees can reap the benefits of broadly distributed, supportive flexibility i-deals, without risking negative third-party reactions. To assess the (internal) equity of financial i-deals, the research suggests that co-workers rely on their own observations of the employee's performance, and make social comparisons between their own and the employee's perceived input-output ratio. If an organisation offers sub-market compensation, co-workers' being predominantly concerned with the internal equity of financial i-deals may be incongruent with an employer focus on external equity/market-value when creating these arrangements, leading to perceptions of (distributive) unfairness. By exploring co-worker attitudes and experiences of ex-post and ex-ante i-deals, the research once again contributes to our understanding of i-deal timing. The study reveals co-worker recognition of the leverage afforded to employees by the recruitment market, potentially influencing those co-workers' perceptions of financial i-deals as (externally) *equitable* but not flexibility i-deals as *needed*.

Third, the research contributes to the field by explicating stakeholder experiences of LM flexibility i-deals. With the single exception of Rofcanin et al. (2018), existing research has failed to differentiate between i-deals held by individuals with and without line management responsibilities. Empirically, two pathways were determined that reveal influences on subordinates' experiences of LM flexibility i-deals. The nature of the LM-subordinate relationship is emphasised as influential to stakeholder experiences of LM flexibility i-deals. As such, subordinates are identified as a special type of co-worker, with both similarities and differences identified between the influences acting upon subordinate assessments and experiences of i-deals and those identified in the extant literature examining co-workers generally. The significant role LMs play in perceived organisational support can have implications for role fulfilment (LM and subordinate) when LMs with flexibility i-deals aren't physically present for their subordinates. Plus, LMs being the individuals who grant or deny flexible working options influences their subordinates' perceptions of their own access to flexible working options and their assessments of LM flexibility i-deals as fair or unfair. The research proposes a typology of LM flexibility i-deals as (dys)functional and distributively (un)fair as perceived by third parties, including implications.

By exploring experiences of LM flexibility i-deals, the challenges faced by LMs who work flexibly are also highlighted. The research reveals paradoxes, and risks of work-spillover and role overload faced by LMs as they try to mitigate against any adverse effects from their flexibility i-deals for multiple stakeholders across different levels of the organisation. Finally, the thesis extends upon existing research on LMs as the implementors of devolved HRM by highlighting the consequences of their consumption of HR practice.

#### *12.2.b. Methodological contributions*

The research also makes methodological contributions to the i-deals literature through its 1) exploratory and qualitative, and 2) multi-stakeholder approach.

As discussed in section 2.9, despite the calls for qualitative i-deals research (Hornung et al. 2009; Hornung, Glaser and Rousseau 2011; Liao et al. 2016) quantitative analyses have dominated the field. This dominance is not unique to the i-deals literature. Management and HRM research that incrementally advances knowledge, for example through adding mediating or moderating variables to existing models, is more prevalent than work that takes methodological or theoretical leaps (Harley 2015). The tendency within the i-deals literature to focus on determining employee-level responses (Liao et al. 2016) in order to gain insight into the performance implications of these arrangements is also mirrored within management and HRM research generally (Harley 2015). Neither a wholly quantitative or qualitative approach is superior, but the current lack of methodological diversity restricts the types of questions research can ask and answer (ibid). The qualitative, exploratory approach adopted by this study complements the existing quantitative analyses and has allowed for the emergence of a more nuanced and enriched understanding of stakeholder experiences of i-deal formation and functioning. The value in this study is not in attempting to definitively answer questions and fill in specific gaps in our knowledge, but to explore scenarios and theorise possible explanations to both broaden and deepen thinking related to i-deals. Flexible in its approach, the research draws on a broader range of sources to support this theorisation, in comparison to studies testing tightly specified hypotheses. As such, the findings from this qualitative, exploratory study are not intended to be statistically generalisable, but inform theoretical development and models, and a future research agenda (see section 12.2.c).

Further, while being able to adopt established measures is often considered a benefit of quantitative research (Harley 2015), existing survey measures have been criticised as failing to operationalise key features of i-deals (Conway and Coyle-Shapiro 2016). The more flexible

approach to data collection supported by semi-structured qualitative interviews allowed for, where necessary, additional questioning around the arrangements described by respondents to ensure that they met the defining characteristics of i-deals. The (comparative) case study design was also influential, allowing for the contextual understanding that allowed for described i-deals to be differentiated from organisational or normative HR practices.

Despite early acknowledgement that i-deals are multi-party arrangements (Rousseau 2005; Rousseau et al. 2006) and general calls for multi-stakeholder research examining organisational phenomena (Troth and Guest 2019), there has been a deficit in research considering i-deals from multiple perspectives (Conway and Coyle-Shapiro 2016; Liao et al. 2016). The multi-stakeholder approach taken by this research has contributed to our understanding of the i-deals in numerous ways. This study highlights a link between employer motivations and conditions for granting i-deals, employee perceptions of those motivations and conditions, and subsequently employee responses to their i-deals. Co-worker assessments of i-deals remain empirically overlooked, despite the acknowledgement of their importance (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016). By exploring the co-worker perspective, this research reveals how their understanding of the reason a flexibility i-deal was requested, and potentially their shared experiences of that reason, can influence their assessments of the arrangement as needed and fair. Similarly, co-workers' own perceptions of employee performance, that may differ to the evaluations of the LM or even other colleagues, are the basis of their assessments of financial i-deals as fair and equitable. In fact, the research suggests co-workers may perceive the very nature of the resources on offer via i-deals differently to their employers, influencing their fairness assessment of the arrangement. Finally, subordinate perceptions of feeling supported to carry out their role and their own access to flexible working options are shown to act upon their judgements of LM flexibility i-deals, and the challenges faced by LMs in managing the needs of the relevant parties to their i-deals are highlighted. Both of these perspectives were previously overlooked by i-deals research.

### *12.2.c. Practical implications of the research*

Overall, the research encourages the broad use of flexibility i-deals that are supportive of employees in nature and have broad behavioural benefits to organisations. LMs should feel empowered to grant these i-deals and HR representatives are encouraged to advocate for their creation. Employees are encouraged to initiate conversations with their employer regarding the individualisation of their employment terms in support of their needs, through flexibility i-deals. To increase the acceptance of flexibility i-deals by co-workers, LMs and HR representatives should



make use of the cultural levers available to them to promote shared understandings that these arrangements are considered to be needed and fair in the widest of circumstances. Plus, employees are encouraged to consider the benefits of proactive and open communication with co-workers around the nature of their i-deal. Co-worker acceptance of a flexibility i-deal may be supported by employees (or LMs) explaining why the i-deal was requested, especially if framed to emphasise employee need for the arrangement by highlighting how it supports conflicts between their work and personal life.

When flexibility i-deals are granted to individuals with line management responsibilities, additional considerations need to be made so that subordinates can access support when that LM is not physically present. The burden of managing the potential impact of the i-deal should not fall entirely on the LM, as this risks negative outcomes for them and the organisation through work-spillover. LMs and senior managers are instead encouraged to proactively consider and plan, with all the relevant parties to the arrangement, how the i-deal should be managed. LMs are warned against strategies for managing the impacts of their flexibility i-deal that involve restricting the flexible working options for their subordinates. These can be particularly detrimental to subordinate attitudes and experiences.

In contrast, the research promotes caution around the use of financial i-deals. The potential for LMs to use these i-deals for recruitment or retention should be weighed up against the possible limits and risks of these arrangements. Market-based in nature, financial i-deals are likely insufficient to build quality relationships with high performing employees or to be accompanied by positive employee attitudes. Plus, using financial i-deals as a method of retaining employees in place of a competitive, market-based compensation scheme appears likely to lead to the creation of i-deals perceived as unfair by third parties. Consequently, employers considering financial i-deal requests should question whether these initially attractive arrangements with seemingly mutual benefits, are truly mutually beneficial given the risk of unintended consequences. HR should consider taking on a gatekeeper role in granting these arrangements whereby they can act to discourage the creation of financial i-deals except for truly the highest performing employees.

#### *12.2.d. An agenda and implications for future research*

Opportunities for future research have been highlighted throughout the discussions of the study's findings. Nevertheless, as an exploratory, qualitative project that has worked to broaden and deepen our thinking related to i-deals, the study has some overarching implications for future research that should be emphasised.

Foremost, the study and its findings emphasise that multisource research, and exploring i-deals from the perspectives of the multiple relevant stakeholders to these arrangements, must continue and be made a priority moving forward. Such research should take into account the increasing number of stakeholders that have emerged from this research as potentially relevant to and affected by i-deals (e.g., HR, senior managers, other LMs). As demonstrated in section 12.2.b, the experiences and perceptions of all of the relevant parties to i-deals are key to the formation and functioning of these arrangements. Acknowledgement of the benefits of multi-stakeholder research into i-deals cannot continue to be confined to the limitations section of research papers, but rather inform an agenda for i-deals research moving forward if these arrangements are truly to be holistically understood and be valuable for practitioners. Both qualitative and quantitative research of this nature is valuable. Exploratory research exploring experiences of developmental and task i-deals, that were not the focus of this research, can provide further insights into the formation and functioning of i-deals within organisations. Many of the findings and questions raised by this project are potentially relevant to developmental and task i-deals. What are employers' motivations and conditions for granting developmental and task i-deals? Do employee perceptions of those motivations and conditions influence their responses (as this research evidences for flexibility and financial i-deals)? What do co-workers believe constitutes a fair developmental or task i-deal, what criteria do they use to assess the fairness of these arrangements, and what influences and information inform those assessments? Equally, this study also acts a springboard for quantitative studies to specifically test the models and pathways that have been theorised as a result of the exploratory methods adopted here.

This research highlights the need for investigations moving forward to distinguish between i-deals held by those with and without line management responsibilities, and to further examine the differences in the formation and functioning between these two categories of i-deal. For example, it would be valuable for further research to explore differences in the way third parties assess the fairness of i-deals held by those with and without line management duties, taking into account the nature of relationship between the parties (e.g., power dynamics, functional dependence and hierarchical differences). Given the lack of empirical attention (beyond this study) given to understanding experiences of LM flexibility i-deals, these arrangements continue to warrant further exploration. This research highlights the challenges faced by LMs with flexibility i-deals when attempting to reduce the impacts of their i-deals on relevant third parties. Future research focused on how LMs with flexibility i-deals can manage the demands of their multiple stakeholders would be beneficial for improving LM access to flexibility i-deals (overcoming beliefs

that LMs can't or shouldn't work flexibly), and for reducing risks of role overload and work-spillover for LMs who do work flexibly.

The research has taken a step in expanding our limited understanding of denied i-deal requests: why managers might deny i-deals and highlighting scenarios where co-workers may consider the denial of i-deal requests unfair. Yet, our knowledge of the consequences of denied i-deal requests remains limited. For example, based on the findings of this research, the consequences for the employment relationship of denying supportive, ex-post flexibility i-deals warrants further exploration (see section 7.2). Plus, procedural justice is a potentially informative theoretical lens through which to examine co-worker responses to denied i-deals (see section 9.6).

Given the established importance of third-party perceptions to the successful functioning of i-deals (Rousseau et al. 2006; Lai et al. 2009; Rousseau et al. 2016), future research should build upon the findings of this study to consider how organisations can encourage co-worker acceptance of flexibility i-deals in the broadest of circumstances. As determined by this study, supportive flexibility i-deals can have behavioural benefits and can be distributed widely rather than exclusively. Existing research suggests this broad distribution will support co-worker acceptance of i-deals (Rousseau et al. 2016), but this study also reveals co-worker concern with whether flexibility i-deals are needed based on shared understandings (or shared experiences). Here, organisations have been encouraged to use cultural levers (see section 9.5 and section 12.2.c) to build shared understandings that a wide variety of reasons for creating flexibility i-deals are acceptable. However, further research focused specifically on how this outcome can be achieved would be highly beneficial for organisations wishing to gain the most benefits out of broadly distributed flexibility i-deals. Based on the findings of this study, greater understanding is needed of how co-worker attitudes and responses to i-deals (both to specific arrangements and the creation of i-deals generally) changes over time. This research highlights co-workers becoming more open to the creation of certain types of i-deal with increased exposure to these arrangements, but the mechanism(s) acting upon this change remains unknown and warrants consideration. Again, further understanding of this change may support the provision of recommendations to employers for encouraging co-worker acceptance of flexibility i-deals created in response to a more diverse range of needs. Additionally, the potential for co-workers' increased acceptance of any financial i-deals negotiated ex-ante to fade over time (see section 9.3.c) would have important implications for organisations considering the use of such arrangements and should be also examined.

It has been noted (see section 7.7) that a small amount of data collected by the study revealed multifaceted i-deals that had been negotiated: i-deals offering financial *and* flexibility (as well as other) dimensions. This was presented as a limitation of the study and future research is called upon to explore the potential for multifaceted i-deals as a potential route to organisations reaping relational and functional benefits. Multifaceted i-deals also require further exploration more generally. One of the established defining characteristics of i-deals suggests these arrangements can vary in scope and may incorporate multiple elements (see section 2.1), yet most studies (this research included) explore i-deals pertaining to individual dimensions (Conway and Coyle-Shapiro 2016). The existence of multifaceted i-deals raises questions that have not yet been explored. Do employees, employers and third parties consider and negotiate these arrangements as one i-deal with multiple components, or view them as separate deals? How do co-workers assess the fairness of multifaceted i-deals if they are considered one overarching arrangement, or is the fairness of each element judged in its own right? Future research should explore the frequency of multifaceted versus single dimension i-deals, and how different i-deal stakeholders perceive and respond to these multifaceted arrangements.

Finally, the data collection for this research was completed only shortly before nations all over the world responded to what became the COVID-19 global pandemic. ‘Lockdowns’ across the world, including the UK, have led to widespread home-working and to the flexing of working hours to accommodate other responsibilities. Between half and two-thirds of workers in the UK are estimated to have worked at home at some point during lockdown (Working Families 2020). The sudden and substantive shifts in where and when employees work will inevitably have had an impact on attitudes and experiences of flexibility i-deals in particular: a change that this research does not capture. This thesis promotes the broad use of supportive flexibility i-deals and sets out recommendations for increasing acceptance of these arrangements by third parties. With this recommendation in mind, it is hoped that widespread homeworking and flexible working will have started to breakdown some of the barriers to the wider use of flexible working that this research identified. These include ingrained beliefs that LMs should not and cannot work flexibly, and that flexibility is needed and fair in some scenarios but not others. The impact of national lockdowns on these attitudes is undoubtedly an important topic for future research to explore. Nevertheless, the experience of such widespread homeworking has not necessarily supported the development of strategies to manage flexibility, and requests for flexibility i-deals, when homeworking is not enforced. Nor for scenarios when some workers have a desire to return to the workplace but others to keep working flexibly or at a distance. Thus, especially given that requests for flexible working are now anticipated to rise (CIPD 2020), the understanding gained by

this research is of increased importance as nations come out of lockdown and individual LMs are once again faced with the choice to grant or deny flexibility i-deal requests.

### *12.3. Final reflections*

I-deals are attractive to employers and research into these arrangements reflects questioning as to whether the standardisation of employment terms is always the route to optimal outcomes. Understanding the formation and functioning of i-deals from the perspectives of multiple interested parties is highly relevant to contemporary organisations and individuals. Through a qualitative and multi-stakeholder approach, this research has made numerous contributions to the i-deals literature. Insight has been provided into employer motivations and conditions for granting flexibility and financial i-deals, as well as to how these correspond to employee responses, which combined have informed the proposition of two theoretical pathways to i-deal outcomes. Understanding of why and how co-workers assess the fairness of flexibility and financial i-deals has also been enhanced, and LMs have been explored as the recipients (not just authorisers) of flexibility i-deals with implications highlighted for other employees. Based on the research findings, practical recommendations have been made to support the creation of supportive flexibility i-deals that have benefits for employees and employers, and will be assessed as fair by co-workers. Plus, additional considerations are highlighted to encourage the successful functioning of flexibility i-deals held by LMs. In contrast, this research manages expectations regarding the benefits of financial i-deals, as these arrangements can have limited, functional outcomes while also risking negative responses from co-workers when used as a substitute for a market-based compensation scheme.

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## Appendix 1. Breakdown of samples

<i>InsuranceCo</i>									
Respondent pseudonym	Gender identity	Tenure (at organisation, years)	Nature of interview	Duration of interview (mins)	EE	LM	HR	Co-worker only	Subordinate to LM with i-deal
Alexis	F	8	Face to face	52		X	X		
Amelia	F	2	Face to face	53					X
Angie	F	7	Face to face	46		X			
Archie	M	2	Face to face	46				X	
Cassie	F	1.5	Face to face	47					X
Cerys	F	2.5	Face to face	44					X
Christian	M	2	Face to face	44	X				X
Daisy	F	2	Face to face	44					X
Deborah	F	11	Face to face	42	X				
Elizabeth	F	0.75	Face to face	37					X
Emma	F	8	Face to face	54	X	X			
Fran	F	4	Face to face	36	X				
Georgina	F	18	Face to face	44	X				X
Helen	F	0.75	Face to face	32	X				X
Jacob	M	8	Telephone	48		X	X		
James	M	1.5	Face to face	44				X	
Jennifer	F	5	Face to face	33	X		X		
Karen	F	5.5	Face to face	51				X	
Kim	F	6.5	Face to face	53	X				
Lucy	F	4.5	Telephone	55	X				
Lynne	F	13	Face to face	52	X	X			
Malcolm	M	3	Face to face	54			X		X
Marcus	M	11.5	Face to face	29	X		X		
Megan	F	3.5	Face to face	51				X	

Michelle	F	9	Telephone	63	X				
Mo	M	4	Face to face	53					X
Oliver	M	3	Face to face	53	X	X			X
Phillip	M	2	Face to face	32	X	X			
Polly	F	6	Face to face	37	X				X
Rachel	F	5	Face to face	47	X	X			
Rebecca	F	3.5	Face to face	40	X				
Richard	M	17	Telephone	60		X			
Rob	M	3	Face to face	51					X
Sean	M	3	Face to face	47				X	
Seb	M	3	Face to face	39					X
Simon	M	3	Face to face	51	X				
Sophie	F	0.5	Face to face	48		X	X		
Stephanie	F	0.75	Telephone	62				X	
Tamsyn	F	6	Face to face	44	X	X			
Tim	M	7	Face to face	51	X	X			
Tony	M	6	Telephone	45	X				
Will	M	3	Face to face	63	X				X
<b>Totals</b>	<b>F = 25, M = 17</b>			<b>47.07</b>	<b>22</b>	<b>12</b>	<b>6</b>	<b>6</b>	<b>15</b>


<i>ConstructionCo</i>									
Respondent pseudonym	Gender identity	Tenure (at organisation, years)	Nature of interview	Duration of interview (mins)	EE	LM	HR	Co-worker only	Subordinate to LM with i-deal
Ben	M	6	Face to face	51	X	X			
Charlie	F	3	Face to face	54	X				
Erik	M	2.5	Face to face	26				X	X
Ewan	M	21	Face to face	48				X	
Graham	M	4	Face to face	38	X	X			
Gregory	M	12	Face to face	56	X	X			X
Jess	F	22	Face to face	51			X		
Laurie	F	1.5	Face to face	47	X				X
Liv	F	2.5	Face to face	47	X	X			
Matthew	M	1	Face to face	47	X				
Paul	M	2	Face to face	42	X	X			
Peter	M	4.5	Face to face	102		X	X		X
Samuel	M	0.75	Face to face	61	X				
Tom	M	6	Face to face	24				X	
Verity	F	0.5	Face to face	61			X		
	<b>F = 5, M = 10</b>			<b>50.33</b>	<b>9</b>	<b>6</b>	<b>3</b>	<b>3</b>	<b>4</b>

## Appendix 2. Research advert



CARDIFF  
UNIVERSITY  
PRIFYSGOL  
CAERDYDD

# Research volunteers needed



E·S·R·C  
ECONOMIC  
& SOCIAL  
RESEARCH  
COUNCIL

Volunteers are invited to participate in a research study exploring experiences of, and attitudes towards, personalised employment arrangements in the workplace.

These personalised arrangements can come in many different forms, but tend to occur when people have negotiated special terms of employment to suit their personal circumstances. Examples could include: flexible working arrangements, career breaks, providing financial support for qualifications, tailoring the duties of a specific person's job, and individualised reward and benefits packages.

Volunteering for the study would involve taking part in a confidential research interview, during work time, lasting approximately 1 hour.

*Eligibility criteria*

I am interested in talking to the following people:

- employees who have a personalised employment arrangement,
- managers of an employee with a personalised employment arrangement,
- people who work with employees who have a personalised employment arrangement.

If you are interested in being involved, please contact Catherine Mackintosh for more details ([mackintosh@cardiff.ac.uk](mailto:mackintosh@cardiff.ac.uk)).

The research is being conducted by Catherine Mackintosh as a requirement of her doctoral studies at Cardiff Business School, Cardiff University.

# Appendix 3. Employee (inc. line managers with i-deals) interview schedule

## Interview schedule – employee/LM in receipt of i-deal

Welcome. Introduce self. Explain the purpose of the research. Ensure anonymity.

### 1. *Introduction/biographical data*

- 1.1. What is your job role, and what does this involve?
- 1.2. How long have you done this job?

### 2. *Idiosyncratic deals – the basics*

Explain what an idiosyncratic deal is: provide definition and give examples.

- 2.1. Do you believe you have an arrangement such as this?

**(IF NO: GO TO SECTION 9)**

- 2.1.1. Can you describe the arrangement for me?

- 2.2. Why did you want this arrangement?  
*(Motivation? To solve a specific problem? Felt like you deserved it? Reward your performance/contribution? Other?)*

- 2.3. Do you think any existing organisational policies or procedures could have fulfilled the requirements/wishes that led to the arrangement?  
*(Why/why not? Which policies could have been relevant? Why were they not sufficient? Were procedures/policies a part of the process e.g., flexible working?)*

- 2.3.1. Did you check or discuss this?  
*(If no: why not?)*

### 3. *The i-deal negotiation process*

- 3.1. Did you initiate the arrangement?  
*(Did you request or were you approached?)*
- 3.2. When was the arrangement made?  
*(How long ago? Before you started the job/or how long into the job?)*
- 3.3. With whom did you make the arrangement?  
*(Manager? HR?)*

3.3.1. Was anyone else involved?  
(HR? Co-workers? What was their involvement?)

3.4. Can you describe the negotiation process?  
(Was your proposal accepted fully? Did they make alternative proposals? Did any bargaining take place? Were the outcomes of the arrangement discussed? Benefits to you discussed? Benefits to the organisation discussed?)

3.5. Why do you think your manager/employer agreed to the arrangement?  
(To help you? To reward/retain/recruit you? To benefit organisation?)

3.5.1. What other factors do you believe influenced your manager's/employer's decision?  
(Your relationship with manager? Personality/characteristics of manager? Your skills/contribution to the organisation? Your own personality/characteristics? Values of the organisation?)

3.6. Was the arrangement formalised?  
(How? In writing? Did you want it to be formalised? Did employer/manager want it to be formalised? Did this involve informing HR? Are HR aware of the arrangement?)

3.7. Were any terms or conditions placed upon agreeing to the arrangement?  
(Trial period? Time limited? Subject to review? Performance expectations? Delayed start e.g., after probation? Acceptance of colleagues? Were ways of assessing success defined?)

3.8. Do you think the process of negotiating your arrangement was fair?  
(Why/why not?)

3.8.1. What generally would make a process for considering arrangements such as this fair? What would make it unfair?  
(Representation of all affected? Unbiased? Consistent application? Accurate information being used? Able to correct mistake? Moral? Trust? Neutrality? Social standing?)

3.8.2. Did it matter to you whether the process was fair or not?  
(Why/why not? Impact on how the arrangement perceived by others? More/only concerned about the outcome?)

#### **4. Outcomes of the i-deal**

4.1. What are the benefits of the arrangement?  
(Short-term benefits? Long-term benefits? Changed over time?)

4.2. Are there any downsides?

4.3. When the arrangement was first agreed, how did you feel?  
(Surprised or was it expected? Grateful for or entitled to arrangement? Valued? Appreciated?)

4.3.1. Do you still feel that way?  
(Why/why not? If no: how long did that last?)

4.4. When the arrangement was first agreed, did your behaviour at work change in any way?  
(How? Why/why not? Changes over time?)

4.5. Has the arrangement itself changed over time?  
*(If yes: how? Why? Was the change formal or informal?)*

4.6. Overall, would you say the arrangement is fair?  
*(Why/why not? For who? For you? For co-workers? For the employer?)*

4.6.1. What generally makes such an arrangement fair? What makes it unfair?  
*(Why? Fair to who? To you? To co-workers? To employer? Based on contribution, equality, need?)*

**5. *Your manager/employer and the i-deal***

5.1. How do you think your manager feels generally towards the arrangement?  
*(Would they describe it as a success? Why/why not?)*

5.1.1. Do you think your manager thinks the arrangement is fair?  
*(Why/why not? Fair to who? Fair to you? Fair to them? Fair to co-workers? Is this important to you?)*

5.2. Has your relationship with your manager been affected in anyway as a result of the arrangement?  
*(Attitude changes towards you? Your contribution? Your work? Why/why not?)*

5.2.1. Has the arrangement impacted upon your attitude or feelings towards your manager?  
*(Any positive influence? Any negative impact? Has this changed over time?)*

5.3. Has the arrangement impacted upon your attitude or feelings towards your employer?  
*(Any positive influence? Any negative impact?)*

5.3.1. Do you think this has changed in any way over time?  
*(How? When?)*

**6. *Co-workers and i-deals: communication***

6.1. Are your co-workers aware of your arrangement?  
*(All? Some?)*

6.1.1. What exactly do they know?  
*(Details of the arrangement? Why it was requested? Why it was granted? Any details missed out? Why/why not?)*

6.1.2. When did they find out about it?  
*(When the request was first made? Once agreed? Once in place? Later on?)*

6.1.3. How did they find out?  
*(Who from? Found out formally or informally? One on one? In a group? In a meeting? Over email?)*

6.1.4. Was the way your arrangement was communicated to others important to you?  
(*Why/why not? Care about others reactions? Any of their business? Did you want others to know?*)

6.1.5. Do you think the way that it was communicated was fair/appropriate?  
(*Why/why not?*)

*OR (if co-workers not aware)*

6.2. Why don't your co-workers know about your arrangement?  
(*Your choice? Manager's choice?*)

6.2.1. Do you think it's fair that your co-workers don't currently know about the arrangement?  
(*Why/why not?*)

6.2.2. Do you think they will find out?  
(*Why/why not? If yes: how?*)

## **7. Co-workers and i-deals: impact of the arrangement**

7.1. When you made the arrangement, did you consider whether your colleagues' work might be impacted?

7.1.1. Did this matter to you?  
(*Why/why not?*)

7.1.2. Has your arrangement impacted on your colleagues' work in any way?  
(*Duties? Schedule? Workload?*)

7.2. When you first made the arrangement, were you concerned about how your co-workers would react?  
(*Why/why not?*)

7.2.1. Are you concerned about your co-workers' feelings towards the arrangement now?  
(*Why/why not?*)

7.3. Do you believe your relationships with your co-workers have been impacted in anyway as a result of the arrangement?  
(*Why? How?*)

7.4. How do you think your co-workers feel generally towards the arrangement?  
(*Supportive? Accepting? Jealous?*)

7.4.1. Do you think your co-workers view the arrangement as fair?  
(*Why/why not? Is this important to you?*)

## **8. Line manager questions (managers with i-deals)**

8.1. Do you have line management responsibility as part of your role?



- 8.2. Does your arrangement impact on your line management duties in any way?  
*(Impact on support of employees? Have you needed to take any action to ensure that support? Would they know where to go if they can't get hold of you?)*
- 8.3. Does your arrangement impact on your reports in any way?  
*(Increase their flexibility? More open to their own arrangements? Decrease their flexibility?)*
- 8.4. When you made the arrangement did you think about your line management duties or how it would affect your reports?  
*(Was that important to you? Is it now?)*
- 8.5. How did you communicate the arrangement to your reports? Did they have any say?
- 8.6. Do you check in with them about how the arrangement is working out? How?
- 8.7. Do your peers (other managers) ever get involved in the management of your reports if you aren't around?
- 8.8. Have you had any new starters join your team since you've had the arrangement?
- 8.9. If yes: Did the arrangement have any impact on building that relationship? Did you need to adapt in order to provide them with support?

9. **Denied i-deals**

- 9.1. Have you ever made a request for an arrangement like this that was refused?
- 9.2. If yes: What was the arrangement you were requesting?
- 9.3. Who made the decision to refuse it?  
*(Manager? HR? Senior management? Anyone else involved?)*
- 9.4. What happened?  
*(Was there a process? Formal or informal? Part of an agreed review? Was this process fair? How was the decision communicated to you? Was this communication sufficient?)*
- 9.5. Why was it refused?  
*(Was this fully explained to you? Do you agree with the reasoning?)*
- 9.6. How did you feel when the request was refused?  
*(Feelings towards manager? Feelings towards employer? Did this affect your relationships? Why/why not?)*
- 9.6.1. Do you think this affected your behaviour at work in any way?
- 9.6.2. Have these feelings or behaviours changed over time?  
*(Why/why not? How long after?)*
- 9.7. Overall, do you think the decision to refuse the arrangement was fair?  
*(Why/why not?)*

**10. General attitudes towards i-deals**

10.1. Do you think arrangements such as these should be available to all employees?  
(Why/why not?)

10.2. If no: Who should they be available to?  
(Star performers? Employees struggling with performance? Employees struggling with work-life balance? In what circumstances? Recruitment tool? Retention tool? Motivate or reward performance? What concerns do you have about arrangements like this?)

10.3. Generally, what do you think makes these arrangements work well?  
(Certain types of arrangement? Under what circumstances/conditions? Co-worker acceptance? Does communication matter? Does timing matter: during recruitment? Existing employee? Threatening to quit?)

10.4. When do they not work well?  
(What makes problematic? Contents? Under what circumstances/conditions? Does timing matter: during recruitment? Existing employee? Threatening to quit?)

Finally, is there anything else about your arrangement, or such arrangements generally, that you would like to discuss, or that you think I've missed?

# Appendix 4. Co-worker/subordinate interview schedule

## Interview schedule - co-worker/subordinate (third party to i-deal)

Welcome. Introduce self. Explain the purpose of the research.  
Ensure anonymity

### 1. *Introduction/biographical data*

- 1.1. What is your job role, and what does this involve?
- 1.2. How long have you done this job?

### 2. *Co-workers with i-deals: the basics*

Explain what an idiosyncratic deal is: provide definition and give examples.

- 2.1. Are you aware of any of your colleagues having such an arrangement?
  - 2.1.1. If yes: Can you describe the arrangement?  
(Content?)

### 3. *Co-worker i-deal: background and motivations*

- 3.1. Why do you think this colleague wanted the arrangement?
  - 3.1.1. Was this communicated to you?  
(How? Who by?)
  - 3.1.2. Does the reason why your colleague wanted the arrangement matter to you?  
(Why/why not?)
  - 3.1.3. Does it affect how you feel about the arrangement?  
(Why/why not? What affect?)
  - 3.1.4. Does it affect how you feel about your colleague?  
(Why/why not? What affect?)
- 3.2. Why do you think your employer agreed to the arrangement?  
(Reward? Motivation? Retain/recruit? Open to flexibility?)
  - 3.2.1. Was a reason for it being granted communicated to you?  
(How? Who by?)
  - 3.2.2. Does the reason your employer agreed to it matter to you?  
(Why/why not?)

3.2.3. Does the reason they granted it affect how you feel about the arrangement generally?  
*(Why/why not? What affect?)*

3.2.4. Does it affect how you feel about your employer?  
*(How? Perception of manager? Perception of HR? Perception of employer generally? Why/why not?)*

3.3. Do you think any other factors influenced the arrangement being formed?  
*(Personality or leadership style of the manager? Personality of the employee? Manager opinion of employee? Favouritism? Concerns about employee leaving? Relationship between employee and manager?)*

3.4. Do you think any existing organisational policies or procedures could have been used instead of your colleague and your employer making the arrangement?  
*(Why/why not? Which policies could have been relevant? Why do you think they weren't used?)*

#### 4. **Co-worker i-deal: the process**

4.1. Do you know how the arrangement first came about?  
*(Employee requested it? Negotiation? Aware of any of the negotiation details? Know who was involved?)*

4.2. Do you know when it was agreed?  
*(How long ago? Already employee or during recruitment?)*

4.2.1. If ex-ante: Did it matter to you that they were a new recruit?  
*(Feel more or less accepting than if existing employee? Understand employer motivated to recruit? Unhappy that new employee being given preferential treatment? More or less acceptable to be making exceptions to policy? Why/why not?)*

4.2.2. If ex-post: Did it matter to you that they were an existing employee?  
*(Feel more or less accepting than if new recruit? Fairer because employer knows more about their skills and contributions? Unfair because other employees don't have same deal? More or less acceptable to be making exceptions to policy? Why/why not?)*

4.3. From what you know of it, would you say that process that led to your colleague's arrangement was fair?  
*(Why/why not? Does this matter to you?)*

4.4. What, generally, would make a process for considering arrangements such as this fair? What would make it unfair?  
*(Representation of all affected? Unbiased? Consistent application? Accurate information being used? Able to correct mistake? Moral? Trust? Neutrality? Social standing?)*

4.5. When did you become aware of the arrangement?  
*(Aware during negotiation? Before? Once implemented?)*

4.5.1. How did you find out about it?  
(Formally communicated? Informal? Who told you?)

4.5.2. Do you think the way the arrangement was communicated to you was fair/appropriate?  
(Why/why not? Given enough information? Sufficient justification? Communicated respectfully? Trust the information given? Does this matter to you?)

5. **Co-worker i-deal: outcomes and impact on you**

5.1. Can you describe your working relationship with the colleague who has the arrangement?  
(Are they in the same team as you? Do you have the same manager? Do you work closely with them? Does your work overlap?)

5.1.1. Does their arrangement impact on your work, or your ability to complete your work in any way?  
(Schedule? Workload? Duties? Has this changed over time?)

5.2. Has your colleague's arrangement led to any positive benefits for you?  
(Short-term? Long-term?)

5.2.1. Have these benefits changed over time?  
(Different benefits? Increased or subsided? When change?)

5.3. Has your colleague's arrangement led to any negative consequences for you?  
(Short-term? Long-term?)

5.3.1. Have these changed over time?  
(Different benefits? Increased or subsided? When change?)

5.4. Overall, would you say the arrangement is fair?  
(Why/why not? For who? you? employee? employer? manager?)

5.4.1. What generally makes such an arrangement fair? What makes it unfair?  
(Why? Content? Motivation? Based on contribution/equity, equality or need?)

6. **Denied i-deals**

6.1. Are you aware of any requests for individualised arrangements, made by your colleagues, being denied?

6.1.1. Do you know what the request was?  
(Describe)

6.1.2. Do you know why it was denied?

6.1.3. How did you find out about it?  
(From employee? Manager? Formally or informally? Do you think colleagues should be aware when this happens?)

6.1.4. From what you know, do you agree with the decision to refuse the arrangement?

6.1.5. Do you think it was fair that the arrangement was refused?  
*(Why/why not? Fair to who: employee? you? other colleagues? manager? wider employer?)*

6.1.6. Has finding out about this denied request affected how you feel about your manager?  
*(Why/why not? Other employer representatives? HR?)*

**7. Subordinate questions (employee of manager with i-deals)**

7.1. Does your manager have an arrangement like that? What does it involve?

7.2. Does it have any impact on your ability to complete your work?

7.3. Does it have any impact on their support of you?

7.4. Do you know where to go for support if your manager isn't around?  
*(Does this ever happen? What do you do?)*

7.5. Does it impact on your relationship with your manager in any way?

7.6. Does it or has it had an impact on anyone else in the team?

7.7. When did the arrangement start (before or after you joined team?)

7.8. How was it communicated to you?

7.9. Were you involved in the arrangement being made?  
*(Did anyone ask for your thoughts? Was support of you taken into account?)*

7.10. Does the arrangement lead to any benefits for you?  
*(More open to an arrangement for you?)*

7.11. Does the arrangement lead to any downsides for you?  
*(Reduced flexibility for you?)*

7.12. Do you think the arrangement is fair?

**8. General attitudes towards i-deals**

8.1. Do you think arrangements such as these should be available to all employees?  
*(Why/why not?)*

8.2. If no: Who should they be available to?  
*(Star performers? Employees struggling with performance? Employees struggling with work-life balance? In what circumstances? Recruitment tool? Retention tool? Motivate or reward performance? What concerns do you have about arrangements like this?)*

8.3. Generally, what do you think makes these arrangements work well?  
*(Certain types of arrangement? Under what circumstances/conditions? Co-worker acceptance? Does communication matter? Does timing matter: during recruitment? Existing employee? Threatening to quit?)*

8.4. When do they not work well?  
*(What makes problematic? Contents? Under what circumstances/conditions? Does timing matter: during recruitment? Existing employee? Threatening to quit?)*

Finally, is there anything else about your colleague's arrangement, or such arrangements generally, that you would like to discuss, or that you think I've missed?

# Appendix 5. Line manager interview schedule

## Interview schedule – line manager (granter of i-deals)

Welcome. Introduce self. Explain the purpose of the research.  
Ensure anonymity

### 1. *Introduction/biographical data*

- 1.1. Can you describe the department you work in and what it does?
- 1.2. What is your job role, and what does this involve?
- 1.3. How long have you done this job?

### 2. *Subordinate idiosyncratic deals – the basics*

Explain what an idiosyncratic deal is: provide definition and give examples.

- 2.1. Do you believe anybody in your team has such an arrangement?
  - 2.1.1. If yes: Can you describe this arrangement for me?

### 3. *Subordinate i-deals: the process and reasons for granting*

- 3.1. Were you involved in the discussions or negotiations leading to the arrangement?  
**(IF NO: GO TO SECTION 6)**
- 3.2. When was the arrangement first discussed?  
*(How long ago? Already employee or prior to recruitment?)*
- 3.3. If ex-ante: Did it make a difference that they were a new recruit?  
*(Motivated to recruit? More or less likely to accept than established employee? More or less likely to be open to negotiation? More or less open to making exceptions to policy? Why/why not?)*
- 3.4. If ex-post: Did it make a difference that they were an existing employee?  
*(Know more about their skills and contributions? More or less likely to accept than new recruit? More or less likely to be open to negotiation? More or less open to making exceptions to policy? Why/why not?)*
- 3.5. If ex-post: did the employee threaten to leave if the arrangement wasn't agreed to?
  - 3.5.1. If yes: Did this impact your decision making?  
*(More or less likely? Why/why not? Motivated to retain? Worried about perceptions of others? Employee difficult to manage?)*



3.6. Describe the process or discussions that led to the arrangement being agreed.  
*(Did employee initially request it? Negotiation? What details were discussed?)*  
*(Why/why not?)*

3.6.1. Were HR involved in discussions leading to the arrangement?  
*(What was their involvement? Simply to advise or actively part of the discussion? Advise on process and/or outcome? What was their attitude towards the request and the arrangement? Generally in favour or against?)*

3.6.2. Were co-workers involved in anyway?  
*(Did you get their opinions or agreement?)*

3.7. Was the arrangement formalised in any way?  
*(Confirmed verbally or in writing? A formal contractual change?)*

3.8. Would you describe the process that led to the employee's arrangement as fair?  
*(Why/why not? Fair to who: you? employee? co-workers? organisation as a whole?)*

3.8.1. At the time, was it important to you that the process leading to the arrangement was fair?  
*(Why/why not?)*

3.8.2. What, generally, would make a process for considering arrangements such as this fair? What would make it unfair?  
*(Representation of all affected? Unbiased? Consistent application? Accurate information being used? Able to correct mistake? Moral? Trust? Neutrality? Social standing?)*

3.9. Overall, why did you agree to the arrangement?  
*(Motivate? Reward performance? Retain? Recruit? Wanting to offer flexibility?)*

3.10. What factors did you consider before agreeing to the arrangement?  
*(Details/content? Feasibility?)*

3.11. Which of these did you feel were most important when making the decision?  
*(Why?)*

3.12. Why did the employee want the arrangement?  
*(Motivation? Why request it? Problem solving? Work-life balance? Reward contribution/performance? Trying to get most for themselves? Looking to leave?)*

3.12.1. When you were considering the request, was it important for you to understand why the employee wanted it?  
*(Why/why not? Did this influence your decision? What affect?)*

3.13. Did you consider the impact of the arrangement on the employee's co-workers?

3.13.1. What benefits did you expect these co-workers to experience?  
*(Highlight opportunities for them? Impact on work schedule/duties? Reduced opportunities for them? Short-term? Long-term? Change over time? Did these affect your decision?)*

3.14. Did you consider the perceptions of the employee's co-workers when considering the request? If yes, what specifically did you consider?  
*(Co-worker feelings? Favouritism? Fairness? Treating employees equally? Possibility of future requests? Precedent setting? Attitudes towards the employee? Did this affect your decision?)*

3.14.1. Did you expect these co-workers' behaviour to change at all?  
*(Increased/decreased effort or motivation? Treatment of the employee? Relationship with you? Did this affect your decision?)*

#### 4. **Communication of i-deals**

4.1. Are the employee's colleagues aware of the arrangement?

4.1.1. If no: Why not?  
*(Whose decision? Worried about co-worker reactions? Worried about more requests? Not their business/doesn't affect them? Not prepared to make same arrangement for others? Worried about perceptions of favouritism or unfairness?)*

4.2. When did they find out about the arrangement?  
*(When the request was first made? Once agreed? Once in place? Later on?)*

4.3. How did they find out about the arrangement?  
*(Who from? Found out formally or informally? One on one? In a group? In a meeting? Over email?)*

4.3.1. Did you want them to know?  
*(If yes, why? To be transparent? Thought they should know? Would find out anyway? Affects them?)*

4.4. Did how they would find out matter to you?  
*(Why/why not? Communicate sensitively? Worried about reaction? Did you want to keep it secret?)*

4.5. What were they told?  
*(Reason for granting? Reason arrangement was requested? Why?)*

4.6. Do you think the manner in which the arrangement was communicated was fair/appropriate?  
*(Why/why not? Given enough information? Sufficient justification? Communicated respectfully? Trustworthy information given? Does this matter to you?)*

#### 5. **The outcomes of i-deals**

Moving away from process, and what was considered at the time, to actual outcomes experienced by people within the organisation.

5.1. Describe the employee's attitude and behaviour following the arrangement being granted?  
*(Performance? Motivation? Productivity? Engagement? Relationship with you or co-workers? Any changes as a result of the arrangement? Change over time?)*

5.2. Do you think your relationship with the employee has changed in anyway as a result of the arrangement?

*(Improved/worsened? Why/why not?)*

5.3. If co-workers aware: From your perspective, how did the employee's co-workers react to the arrangement?

*(Attitudes? Behaviour? Has this changed over time?)*

5.3.1. Do you think their attitudes towards the arrangement have changed over time?

*(If so, how? When? How long after?)*

5.4. Do you think your relationship with any of these co-workers has changed as a result of the arrangement?

*(Improved/worsened? Why/why not?)*

5.5. Overall, would you say the arrangement is working as you'd hoped?

*(Why/why not? Do you regret making the arrangement? Would you make the same decision again?)*

5.6. Overall, would you say the arrangement is fair?

*(Why/why not? For who? you? employee? co-workers? organisation?)*

5.6.1. What generally makes such an arrangement fair? What makes it unfair?

*(Content? Motivation? Why? Based on contribution, equality or need?)*

## 6. **Denied i-deals**

6.1. Have you ever refused a request for an individualised arrangement?

6.1.1. If yes: What was the request?

6.2. Why did you refuse it?

*(Feasibility? Unfair to give special treatment? Outside of policy? Worried about co-worker reactions? Didn't think employee deserved it? Worried about setting precedents?)*

6.3. Do you think the decision to refuse the request was fair?

*(Why/why not? Fair to who? employee? co-workers? you? business?)*

6.4. Describe the process or discussions that took place while considering the request?

*(Formal or informal? Meeting? HR involved? Co-workers involved? Senior manager involved?)*

6.4.1. Do you think this process was fair?

*(Why/why not?)*

6.4.2. Were you worried about the fairness of the process?

*(More or less worried about process fairness because you were refusing the request?)*

6.5. How did you communicate the decision?

*(In person? In writing? Give reasons?)*

6.6. Do you think the way the decision was communicated was fair/appropriate?  
*(Why/why not? Given enough information? Sufficient justification? Communicated respectfully? Trustworthy information given? Does this matter to you?)*

6.7. Were you worried about the employee's reaction to you refusing the request?  
*(Why/why not?)*

6.7.1. Has the employees' attitude or behaviour at work changed following your refusal of this request?

6.7.2. Do you think your relationship with the employee has been affected at all?  
*(Why/why not?)*

## **7. General attitudes towards i-deals**

7.1. Do you think arrangements such as these should be available to all employees?  
*(Why/why not?)*

7.1.1. If no: Who should they be available be?  
*(Star performers? Employees struggling with performance? Employees struggling with work-life balance? In what circumstances? Recruitment tool? Retention tool? Motivate or reward performance? What concerns do you have about arrangements like this?)*

7.2. Generally, what do you think makes these arrangements work well?  
*(Certain types of arrangement? Under what circumstances/conditions? Co-worker acceptance? Does communication matter? Does timing matter: during recruitment? Existing employee? Threatening to quit?)*

7.2.1. When do they not work well?  
*(What makes problematic? Contents? Under what circumstances/conditions? Does timing matter: during recruitment? Existing employee? Threatening to quit?)*

7.3. Generally, how would you describe HR's role in considering and forming individualised arrangements?  
*(Involved or uninvolved? Aware or unaware? Supportive or barrier?)*

Finally, is there anything else about the employee's arrangement, or such arrangements generally, that you would like to discuss, or that you think I've missed?

# Appendix 6. HR interview schedule

## Interview schedule – HR

Welcome. Introduce self. Explain the purpose of the research.  
Ensure anonymity

### 1. *Introduction/biographical data*

- 1.1. What is your job role, and what does this involve?
- 1.2. How long have you done this job?

### 2. *Idiosyncratic deals – the basics and general attitudes*

Explain what an idiosyncratic deal is: provide definition and give examples.

- 2.1. Do such arrangements exist within your organisation?
  - 2.1.1. Can you give me some examples?

### 3. *I-deals where HR involved in negotiation*

- 3.1. Can you think of any such arrangements where you were involved in the initial negotiation process?

**(IF NO: GO TO SECTION 4)**

- 3.2. What was the arrangement that was being requested?  
*(What was the arrangement that was put forward? What job did the employee do?)*
- 3.3. When was the arrangement first discussed?  
*(How long ago? Already employee or prior to recruitment?)*
- 3.4. If ex-ante: Did it matter that the individual was a new recruit?  
*(Motivated to recruit? More or less likely to accept than existing employee? More or less likely to be open to negotiation? More or less open to making exceptions to policy? Why/why not?)*
- 3.5. If ex-post: Did it matter that the individual was an existing employee?  
*(Know more about their skills and contributions? More or less likely to accept than new recruit? More or less likely to be open to negotiation? More or less open to making exceptions to policy? Why/why not?)*
- 3.6. If ex-post: Did the employee threaten to leave if the arrangement wasn't agreed to?
  - 3.6.1. If yes: Did this impact your decision?  
*(More or less likely? Why/why not? Motivated to retain? Worried about perceptions of others? Employee difficult to manage?)*

3.7. Can you talk me through the negotiation process that led to the arrangement, describing your involvement?  
*(Were you involved in the decision? Did you advise? Were your thoughts properly considered? Were there formal meetings?)*

3.7.1. Who else was involved?  
*(Manager? Co-workers? Opportunity to give opinion?)*

3.7.2. Do you believe the process that led to the arrangement was fair?  
*(Why/why not?)*

3.7.3. At the time, was it important that the process leading to the arrangement was fair?  
*(Why/why not? As perceived by who? you? employee? co-workers? HR?)*

3.7.4. What generally would make the process for considering arrangements like this fair? What would make it unfair?  
*(Representation of all affected? Unbiased? consistent application? Accurate information being used? Able to correct mistake? Moral? Trust? Neutrality? Social standing?)*

3.8. Why did the employee want to make the arrangement?

3.8.1. Did their reason for wanting the arrangement matter to you?  
*(Why/why not? Did it impact on whether or not you thought the request should be accepted?)*

3.9. Why was the arrangement granted?  
*(Who made the decision? What reasons did they give?)*

3.9.1. Did any other factors influence the arrangement being formed?  
*(Personality or leadership style of the manager? Personality of the employee? Contribution of employee? Concerns about employee leaving? Relationship between employee and manager? Did the nature of the employee's job have any influence? Skilled versus unskilled? Autonomous versus dependant on others?)*

3.10. How did you feel about the request when it was first made?  
*(Reluctant or inclined to accept? Why?)*

3.10.1. Generally, what concerns, did you have?  
*(Treating people differently? Setting precedents? Difficult to manage/track? Wouldn't work for organisation? Didn't fit in with culture? Impact on customer or performance? Co-worker reaction? Employee becoming difficult to manage/make more requests? Other employees making requests?)*

3.10.2. What positives could you see?  
*(Positive impact on employee motivation and performance? Employer reputation – caring/flexible? Method of retention/recruitment?)*

3.11. Did you consider the outcomes of the arrangement for you, or the HR team?

3.11.1. When considering the arrangement, what benefits did you (or HR generally) expect to experience?  
*(Short-term? Long-term? Did these affect your attitude towards the arrangement?)*

3.11.2. What about downsides for you or the HR team?  
*(Short-term? Long-term? Did these affect your attitude towards the arrangement?)*

3.12. When the arrangement was negotiated, were any terms and conditions laid down?  
*(Counter suggestions? Trial period or subject to review? Time limited? Performance expectations? Delayed start to arrangement, e.g., on completion of probation? Acceptance of colleagues? Were ways of assessing the arrangement as successful defined?)*

3.13. Was the final arrangement that was agreed different in any way to the initial request?

3.13.1. If yes: What changed and why?

3.14. Once agreed, was the arrangement formalised in any way?  
*(In writing? Contractual change? Verbally agreed? Whose suggestion was this?)*

3.15. Did you consider whether making the arrangement was going against any pre-existing organisational policies?  
*(Pay? Reward? Flexible working? Learning and Development? Recruitment?)*

3.15.1. Do you think any existing organisational policies or procedures could have been used instead of forming the arrangement?  
*(Why/why not? Which policies could have been relevant? Why do you think they weren't used?)*

3.16. Overall, were you happy with the decision to agree to the arrangement?  
*(Why/why not?)*

3.17. Overall, do you think the arrangement is fair?  
*(Why/why not? For who? you? employee? co-workers? employer?)*

3.17.1. What, generally, makes such an arrangement fair? What makes it unfair?  
*(Content? Motivation? Why? Based on contribution, equality or need?)*

3.18. Have you been involved in considering any subsequent requests for individualised arrangements?

3.18.1. If yes: Has the arrangement affected your decision making around subsequent requests?

3.18.2. If no: How do you think this arrangement will affect your decision making regarding future requests?  
*(More or less likely to form future arrangements? Any changes? Include conditions? Trial periods?)*

4. **Outcomes of the i-deal**

4.1. Overall, would you say the arrangement has turned out as you had anticipated?  
(What, if anything, is different?)

4.2. What positives, if any, have resulted from the arrangement?  
(For the employee? For co-workers? For the manager? For you/HR? For the business?)

4.2.1. Have any of these changed over time?  
(Subsided? New positives developed? When did changes occur/after how long?)

4.3. What downsides, if any, have resulted from the arrangement?  
(For the employee? For co-workers? For the manager? For you/HR? For the business?)

4.3.1. Have these changed over time?  
(Subsided? New negatives developed as time passed? When did changes occur/after how long?)

4.4. Has the arrangement itself changed in any way over time?  
(How? Why? Was this discussed or happened naturally/informally? When did changes occur/after how long?)

4.5. Since the arrangement was formed, has the employee's manager changed?

4.5.1. Has this made a difference?  
(What was their reaction to the arrangement? Have they tried to review or change it? Did they come to you for advice? What did you advise?)

5. **Communication of the i-deal**

5.1. Are the employee's colleagues aware of the arrangement?

5.1.1. If yes: When did they find out about the arrangement?  
(When the request was first made? Once agreed? Once in place? Later on?)

5.1.2. How did they find out about the arrangement?  
(Who from? Found out formally or informally? One on one? In a group? In a meeting? Over email?)

5.2. Was the manner in which these colleagues found out important to you?  
(Why/why not? Worried about reaction? Did you, manager or employee want to keep it secret? Was the reason it was granted explained? What exactly was communicated?)

5.3. Do you think the manner in which the arrangement was communicated was fair/appropriate?  
(Why/why not? Given enough information? Sufficient justification? Communicated respectfully? Trustworthy information given? Does this matter to you?)

5.4. Do you think co-workers should always be made aware of such arrangements?  
(Why/why not?)



5.5. If no: In what circumstances should they be made aware? In what circumstances should they not be made aware?

**6. *Specific example of i-deal: HR not involved in negotiation***

6.1. Can you think of any instances where such arrangements were made within the organisation/your area of the business without you knowing or being involved?

6.1.1. Can you describe the arrangement?

6.2. How and when did you find out about it?

6.3. Do you think you should have been involved in the negotiation process?

6.4. How do you feel about the decision to agree to the arrangement?  
(*Would you have agreed or been against it?*)

6.5. What do you feel, if anything, is positive about the arrangement?

6.6. Do you think there are any downsides to the arrangement? What are these?

6.7. Overall, do you think the arrangement is fair?  
(*Why/why not? Fair to who? employee? co-workers? manager? business?*)

**7. *Denied i-deals***

7.1. Have you ever been involved in a request for an individualised arrangement being refused?

7.1.1. If yes: What was the request?

7.1.2. Who made the decision to refuse it?  
(*You? Manager? Senior manager? Anyone else involved?*)

7.2. Why was it refused?  
(*Feasibility? Unfair to give special treatment? Outside of policy? Worried about co-worker reactions? Didn't think employee deserved it? Worried about setting precedents?*)

7.2.1. Did you agree with the decision to refuse it?  
(*Why/why not?*)

7.2.2. Do you think the decision to refuse the request was fair?  
(*Why/why not? Fair to who? employee? co-workers? you? business?*)

7.3. Describe the process or discussions that took place while considering the request?  
(*Formal or informal? Meeting? HR involved? Co-workers involved? Senior manager involved?*)

7.3.1. Do you think this process was fair?  
(*Why/why not?*)

7.3.2. Were you worried about the fairness of the process?  
*(More or less worried about process fairness because you were refusing the request?)*

7.4. How was the decision communicated?  
*(Who by? In person? In writing? Give reasons?)*

7.4.1. Do you think the way the decision was communicated was fair/appropriate?  
*(Why/why not?)*

7.5. Were you worried about the employee's reaction to the request being refused?  
*(Why/why not?)*

7.5.1. Has the employee's attitude or behaviour at work changed following the refusal of the request?

7.6. Do you know if any co-workers are aware of the request and that it's been refused?

7.6.1. If yes: How did they find out?  
*(From manager? From employee? Did you want them to know? Why/why not?)*

7.6.2. How have they reacted?  
*(Attitudes? Behaviours?)*

7.6.3. If no: Why not?  
*(None of their business? Doesn't affect them? Worried about their reaction/attitude towards employee? Worried about their reaction/attitude towards manager or HR?)*

## **8. General attitudes towards i-deals**

8.1. How do you feel generally towards such arrangements being made?  
*(Generally in favour or against? Opportunity to be strategic? Flexible? Recruitment/retention/motivation tool? Exception to policies? Difficult to manage? Favouritism? Concerns? Benefits?)*

8.2. Do you think arrangements such as these should be available to all employees?  
*(Why/why not?)*

8.3. If no: Who should they be available to (if anyone)?  
*(Star performers? Employees struggling with performance? Employees struggling with work-life balance? In what circumstances? Recruitment tool? Retention tool? Motivate or reward performance?)*

8.4. Generally, what do you think makes these arrangements work well?  
*(Certain types of arrangement? Under what circumstances/conditions? Co-worker acceptance? Does communication matter? Does timing matter: during recruitment? Existing employee? Threatening to quit?)*

8.4.1. When do they not work well?  
*(What makes problematic? Contents? Under what circumstances/conditions? Does timing matter: during recruitment? Existing employee? Threatening to quit?)*

8.5. Generally, how would you describe HR's role in considering and forming individualised arrangements?

*(Involved or uninvolved? Aware or unaware? In support or against?)*

8.6. Do you think such arrangements can work alongside established organisational policies (e.g., pay and reward, flexible working, or training and development policies? *Opportunity to improve/develop policy? Undermine existing policy?*)

8.7. Have such arrangements ever led to wider policy change within this organisation?

8.7.1. If yes: What happened?

8.8. Do you think the type of organisation or the type of work engaged in here is suited to the formation of personalised arrangements?

*(Why/why not? How? Sector? Industry?)*

8.8.1. Would it be different in different departments within this organisation?  
*(Different managers? Different type of work? Specific to the work engaged in by employees? Skilled versus unskilled work? Customer facing or not?)*

8.8.2. How do you think it might differ in other types of organisation?  
*(Other sectors? Other industries? Why?)*

Finally, is there anything else about any of the arrangements we've discussed that you would like to raise, or is there anything that you think I've missed?

## **Appendix 7. Summary of topics: employee perspective**

Content of i-deal

Timing of i-deal

Motivation: why wanted?

Why granted? Do they care? Impact on subsequent attitudes and responses?

Details of negotiation process and who was involved

Impact on relationship with manager

Anticipated benefits and drawbacks for business

Actual benefits and drawbacks for business: short-term and long-term

Impact on relationship with employer

Anticipated impact (benefits/drawbacks) for co-workers/subordinates

Actual benefits and drawbacks for co-workers/subordinates: short-term and long-term

Impact on relationship with co-workers/subordinates

Concern about co-worker/subordinate reactions and actions to mitigate

Communication of i-deals to others, perceived fairness of communication

Overall perceptions of fairness

General attitudes to i-deals: when and why should they be used? General concerns around forming

Awareness and involvement of HR

Denied i-deals: why denied? consequences, perceptions of fairness

## **Appendix 8. Summary of topics: co-worker/ subordinate perspective**

Perceptions/understanding of why requested – fairness?

Perceptions/understanding of why granted – fairness?

Negotiation process and who was involved, perceived fairness

Benefits and drawbacks for employee: short-term and long-term

Behavioural responses of employee: short-term and long-term

Benefits and drawbacks for self: short-term and long-term

Behavioural responses: short-term and long-term

Impact of i-deal on ability to form own i-deal

Impact on personal relationship with employee

Benefits and drawbacks for manager: short-term and long-term

Communication of i-deal

Fairness of communication and impact on attitudes

Overall perceptions of fairness and impact on attitudes

General attitudes to i-deals: when and why should they be used? General concerns around forming

Consequences and impact of any management changes

Awareness and perceptions of denied i-deals

Awareness and involvement of HR

# **Appendix 9. Summary of topics: line manager perspective**

Why granted?

Negotiation process and who was involved

Impact of content on decision making

Impact of timing on decision making

Impact of employee motivation on decision making

Impact of employer motivation for granting on employee attitudes/responses

Impact on relationship with employee

Attitudinal and behavioural responses from employee

Impact of content/timing on employee responses

Concern about co-worker reactions and actions to mitigate

Co-worker perceptions and responses

Subordinate perceptions and responses (if LM flexibility i-deal)

Impact of content/timing on co-worker/subordinate perceptions and responses

Impact on employee/co-worker relationships

Perceived fairness of communication to co-workers (and impact of this on decision making)

Overall perceptions of fairness (and impact of this on decision making)

General attitudes to i-deals: when and why should they be used? General concerns around forming.

Awareness and involvement of HR

Denied i-deals: why denied? Consequences, perceptions of fairness

## Appendix 10. Summary of topics: HR perspective

Awareness and involvement of HR in the formation of i-deals

Level/details of involvement

Why granted?

Negotiation process and who was involved

Impact of content on decision making

Impact of timing on decision making

Impact of employee motivation on decision making

Impact of employer motivation on employee attitudes/responses

Attitudinal and behavioural responses from employee

Impact of content/timing on employee responses

Concern about co-worker reactions and actions to mitigate

Co-worker perceptions and responses

Subordinate responses (if LM flexibility i-deal)

Impact of content/timing on co-worker/subordinate perceptions and responses

Overall perceptions of fairness (and impact of this on decision making and attitudes)

General attitudes to i-deals: when and why should they be used?

Attitudes to i-deals when HR not involved in negotiation (including perceptions of fairness)

Denied i-deals: why denied? consequences, perceptions of fairness

## Appendix 11. Research information sheet

Thank you for taking the time to read about my research and consider whether you are happy to be involved. My research is focused on personalised employment arrangements that employees make with their employer. Within the academic literature, these personalised arrangements have been named “idiosyncratic deals”. These personalised arrangements can come in many different forms, but an example you might be familiar with are flexible working arrangements. These can occur when an individual – for example – has negotiated to work at specific times in order to fit in with their personal life. Other possible examples of personalised arrangements include career breaks, providing financial support for qualifications, tailoring the duties of a specific person’s job, and individualised reward and benefits packages.

My research aims to get a better understanding of these arrangements, how they work, and what different people within organisations think about them. I would therefore be extremely grateful if you were willing to meet with me so that I can ask you some questions on this topic. Participation would involve an interview that would last approximately 60 minutes and would take place during work time. To help me keep track of what we discuss, the interview will be recorded with a tape recorder unless you would prefer this not to happen. If you decide you would like to be interviewed but do not want the conversation recorded then this is not a problem and please let know. I will check this with you again before the interview starts.

The information discussed during the interview will be held confidentially and securely, and only I will know what you’ve said (nothing you say can be traced back to you). Taking part in the research is entirely voluntary. Please take your time to consider whether you would like to be involved. I have also sent you a consent form with more details about the research process and how the information we discuss will be used by me. Please make sure you read this carefully and let me know if you have any questions about its contents. If you decide to be interviewed, I will ask you to sign this consent form but you do not have to do this now. For now, it is only included to help you decide if you want to be involved.

This research is being undertaken as part of my PhD studies at Cardiff University, under the supervision of Professor Aoife McDermott, who can be contacted at the following email address: [mcdermotta@cardiff.ac.uk](mailto:mcdermotta@cardiff.ac.uk)

If you have any questions, please don’t hesitate to email me ([mackintoshc@cardiff.ac.uk](mailto:mackintoshc@cardiff.ac.uk)).



## Appendix 12. Interview consent form

This research is being conducted by Catherine Mackintosh as part of a thesis in partial fulfilment of the requirements for the degree of Doctor of Philosophy at Cardiff University. The project is exploring individualised employment arrangements, known as “idiosyncratic deals”. The research seeks to explore individuals’ experiences of, and attitudes towards, these arrangements in the workplace.

As a participant, you will be invited to take part in an interview to discuss your attitudes and experiences of idiosyncratic deals in the workplace. The interview will take approximately 60 minutes. Please be reassured that no real names of individuals or of any organisations will be documented in any notes or transcriptions of the interviews.

**If you are happy to participate, please read the below statements and sign at the bottom of the page.**

- I understand that my participation in this project will involve being interviewed about my experiences of, and attitudes towards, idiosyncratic deals (personalised employment arrangements).
- I understand that the research is being undertaken as part of the researcher’s PhD studies and may be used - in an anonymised form - in her PhD thesis, subsequent publications and workshops focused on the management of i-deals within organisations.
- I understand that participation in this study is entirely voluntary and that I can withdraw from the study at any time without giving a reason. I understand that I am free to refrain from answering any questions that I do not wish to answer. I understand that if I withdraw my consent, I can ask for the information I have provided to be anonymised, deleted or destroyed in accordance with General Data Protection Regulation.
- I understand that the information provided by me will be held confidentially and securely, such that only the researcher can trace this information back to me individually. The information will be retained for up to 1 year after the submission of the PhD thesis and subsequent publications, and will then be anonymised, deleted or destroyed.
- I understand that I am free to ask any questions at any time. If for any reason I have second thoughts about my participation in this project, I am free to withdraw or discuss my concerns with either Catherine Mackintosh ([MackintoshC@Cardiff.ac.uk](mailto:MackintoshC@Cardiff.ac.uk)), or her supervisor Professor Aoife McDermott ([McDermottA@Cardiff.ac.uk](mailto:McDermottA@Cardiff.ac.uk)) at Cardiff Business School.

I, .....(NAME) consent to participate in the study conducted by Catherine Mackintosh ([MackintoshC@cardiff.ac.uk](mailto:MackintoshC@cardiff.ac.uk)) of Cardiff Business School, Cardiff University, under the supervision of Professor Aoife McDermott.

Signed ..... Date.....

## Appendix 13. Ethical approval confirmation



Cardiff Business School  

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Ysgol Busnes Caerdydd

Mackintosh, Catherine  
Cardiff Business School  
Cardiff University

21 May 2021

Dear Catherine,

Ethics Approval Reference: 1819019  
Project Title: Exploring idiosyncratic deals from multiple perspectives

I would like to confirm that your project has been granted ethics approval as it has met the review conditions.

Should there be a material change in the methods or circumstances of your project, you would in the first instance need to get in touch with us for re-consideration and further advice on the validity of the approval.

I wish you the best of luck on the completion of your research project.

Yours sincerely,

Electronic signature via email

Dr. Debbie Foster  
Chair of the School Research Ethics Committee  
Email: CARBSResearchEthics@cardiff.ac.uk