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14/9/16 (Item 16 from file: 13)
DIALOG(R)File 13:BAMP

01106691 01783795 (THIS IS THE FULLTEXT)

The End of the Job As We Know It

(More organizations are breaking away from fixed job descriptions and responsibilities and moving towards distributed work, which presents a challenge for trainers)

Article Author(s): Williams, Caitlin P
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ABSTRACT:
William Bridges, author of the book "Fast Company" and "JobShift," discusses the evolution of his ideas on jobshift. He asserts that the technological advances and the workplace changes have affected the world of jobs. He believes that the time will come when the world would shy away from narrow job classifications and descriptions and where "dejobbing" would be the norm and the focus would be on the distribution of work will soon come. In most firms, employees increasingly perform work that are not included in their job descriptions, however this slow shift is more evident in high technology firms. Bridges attributes the phenomenon of jobshift to outsourcing, wherein companies transfer noncore responsibilities to outside companies to enable it to become more flexible and responsive. This shift has profound implications to the training industry. Instead of confining the training programs within the organization, firms would have to include their business partners, namely their suppliers and customers, in these initiatives. Training would have to be focused on issues of behavior, knowledge, attitude instead of being job-based.

TEXT:
by Caitlin P. Williams

Author William Bridges challenges us to train people who don't have job descriptions.

For the past year, Fast Company has been introducing readers to such concepts as "Free Agent Nation" and "Project: You." Yet, author William Bridges was charting the territory of the free agent nation long before. In 1994, Bridges wrote JobShift, a book proposing that traditional jobs were radically changing. The notion of a full-time, permanent job, and the job description as a neat way of knowing your duties and responsibilities, were giving way to a much more fluid emphasis on "doing the work that needs doing," in Bridges's words.

In a series of recent interviews and keynote addresses, Bridges has been discussing how his ideas on JobShift (Bridges has trademarked the term) have continued to evolve. He has been updating his thoughts on the distribution of work, the realities of the emerging workplace, outsourcing, and what it all means for HRD, trainers, and workers in the late nineties.

In a recent seminar, Leading Organizations Through the JobShift, Bridges discussed his perspective on how he sees the world of jobs changing. He still foresees a shift away from narrow job classifications "dejobbing" is prevalent and the emphasis is placed on the distribution of work.

Bridges says, "What I'm calling the JobShift is the migration of work away from the fixed boxes that we've always called jobs. For example, Get a job. Your cousin got a good job. Why didn't you get a job? We've been brought up to equate work with jobs, with getting a job. When you get hired, you've got a job. American and Western organizations are very job centered.

"I don't want to say that no job will exist in 20 years. There's a continuum, with work at one end that probably needs to be spelled out in very specific duties. For example, nuclear power plant workers should have clear job descriptions--no messing around. On the other hand, there are whole industries, such as filmmaking and consulting, in which job descriptions don't play any real role. Jobs are not the way work gets done. Work gets done in cross-functional teams. It's outsourced to a group that isn't even made up of employees; it's done by temps. Now we can extend the word job to cover all those conditions, but notice what we're doing. We can't say, That's my job anymore."

photo omitted

More organizations, especially those in fast-moving industries, in which technology is rendering place and time unimportant, are breaking away from those fixed entities called jobs.

The head of operations at a computer firm recently said, "You know, I just can't move the boxes around fast enough any longer. I can't write out new job descriptions every week. So we still hire people by job descriptions, because how else are we going to hire them? But as soon as they are in the door, we forget about those job descriptions."

The trend has some people balking. An HR recruiting professional recently expressed his concern about making sure that job applicants were given very complete job descriptions so they would know exactly what their jobs would entail. Although Bridges advocates less reliance on job descriptions, he acknowledges that they can be useful. He says, "I think there's a negative part of job descriptions and a positive part. The negative part is that I don't think that the HR person who made that statement has thought through the changes in the workplace. He or she is still playing off an old paradigm. But the positive side is that I think the person who is coming in to work really does need to understand the needs of the organization much more than the previous job applicant did.

"The old job applicant simply needed to know whether the firm needed any accountants, for example. And then, if you're an accountant, you get hired or you don't get hired. And if you get hired, they tell you what to do."

Although Bridges identified outsourcing as one element in the pattern that he calls JobShift, he recently wrote this in Organizations in Transition: "I have come to see things differently and to realize that the dejobbing of work is being paralleled by a separate and different process of distributing work."

Bridges defines distributed work as "a more strategic attitude and action that starts with the idea that the organization shouldn't try to do everything itself, not just because it doesn't do it well. When an organization invests in all of these far-flung activities, it becomes much less mobile, much less responsive. So, the organization builds some kind of dynamic structure around distributing work across a group of suppliers or across a group of sources, and that distribution goes way beyond outsourcing."

This distribution of jobs has implications for trainers, says Bridges. Trainers are no longer responsible only for training employees in their own organizations, he suggests. Suppliers and customers also have needs to be addressed by the training department. Bridges says, "The answer isn't to limit training to the core employees."

Distribution and providing training for business partners outside the company present challenges for trainers, Bridges continues. He envisions a work world in which job-based training becomes outdated and "training becomes much more an issue of behavior, of knowledge, of attitude, so training gets unplugged from the narrow skill job base."

How should HR traditionalists respond to these new workplace realities? Bridges suggests that the job-based functions of HR--hiring to fill a job function, evaluating on the basis of how well the job is done, setting salaries as compensation for doing a job--cause the HR field to get left behind. In order to rethink policies as a way to bring HR back in touch with the jobless working world, Bridges advocates a more all-encompassing HR function. He says, "The big challenge is to extend human resources services and policies to all of the constituencies that are actually contributing to the manufacturing or the service. The old idea that we took care of full-time, long-term workers (but other people didn't get bonuses or training) is self-defeating. The work is now being distributed so widely that HR needs to throw out a much wider net, including covering those who aren't employees in the traditional sense."

Bridges espouses a greater role for trainers and HRD specialists. He believes that HRD should be a true business partner instead of a support function. He recommends that HR stop looking at itself as a department and start thinking of itself as a little firm. Try Bridges's Outsourcing Exercise: "Start out with a hypothetical situation--pretend you're all being let go. If you were told, however, that you could bid back on the work if you had an independent firm, how many of you would want to join the independent firm? Would some people just walk away because they really aren't interested in this anymore--because the only thing keeping them here is a regular paycheck? Well, that's good to know.
"When you get clear on who is going to stay, then have a marketing meeting. Ask yourselves, 'How are we going to serve the needs of this big new client we have, and what other clients might we take on? What are our core competencies, and what are the deliverables that we ought to provide?'" How does an employee survive as a Citizen of the Distributed Workplace?

Bridges offers the following advice: "Really learn what your resources are. People who see themselves only in terms of their job descriptions don't see what their strengths are. Further, learn to see the world around you as markets with unmet needs. So many people look at change as a disruptive element, as something that takes something away from them. But change always creates unmet needs, so if people can refine their abilities to see the world, then they're always seeing possibilities and opportunities. This is just as true in HR as anywhere else."

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Doing the Work That Needs Doing: Conversations With the Leaders

Edwin Booth, CEO Job Boss Software Minneapolis, Minnesota
Williams: When William Bridges wrote JobShift in 1994, he included Job Boss Software as a company that was "doing the work that needs doing" in innovative ways. In your role as CEO, how do you contribute to getting work done differently?

Booth: We've experienced 60 percent growth this year, and we're booming. I attribute our growth to our competitive advantage, which is our culture.

My job is to make sure we have an environment in which people are genuinely convinced that they have the best opportunity to grow and develop, to increase their personal skills, to practice leadership, to be a member of a community, to be a part of something bigger and more important than themselves, and to make a positive contribution. When you do that, your people are totally focused on doing what's best for the business and for the customer. In turn, our customers become raving fans, and our reputation spreads in the marketplace. Twenty-five percent of our new customers come from referrals. They call us because of a customer of ours that they trust. So, I spend a tremendous amount of my time building the environment and the culture and the work attitudes.

Williams: How does training get done at Job Boss?
Booth: The notion of training is a narrower notion than learning. But what we're doing is trying to create a community that is constantly learning and improving. I train and get trained. Everyone in the organization trains and gets trained. And we do it most of the day, all day long.

That's the definition of what our work is. Our work is to improve the process that we use--which includes the product, how we make it, how we support customers. how we work together in teams, and so forth.

Williams: How do you accomplish those goals?

Booth: Our employees go through a formal orientation, attend a 13-week semester at Job Boss University, and go out to several customers.

We do ongoing functional training and ongoing development. It's absolutely clear within each team what people are expected to do. Then within that framework, it's a free-for-all. We create alignment around our values, our strategies, and the fundamentals of our plan. If you maximize freedom without a framework, you have chaos. But if you can create a framework and then maximize the freedom, you can create the fastest-learning and fastest-improving organization.
Williams: What's next for Job Boss?

Booth: The next big wave for us is not only how we can continue to be a learning organization, but also how we can motivate and enable our customers to become learning organizations.

Al West, CEO, SEI Investments, Oaks, Pennsylvania

Williams: Fast Company recently described some of the innovative ways SEI does "the work that needs doing." The article mentioned that you've removed walls, reorganized into teams, and so forth. Why did you choose to do business differently?

West: Most of it, I considered a necessity. It certainly makes work more effective and more efficient. Most of what we've done is either to serve clients better or to get better ideas. The changes resulted in lower costs and allowed us to respond to change a lot faster. One of our tenets is that our work is all about managing and accommodating change and being flexible, because the world is changing so rapidly. That includes learning. It's all about constant learning.

Williams: How do you ensure ongoing learning for your employees?
West: We rather distrust formal programs. We don't have job descriptions or an organizational chart. That has been the case for a long time, so these are old, ingrained things.

We believe learning needs to happen naturally. If it happens to the person who needs it most, so much the better. If it's not driven by a need, then it won't be worthwhile.

Williams: How do you go about your learning and your work?

West: We tend to leave it up to the individual. No one comes along and says, "You need to know this or that." When we went to teams, we trained 100 people to be team facilitators. Actually, they didn't make great facilitators, but they learned a lot about teams and how teams function versus how individuals function. We're also working hard on an intranet to make it more of a learning device.

Other than that, we just preach about how to keep everyone attuned. If someone comes to you and wants to know something, tell him or her. So it's a lot of teamwork, a lot of collaboration. We felt that it was the most important thing to bring into our culture. Rather than hoard information, give it freely. When you need to know something, it will work in reverse. This system just makes everything work a lot better. You must create an environment for learning to occur; if you do that, it will happen much more naturally. That's a tough job. We've been at it for about eight years now, and we've made tremendous progress. But we've got a long way to go, and I think we're fairly far out there.

Williams: What has been the biggest impact of the changes you've made?

West: Clients love it. They get so much better service from a team than they did from an individual. Without secretaries, clients call right into the team line and anyone can pick it up. So clients get a team member, rather than someone who might not know as much. And since the employees are in a totally open environment, they learn more about all of the clients because it's happening around them and they can hear more. They keep up to date.

So, client service has improved dramatically. We're getting better performance out of teams, and we're getting better products. Our quality has gone up, and our clients have benefited from it. Our stock price also reflects that quality. Our client loyalty is as high as it has ever been.

Williams: Any words of wisdom for companies thinking of changing to teams?
West: The number 1 thing is that there has to be a business reason for doing it. You must have enough courage to stick with it. I think when you first start this stuff, the employees are going to say "Oh, this is the program du jour. I'll just wait it out." Hang in there. Just because the employees don't believe for a while doesn't mean they won't become believers, if you follow through long enough. You can convince people that you're serious.

Rebecca Clements, Human Resources Director PhotoDisc Seattle, Washington

Williams: Do you use job descriptions at PhotoDisc?

Clements: We think it's important for hiring managers to know what they want someone to do and likewise for the candidate. The job description is sort of a guideline and a tool. Things move so quickly around here that a job description is not really a comprehensive look at what someone does. It's not a laundry list of someone's responsibilities. We'd need a team of people to be constantly updating the job descriptions to make sure they're accurate.

Periodically, employees may update their job descriptions to communicate with their managers about what they're currently doing and what they want to be doing. That is more as a vehicle for development and moving forward, rather than documentation.

Williams: How do you train?

Clements: We have our PhotoDisc University, similar to other corporate universities. It focuses on building knowledge, skills, and information that will help people be successful in their jobs, but it doesn't focus on any particular job or how you get that job done. When people start here, most of their learning is going to be hands-on.

Williams: What has been the impact of changes you've made?

Clements: Let's use our sales and service group as an example. We decided to grow the talent within the team using two people who were already doing some training in the group, rather than hire an external trainer. We did this for a variety of reasons: They're very close to the work itself, they're knowledgeable about the products, and they know the customers' needs. The result has been positive because we're using people who moved up from entry-level spots in the organization. One of these people has a teaching background and the other just happens to have a good style and ability for training. Within our corporate university as well, people get many opportunities to teach courses.

Virginia Tahmahkera Organizational Development and Planning Manager Zoological Society of San Diego San Diego, California

Williams: In JobShift, William Bridges highlighted the San Diego Zoo as one of the organizations doing things differently in the workplace. Can you tell me more about your employee development initiatives?

Tahmahkera: We have multifunctional work teams and project teams. We bring together people who need to be on a project, based on expertise and skill. They work on the project, make decisions, and implement the process.

Williams: When the project is finished, are employees reassigned to wherever they're needed?

Tahmahkera: Exactly. When I read Bridges's book, I thought: "That's exactly what we' re doing here."

Williams: How long have you been working this way?

Tahmahkera: Well, we began almost 12 years ago. We started with quality circles, which was really the beginning of managing differently, and we've moved into this process that naturally brings people together based on the needs of a particular project.

Williams: Why did the zoo change to project-based teams?

Tahmahkera: The outcomes have been so good. From an internal perspective, people support what they help to create. Camaraderie grows from working together. And the product is better. Because employees have more input into their work lives, we have highly committed employees, which affects the guests' experience.

Williams: What are some of the initiatives you're working on now?

Tahmahkera: We have a new HR initiative, called the Professional Development Plan Program. Bridges wrote about identifying what's new for managers and identifying skill clusters; we're doing that. We've used the 1998 ASTD State of the Industry Report to define specifically what we wanted to do with the PDP.

We have a state-of-the-art program called Animal Care Education or Keeper Training. We measure performance with the help of animal care leaders. There's a lot of employee involvement and evaluation.

Williams: How do you provide the training you need?

Tahmahkera: We use in-house experts for training, rather than the organizational development and planning staff. For example, instead of OD&P giving a seminar about public relations, members of the public relations department talk about it. Instead of OD&P talking about our Center for the Reproduction of Endangered Species, we have two or three researchers talk about their specialties and about CRES.

Williams: What are the challenges of making these changes?

Tahmahkera: The main challenge is the question that employees ask, which is "What's my job becoming?" and the fear that's associated with that. So, our challenge has been to demonstrate in OD&P what everyone will be doing. We have to "walk our talk" in this department, because I think people are looking at us differently now.

The challenges are to maintain relationships that get the job done and learn to deal with disagreements and conflict. As the picture becomes clearer and people come to an agreement on what that picture is, the fear and anxiety are lessened.

Williams: Any words of wisdom for other companies who are making workplace changes?

Tahmahkera: You have to find out what's good for your culture. We have taken our time in developing our new work ways.

Nicki Artese, Vice President of Advertising and Public Relations, Reserves Network Cleveland, Ohio

Williams: How does the temporary and staffing industry support organizations that are distributing their work in new ways?

Artese: The ways that organizations are doing business differently today are the very reasons why the staffing industry is growing like it is. Companies are shedding anything that isn't a core competency. The hiring and training functions are among the most commonly outsourced functions.

Also, there are new things happening that weren't five or six years ago. Now, in large manufacturers and sometimes even large professional businesses like call centers--anywhere the use of temporary help is significant (more than 50 people a day)--companies like ours are setting up an on-site office. At these on-site offices, we staff and manage the temporary help workforce, sometimes around the clock for all three shifts.

Williams: How is the temporary and staffing industry growing?

Artese: The industry has been growing at a rate of 15 percent or so every year. There are several reasons for this growth, and, though certainly not primary, one reason may be the falling away of job descriptions. Another may be the falling away of multiple levels of pyramid-style management. Another factor is the virtual corporation-eventually, there won't be such a thing as a corporate office with 20 people running it. It will be a couple of people outsourcing every single function to groups of specialists who work for multiple companies.

As long as companies want to find experts for certain functions, especially at a time when unemployment is at a 28-year low, I don't think this industry will experience a cooling period anytime in the near future.

Williams: What does that future hold for your industry?

Artese: I think training is going to become bigger. Everyone says they train in one way or another, but I've watched the level of training here at Reserves Network accelerate because of demand. Also, the need for training in reading, writing, math, English as a second language, and employability skills will grow. All of this will be led by computer training.

I think training will stop being an "elective" and become a mandatory part of what the industry does. I think the industry will move more into HR management, including such areas as employee relations, compensation and benefits, and compliance education.

Michael Sato Corporate Director for Worldwide Solectron University Solectron Corporation Milpitas, California

Williams: Please describe Solectron's business and how you serve your clients.

Sato: Solectron is a worldwide provider of electron manufacturing services to leading, original equipment manufacturers. We offer our customers a full range of integrated solutions across the entire product life cycle, from design to manufacturing to end-of-life services, as well as warranty and repair.
We're an extension of a totally vertical manufacturing system. Clients treat us as if we're part of their company, and they expect similar kinds of cost savings and services. So, it's always a delicate balance to let clients know we're a self-standing organization with client needs other than theirs.

One of the ways we serve clients is by absorption of their manufacturing process. We grow a lot from acquisitions as well as by organic growth, once we have the sites. For example, we've acquired a site in Brazil that was formerly Ericsson's. We just acquired an IBM site in Charlotte. We go in and work with that site, look at all of the technology it has, and, when it's appropriate, upgrade it to the current standard.

Williams: What happens to the former owner's employees who were working at the site?

Sato: We have a very high retention rate of existing employees. One of the things we pride ourselves on is that we acquire everything and everybody, not just the technology. We tend to retain the current workforce and make a great effort to do that.

When we received our Baldrige Award, it was noted that we make a big effort to look at the people, the skills, and the other attributes that go hand in hand. We're concerned not only with what the acquired sites do. meaning the technology and systems, but also how they do it and the people who contribute to that.

Williams: How do you design and deliver training?

Sato: We have external vendors. I'm also trying to develop in-house capabilities and expand insourcing, as opposed to outsourcing. There are always content experts in any organization. Some have a natural inclination for training, and you can use them to pass on the information.

What I'm trying to develop is an insourcing model that takes advantage of that in-house expertise. What people bring in addition to the content knowledge are the experience and the relevancy of the application of that knowledge. Knowledge for its own sake isn't useful unless it's applied in some way that meets and solves a business need. The model for me is that training is really about knowledge management. There's an old saying: "We're drowning in information and starving for knowledge."

At the sites that don't have a large training presence, I'm trying to develop learning centers around the country and internationally that I can "import" training to.

COMPANY DEPARTMENT NAME: Human Resources
NAMED PERSONS: Bridges, William
CONCEPT TERMS: Human Resources; Job description; Training; Trends
GEOGRAPHIC NAMES: United States (USA)
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14/9/49 (Item 32 from file: 15)
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01796017 04-47008
Keeping pace with the teleworker army
Anonymous
Inc. v21n5 PP: 22 Apr 1999 CODEN: INCCDU ISSN: 0162-8968 JRNL CODE: INO
DOC TYPE: Journal article LANGUAGE: English LENGTH: 1 Pages
WORD COUNT: 244

ABSTRACT: A recent survey by Cyber Dialogue found that the US population of what it called "teleworkers" leapt by 41% last year, to 15.7 million. Many startups are popping up to meet the demands of a more mobile workforce.

TEXT: The growth in this industry is going to be explosive," says Mark Wiatrowski, founder and press dent of Executive Office Club, based in Washington, D.C., which provides "ondemand" office space by the hour. Last year the companys revenues totaled $325,000, and sales are doubling every eight months, says Wiatrowski, who attrib utes the companys success to the burgeoning army of people who work while they're on the road.

A recent survey by the market-research firm Cyber Dialogue (cyberdialogue.com) seems to buttress his case. The survey found that the U.S. population of what it called "teleworkers" leapt by 41% last year, to 15.7 million from 11.1 million in 1997. Cyber Dialogue projects an additional increase of 15%, to 18 million, in 2000. That's a far cry from the 1990 figure-just 4 million. Among traditional full-time workers nearly half do some teleworking.

Watrowski's company, which was founded in May 1997, is hardly alone in meeting the growing demands of a more mobile workforce. Tech-Ed Networks Inc., in Roseville, Calif., has begun installing business centers in hotels, as has Busi ness Anywhere USA, started in September 1997 and based in Santa Ana, Calif.

And there are a range of businesses that provide support and information services to the teleworking brigade. They include Tmanage, a turnkey telework and systems-integration business based in Austin, which helps companies develop a telework strategy; and Travel E-Fix, an Atlanta on-line service that evaluates the teleworking features of hotels, airports, and other facilities.

THIS IS THE FULL-TEXT.
GEOGRAPHIC NAMES: US
DESCRIPTORS: Trends; Polls & surveys; Telecommuting; Startups
CLASSIFICATION CODES: 9000 (CN=Short Article); 9190 (CN=United States); 6100 (CN=Human resource planning)
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14/9/54 (Item 37 from file: 15)
DIALOG(R)File 15:ABI/INFORM(R)

01785766 04-36757
The changing temporary work force: Managerial, professional, and technical workers in the personnel supply services industry
Melchionno, Rick
Occupational Outlook Quarterly v43n1 PP: 24-32 Spring 1999 CODEN: OOQUAK
ISSN: 0199-4786 JRNL CODE: OOQ
DOC TYPE: Journal article LANGUAGE: English LENGTH: 9 Pages
SPECIAL FEATURE: Charts Graphs
WORD COUNT: 719

ABSTRACT: Working smarter has become the slogan of the 1990s for cost-conscious companies. One way many businesses have embraced the phrase is by using temporary workers - and not just for clerical tasks. Temporary workers are in positions previously filled by permanent employees, such as managers or scientists, and many have skills that did not even exist a few years ago. Demand for temporary workers in managerial, professional, and technical occupations is greatest in industries such as financial services, health care, telecommunications, and information technology. The temporary help industry is discussed, highlighting managerial, professional, and technical workers. Advantages and disadvantages of temporary work are listed.
TEXT: Headnote:

Managerial, professional, and technical workers in the personnel supply services industry

(Photograph Omitted)

"Working smarter" has become the slogan of the '90s for cost-conscious comapnies. One way many businesses have embrased the phrase is by using tempory workers - and not just for clerical tasks. Temporary workers are in positions previously filled by permanent employees. such as managers or scienctist, and many have skills that did not exist even a few years ago. Demand for temporary workers in managerial, professional, and technical occupation is greatest in industries such as financial services, health care, telecommunications, and information technology.

Although highly skilled temporary workers are common today, they were not always the norm. The first "temps" received little or no training to help businesses with short-term clerical projects such as collating and inventory control. The next wave of temporary workers required a few more skills to perform secretarial and administrative duties-including typing, filing, and answering phones-to fill in for absent staff members.
The image of temporary workers doing repetitive, low-skilled tasks has grown as outdated as black and white television. Higher skilled workers, ranging from laboratory technicians to lawyers, increasingly make themselves available for temporary assignments. Companies recognize the convenience of having temporary workers for an expanding variety of short-term activities. And the firms that supply temporary help to these companies now specialize in placing skilled workers.

This article discusses the temporary help industry, highlighting managerial, professional, and technical workers such as accountants, scientists, and information technology specialists. The first section describes the participants in temporary help services: Temporary help supply firms, temporary workers, and client companies. The second section is a review of the advantages and disadvantages of temporary work. The final section presents some things to consider about temporary work, along with suggestions on how to find it. An accompanying box, "Composition of the Personnel Supply Services Industry," explains how the Bureau of Labor Statistics (BLS) defines the temporary help industry.

Temporary help: What-and who-is it?

The personnel supply services industry, which consists primarily of the temporary help industry, has grown substantially since 1981. (See chart 1.) In 1996, nearly 9 out of 10 workers in the personnel supply services industry were employed by temporary help supply firms. According to BLS, employment in personnel supply services will grow 53 percent between 1996 and 2006-making it one of the fastest growing industries in the economy.

The temporary help industry comprises temporary help supply firms and the people working in temporary jobs. Every temporary employment arrangement also involves a client company that uses the temporary workers. But these client companies are not part of the temporary help industry because they are in other industries.

The temporary help formula is simple: Temporary help supply firms provide temporary workers on a contract basis to client companies. Temporary workers are then under the client company's direct supervision but receive a paycheck from the temporary help supply firm; the firm bills the client company for the worker's wages, along with a fee for providing the worker placement service.

The roles each of these participants has in the temporary help industry are described below.
Temporary help supply firms The services of temporary help supply firms, also known as temporary placement or employment agencies, distinguish temporary workers from other nonpermanent workers, such as consultants, contractors, and freelancers. These other nonpermanent workers must find work on their own; temporary workers rely on temporary help supply firms to find work for them. According to Kennedy Information's The Directory of Executive Temporary Placement Firms, over 230 U.S. firms now specialize in placing managerial, professional, and technical workers in temporary jobsmore than five times the number that existed in 1990.

Temporary help supply firms recruit, screen, place, and pay temporary workers. To meet the demand for managerial, professional, and technical workers, temporary help supply firms are stepping up their recruitment efforts. Recruitment methods include placing advertisements in the newspaper, on the Internet, or in trade journals. Many firms offer finders' fees to existing temporary workers for bringing in applicants who are later placed.

Firms' application and screening processes vary. Some firms accept resumes while others require applicants to complete a form. Most conduct background and reference checks, examinations to evaluate skills or personality traits, and
Author Affiliation:

Rick Melchionno is an economist formerly with the Office of Employment Projections, BLS.

THIS IS THE FULL-TEXT.
GEOGRAPHIC NAMES: US

DESCRIPTORS: Temporary employment; Trends; Advantages; Disadvantages; Occupational choice
CLASSIFICATION CODES: 6200 (CN=Training & development); 9190 (CN=United States)
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14/9/63 (Item 46 from file: 15)
DIALOG(R)File 15:ABI/INFORM(R)

01755553 04-06544
The portable manager
Walsh, Jack
Electric Perspectives v24n1 PP: 16-20 Jan/Feb 1999 ISSN: 0364-474X
JRNL CODE: ELP
DOC TYPE: Journal article LANGUAGE: English LENGTH: 5 Pages
WORD COUNT: 2475

ABSTRACT: The issue of managing change and transition brings with it an interesting management paradox. Many companies have undergone a decade of downsizing that has left their organizations much flatter. However, now they need a more diverse range of knowledge and management expertise than ever before in order to implement the business projects they face. Ironically, flattened companies are choosing to bulk up by rebuilding some of their depleted management ranks. Reports from the Bureau of Labor Statistics indicate that managers are now a bigger part of the workforce than they were in the 1980s. In fact, managers, administrators, and executives represent the fastest-growing employment category. Fifty-six percent of 4,000 companies recently polled said they intended to add to their managerial ranks this year, the highest rate in the survey's 15 years. In addition to building their core of permanent mangers, companies are turning to management and staffing strategies that include using outsourcing firms and temporary or contract workers.

TEXT: Headnote:

For many American companies, moving talent and knowledge in and out of the organization to meet emerging challenges is the way to go.

The issue of managing change and transition brings with it an interesting management paradox. Many companies have undergone a decade of downsizing that has left their organizations much flatten But now that they are pared-down and streamlined, they find they need a more diverse range of knowledge and management expertise than ever before in order to implement the business projects they face.

Ironically, flattened companies are choosing to bulk up by rebuilding some of their depleted management ranks. Reports from the Bureau of Labor Statistics indicate that managers are now a bigger part of the workforce than they were in the 1980s. In fact, managers, administrators, and executives represent the fastest-growing employment category. Fifty-six percent of 4,000 companies recently polled said they intended to add to their managerial ranks this year, the highest rate in the survey's 15 years.

In addition to building their core of permanent managers, companies are turning to management and staffing strategies that include using outsourcing firms and temporary or contract workers. To reduce overhead, maintain productivity, and increase flexibility, companies are looking for opportunities to hire human resources on a variable rather than a fixed basis. That means more temps-in fact, the $280-billion outsourcing and staffing industry continues to grow by 20 percent annually. On any given day, according to the National Association of Temporary and Staffing Services, some 2.6 million Americans are working as temps, representing a base of 10 million workers who are registered with the nation's temporary employment agencies.

The requirements for flexible management and flexible human resource strategies are meeting at the executive level. In addition to the clerical or staff temps they have used for years, many companies now use executive temps. In fact, growth among temporary workers is most dramatic at the executive level. In the decade from 1985 to 1995, one national staffing firm saw demand for its white-collar temps go sky high, as its revenues went from $7 million to $628 million. Executive search firms reporting on employment trends have shown that demand for interim executives tripled from 1996 to 1997.

Traditionally, companies have used clerical temps to pinch-hit for absent workers or to increase capacity during busy seasons. The executive temp-the portable manager-- offers a greater advantage, however. Such interim managers allow companies to transfer knowledge and experience into their organization on a kind of just-in-time basis. Recently, for example, a large Northeast utility needed market research performed quickly because of a series of power outages and associated public relations gaffes. The company was concerned that the outages would have a negative impact on a series of product introductions it had planned and hired an experienced interim executive who had conducted several market surveys across many industries, including the energy industry. He understood the methodology required to provide the utility with answers to its concerns. It took him three months to complete the research and deliver the report.

Another utility had a number of questions regarding a possible foray into telecommunications. Were its right-of-way locations of value in a telecommunications company? Did it make sense to create a joint venture, acquire a cable television outfit, or position itself as a local exchange carrier? Should it look for a long-distance carrier as a product distribution partner? The company engaged a portable executive from the telecommunications industry. He had AT&T experience applicable to each of the utility's potential opportunities. He was able to define each scenario from both technical and financial perspectives, and the company was able to choose a direction.

(Illustration Omitted)

Portable management is becoming a mainstream trend and a favorite of some management gurus who paint a picture of future organizations as being increasingly boundaryless and peopled with increasing numbers of nonpermanent workers. "The organization of the future will function more like a dynamic set of interrelated communities than a rigid series of top-down hierarchies," says James Barksdales, CEO of Netscape Communications. "As the global pace of change increases, organizational boundaries will become more fluid and community members will come from both inside the organization (employees) and outside the organization (customers, suppliers, and partners)." In such a workscape, we may all be faced with the reality that we must not only use flexible contract and transient workers, but also become one. Today portable managers are playing a growing role in the modern enterprise.

To the Rescue

How does interim management work? Who is using interim management and what are its pros and cons?

In the late 1980s when management firms supplying contract executives first began to emerge, they did so just as corporate downsizing was hitting its peak. They couldn't give managers away, not even short-term ones, because companies were letting hundreds of loyal, capable executives go every day. Interim management was born into a corporate America that, with the exception of certain groups of portfolio managers, had no use for the strategy.

But, of course, there was a surplus of good managers. Many executives in the 1980s, especially those who had benefited from a golden parachute or lucrative settlement package, felt financially secure and often were not inclined to find another permanent position. Nevertheless, they were out of work, so these often extremely accomplished professionals opted to sign on with emerging interim management firms. And, after the Wall Street crash in 1987, many portfolio and corporate managers soon realized that, even in a bad economy, it was difficult to attract good managers to companies whose very survival was in question. Qualified executives who could turn around troubled companies and lead them toward health were often hard to come by. The new portable managers were willing to go on interim assignments to repair troubled situations.

For instance, one early portable CEO, Malcolm Sherman, who had formerly held the top slot at Regina Electric and Zayres department stores, took on the job of turning around Channel Home Centers, a chain of home improvement stores. He rolled up his sleeves, brought his experience and leadership to the assignment, and made decisions to help resolve problems that were arising from forced cutbacks in staff and inventory. Sherman was unconcerned that his interim job might not last-the company he had joined was in danger of disappearing anyway. He enjoyed the challenge and had no expectation of permanent work.

In the early 1990s, the Wall Street)ournal reported on the high costs of companies hiring and then having to terminate executives who did not work out on the job. Search fees combined with fringe benefits and severance costs made bad hiring decisions expensive failures. So, interim management firms invited companies to testdrive executives by allowing them to manage short-term (six-to-twelve -month) projects, during which time, the executive and employer could audition each other before making a long-term commitment. Should the relationship not work out, the executive was compensated for the work he had performed, but the company was not tied into paymg severance costs. companies ana executives otten were pleased with the flexibility the arrangement offered. In one instance, the president of a furniture manufacturer first retained a vice president of marketing for a six-month project and then engaged him permanently. "In some situations," the president said, "a lengthy engagement can be preferable to a hasty marriage. Even after rigorous interviewing, it's not until you've seen an executive in action for a few months that you know if he'll really make the grade."

Managing at the Speed of Change

Today, companies are finding more and more applications for the interim management approach, such as quickly filling high-level positions left empty when an executive departs suddenly. Companies can also use portable managers to backfill positions for a limited amount of time to phase out or phase in an area of operations. For example, when a large pharmaceutical company underwent a widespread reorganization of its finance department, it installed a new accounting system that for nine months ran in parallel with the old one. Ten portable accountants backfilled positions and managed the old system. The number dwindled to one and then none as the new system came online.

For the most part, companies use portable executives because they see it as a way to "rent" expertise and experience for just the time it takes to implement a discrete project. Traditionally, an enterprise relied on its permanent executives to manage operations and on outside consultants to analyze operations and recommend changes to the business design. But for rapid change, this approach has limitations. Consultants can recommend new strategies, but who (unless the consultancy is huge) will implement them? It is a problem, especially in the face of complex and costly projects such as those to upgrade and integrate information technology, to implement supply chain synchronization, to join the world of electronic commerce, to open up international markets, to integrate newly acquired companies, or to carry out innovative manufacturing programs and complicated certification programs. Moreover, the executives on staff are often already stretched thin and do not always have the knowledge and skills to plan, develop, implement, and maintain a new initiative.

Portable executives can be a solution. For example, a midsized not-for-profit company that manages pension and insurance operations needed an interim chief information officer (CIO) to manage day-to-day systems and data processing, while preparing and retraining staff for a new clientserver environment. The company needed an executive who had managed a large information services department and helped manage the transition from a mainframe computing environment to a network client-server environment. The key to the assignment, however, was the interim cIo's skill as a transition facilitator to help direct employees who did not report to him.

The company retained an interimCIOwith more than 20 years' experience in information systems management who had had total responsibility for applications programming, computer operations, communications, technical support, and personal computer network support. At the end of her year-long assignment, the transition to the new technology platforms was deemed a success-and she left.

Managing Human Capital

"Faster, in almost every case, is better," says Jack Welch, CEO of General Electric. "From decision making to deal making to communications to product introduction, speed, more often than not, ends up being the competitive differentiator." For companies in such fast-- moving industries as high-technology, healthcare, energy, telecommunications, and chemicals, this is particularly true. Portable managers enable speed of execution because typically they have already solved another company's similar challenge. They may not know everything, but they know what must be done to implement a pending program.
"The work of leadership in the new corporation," writes Rosabeth Moss Kanter, former editor of Harvard Business Review, "will be to organize both sequential and synchronous projects of varying lengths and breadths through which varying combinations of people will move, depending on the tasks, challenges and opportunities facing the area and its partners at any given moment."

Fast Company magazine recently stated that America is becoming a "free-agent nation," peopled more and more with workers who are comfortable selling their skills on the open market and migrating from company to company wherever their experience is needed and where they can gain experience and add knowledge to their growing skills portfolio. Mobility, not stability, is the theme of the modern career, just as it is the theme of modern enterprises that engage contract managers when they need them and then willingly let them go when they don't.

It is no surprise, therefore, to learn that most full-time permanent management positions last less than three years. The positive side of such relentless turnover is that it fills and replenishes the growing pool of interim and project managers. Consequently, companies can reach out into the employment marketplace and draw on a growing contingent workforce for the skills they need.
WHO ARE PORTABLE EXECUTIVES?

Interim managers are typically qualified executives who are unemployed or in transition and therefore ready for duty immediately. They are also comfortable working on a flexible contract basis. While they labor full time and under the supervision of the client company, they are actually employees and remain on the payroll of the interim management firm that places them on assignment. They have often developed a range of specific problemsolving skills that they can carry and apply to various short-lived assignments. And they have a portable mindset: They

* see themselves as a personal service business entity rather than an

employee,

* view their skills as "product" or stock-in-trade rather than part of a job description,

* recognize that they have clients and customers rather than employers,

* focus on results rather than status,

* pursue continuous learning rather than job training,
* are flexible rather than rigid,

* have peer/peer rather than boss/worker relationships, and * seek a reward for adding value rather than gathering only salary.

It is the role of the portable manager to join a company's team and focus on results, to be above turf issues and politics. And often the manager does not represent a good long-term fit for a company. Rather, the portable manager is there to achieve specific results and sometimes be a conduit through which important skills and knowledge can be transferred into the organization.

The best portable managers are mentors who can help reskill staff and improve their performance. When an interim purchasing project leader recently joined a consumer goods manufacturer, his major objective was to achieve cost savings by implementing the processes, methodologies, and best practices needed to operate a global purchasing function. A secondary goal was to train and mentor an internal candidate to step into the newly-create vice president of purchasing position.

On the down side, if portable managers lack interpersonal skills, they can be viewed as interlopers, never earning the trust of coworkers or gaining their cooperation.

Sidebar:

PORTABLE COMPENSATION

Sidebar:

On the company side, it is important that project goals be spelled out. The interim assignment or project ought to be close-ended, typically lasting a year or less. Since the company is paying a premium for the use of the portable manager, all parties should be clear about the results the company anticipates.

Depending on the complexity of the assignment, companies usually base an interim manager's compensation on what they would pay a permanent manager in a similar position. In addition, they add a premium, perhaps 15 percent of base compensation, since the interim executive has down time between assignments and usually buys his or her own benefits. The company also pays the interim management firm that identifies and places the executive a fee that ranges from 30-50 percent. Success or completion bonuses often are used as incentives. The manager is not an employee, so the company faces no payroll taxes or fringe benefit costs.

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THIS IS THE FULL-TEXT.
GEOGRAPHIC NAMES: US

DESCRIPTORS: Managers; Outsourcing; Trends; Human capital; Workforce

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   planning
CLASSIFICATION CODES: 9190 (CN=United States); 2200 (CN=Managerial skills);
   5120 (CN=Purchasing); 6100 (CN=Human resource planning)
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14/9/47 (Item 30 from file: 15)
DIALOG(R)File 15:ABI/INFORM(R)

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Workforce 2020 conference summary
Lommel, Jane M
Chicago Fed Letter n140A (Special Issue Supplement) PP: 1-4 Apr 1999
ISSN: 0895-0164 JRNL CODE: CHF
DOC TYPE: Journal article LANGUAGE: English LENGTH: 4 Pages
WORD COUNT: 3015

ABSTRACT: US labor markets are extremely tight at present - tighter, at least, than for most of the past quarter century - and prospects are good that America will continue to face tight labor markets during the first quarter of the 21st century. On September 23-24, 1998, the Workforce 2020 Conference, conducted by the Hudson Institute, addressed a number of issues related to ongoing labor market tightness, including the impact on different regions, industries, occupations, skill levels and ethnic groups; the implications for future economic growth; and the types of policy actions that will enable communities to prosper in this environment. Some of the conference presentations are summarized.

TEXT: U.S. labor markets are extremely tight at present-tighter, at least, than for most of the past quarter century-and prospects are good that America will continue to face tight labor markets during the first quarter of the twentyfirst century. On September 23-24, 1998, the Workforce 2020 Conference, conducted by the Hudson Institute, addressed a number of issues related to ongoing labor market tightness, including the impact on different regions, industries, occupations, skill levels, and ethnic groups; the implications for future economic growth; and the types of policy actions that will enable communities to prosper in this environment. This Chicago Fed Letter summarizes some of the conference presentations.'

Future work force and jobs

Job growth has slowed and it will continue to do so, according to Howard Fullerton, U.S. Department of Labor. U.S. employment will increase-by 19 million jobs from 132 million to 151 million over 1996-2006, with a projected annual average rate of job growth of 1.3%. This compares with a gain of 21 million jobs in the previous decade,1986-96, and an annual average growth rate of 1.7%. The projected 14% change in employment is slower than the 19% increase attained during the ten years from 1986 to 1996.

Among the major occupational groups, growth may also differ from the past, resulting in a change in the structure of employment from 1996 to 2006. For example, average growth is projected to be higher for occupations requiring higher education (at least an associate's degree) than for occupations requiring less training, though some occupations requiring less formal education are also expected to have above-average growth.

How will labor force growth compare with job growth? The labor force, defined as individuals working or looking for work, is projected to increase by 15 million from 1996 to 2006, reaching 149 million in 2006. This 11% increase compares with a 14% increase over the previous ten years, when the labor force grew by 16 million. Fullerton noted that the total number of jobs is expected to grow significantly more than the labor force (19 million additional jobs versus 15 million additional workers) . Some of the shortfall will be offset by individual workers holding more than one job.

Part-time and contingent work

Max Lyons, Employment Policy Foundation, noted that a growing number of observers have been warning about "dramatic" and "unprecedented" changes in the nature of U.S. employment. These observers argue that employers are becoming increasingly likely to lay off full-time workers and hire contingent workers. However, considerable confusion exists about the size of this growing segment of the work force. That is because the category is often defined too expansively to include all part-time workers, temporary help, the self-employed, and contract workers. Such mistaken definitions arrive at estimates that contingent workers constitute at least 25% of the work force. Using a narrower definition, the U.S. Bureau of Labor Statistics recently reported that contingent workers constitute, at most, 4.9% of the work force. The treatment of part-time workers accounts for most of the difference in the estimates. Part-time workers constitute 18% of the work force. As defined by the Bureau of Labor Statistics, most parttime workers are not contingent workers because their jobs have lasted for at least a year and are expected to continue. Similarly, contingent workers are only a subset of self-employed workers. Thus, the inclusion of the self-employed in the count of contingent workers makes a big difference.

Entrepreneurship and the work force

Marilyn Kourilsky, Kauffman Center for Entrepreneurial Leadership, noted that the U.S. is in the midst of an entrepreneurial tidal wave. Kourilsky suggested that the nation will increasingly rely upon the lean and agile entrepreneurship of small businesses, which are already responsible for most recent new jobs, to fuel economic growth through employment opportunities and innovative goods and services.

Paralleling this trend is the growth of "intrapreneurship," which is employee application of entrepreneurial thinking and behaviors. Entrepreneurial development teams are applying this sort of thinking in many organizations to promote creativity and innovation.

Work force diversity

Anita U. Hattiangadi, Employment Policy Foundation, said that in today's increasingly tight labor markets, firms are paying more attention to the active recruitment of new workers to fill job openings. A recent survey of human resource executives found that 54% reported skilled labor shortages which they expected to continue into the future, and a Bureau of National Affairs survey showed that more than half of human resource executives listed recruitment among their departments' top three priorities for 1998. This increased emphasis on recruitment has created new employment opportunities for a broader group of job seekers, including many individuals from diverse ethnic and racial groups, women, older individuals, and those with limited skills and experience.

An outgrowth of employers' efforts to recruit an increasingly diverse work force is a growing "diversity training" industry that aims to create an environment in which workers' differences can positively affect productivity. Although the term diversity has traditionally referred to racial, ethnic, and gender differences, human resource professionals have extended the definition over time to include diversity in age, sexual orientation, and mental or physical abilities.

Immigration and the work force

George Borjas, Harvard University, addressed two fundamental questions: How many people do we want? And, which immigrants do we want?

What does the immigrant flow to the U.S. currently look like? While levels

of illegal immigrants are difficult to pin down, the U.S. has reached a historical high with regard to legal immigrants. Immigrants are disproportionally numerous among today's job seekers. About 8.4% of foreign-born noncitizens in the labor force were unemployed in 1997, compared with 4.3% of foreign-born citizens and 5.4% of the native born. One reason for this high proportion is that immigrants increasingly tend to be less skilled than native workers. Over recent decades, evidence shows that each wave of immigrants earns less than other workersfrom 16% less in 1970 to nearly 32% less in 1990.
How do immigrants affect native workers? The economic impact depends on whether incoming workers complement the native work force by taking jobs that native workers don't want or aren't qualified for or, on the other hand, act as substitutes for native labor, putting downward pressure on wages.

Immigration is highly skewed toward six states: New York, New Jersey, Illinois, Texas, Florida, and California. Even at that, the new wave of immigration is mostly a California phenomenon.

Despite this localized geography of initial impact, the economic effects of immigration eventually spill over onto the highly integrated national economy.

Immigration has considerably increased the supply of workers with less than a high school education in the U.S. labor market. In 1979 the typical skilled (native) worker in the U.S. made 30% more than the typical unskilled worker. By 1995, the pay gap was 41%. Contrary to the findings of other studies, Borjas's research suggests that 44% of the widening of the wage gap between skilled and unskilled native workers can be attributed to the impact of immigration on the supply of unskilled versus skilled workers.
Regional implications of labor trends

William A. Testa, Federal Reserve Bank of Chicago, discussed the implications of labor market tightness for a particular region, the Midwest (comprising the states of Illinois, Indiana, Michigan, Wisconsin, and Iowa) . Testa said that in the mid-1980s, when analysts forecasted slower work force growth and tighter labor markets nationally, such concerns seemed very remote in the Midwest because employment demand was weak in relation to work force availability. Yet by the late 1990s, labor market conditions had made an about-face in the region. Currently, Midwest unemployment is running more than one-half percentage point below the national average of about 4.3%. And business executives in the Midwest report "finding good help at current wage offers" as the most vexing of current problems. So, if today's tight labor markets continue, the region's policymakers and businesses must face up to the conditions associated with labor-constrained growth rather than underemployment.

From a demand-side perspective of the labor market, there are reasons to expect continued strong hiring plans among employers in the region. After a severe shock during the early 1980s, the region's mainstay industries seem to have regained profitability. Auto and truck production have not only regained competitive ability but have reconcentrated in the region, due to a complementarity between the changing organization of the industry, with its emphasis on just-in-time delivery, and the region's advantageous location and dense highway infrastructure. However, there are offsetting reasons that suggest labor demand may moderate somewhat in the Midwest relative to other regions. For one, the region's industry mix is concentrated in goods-producing industries-manufacturing and agriculture. These industries tend to shed labor or to experience slower growth in labor demand over time. Furthermore, the region's employment growth is highly procyclical with the U.S. economy and will tend to moderate along with U.S. economic growth. Finally, wages and incomes have revived in the region following the devastating shocks of the early 1980s. Market forces and rising wages are likely to moderate some of the demand for workers in the region.

Limitations on work force availability and supply would also indicate a future of slower work force growth. Much like other regions, the Midwest is likely to experience a tepid pace of entry of young adults into the work force. In addition, net migration of workers from other regions and immigration from other countries do not appear to be as significant in the Midwest as in many parts of the South and West. The robust work force growth of the past te-years has come about, to a significant extent, through reemployment of an underemployed population rather than through new workers.

If we are looking to an era of tight labor markets in the region, what should be done about it, if anything? The case for encouraging work force growth from outside the region is not unambiguous. While business and property owners clearly require an ample work force to ensure continued profits and rents, the gains for the region's workers are less clear cut. Tight labor markets are usually associated with rising real wages and incomes and with greater work force participation of indigenous workers. In contrast, competition for jobs from migrant workers can sometimes dampen wages. Nonetheless, overall work force growth can be desirable in other regards. In particular, growth may be needed to achieve sufficient work force and population sizes to sustain viable towns, cities, and industries. And as industries grow and prosper, opportunities for the region's workers will also grow.

Policies to boost labor supply from within the region may be less contentious than those that encourage inmigration. Most prominently, programs to enhance the effectiveness of public education and training can be considered. The high wage premiums that employers are placing on work force skills are the obvious benefit to be derived from achieving an efficient system of schooling. A less obvious bonus to work force availability are the higher participation rates or "employability" of the adult population that are attendant to greater years of schooling.

Policies and programs to bring workers and jobs together may also be deserving of further inspection. A muchstudied problem in large metropolitan areas is the geographic isolation of low-income workers from the suburban sites of emerging job opportunities. Policy alternatives include efforts to develop more affordable housing in outlying areas; to encourage job site location in older areas; to discourage discrimination in housing and lending; to provide better information about suburban job opportunities to those living in isolated areas; and to improve transportation to emerging job centers from low-income residential neighborhoods.

Interregional migration of workers

Michael J. Greenwood, University of Colorado at Boulder, discussed the unprecedented shift in regional population distribution that took place during the 1970s and 1980s. Between 1970 and 1980 the nation's population grew by 23.2 million people, from 203.3 million to 226.5 million. Of these, 20.9 million, or 90%, accrued to the South and West census regions. The previous historical high percentage of incremental national population accounted for by the South and West was 65% during the 1930s. During the 1960s these regions accounted for only 61% of incremental national population.

The 1980s saw a continuation of the regional population shift. The nation's population grew by 22.2 million during the 1980-90 period, with 89% of the incremental residents accruing to the South and West census regions. During the first half of the 1990s, the regional population shift slowed somewhat. Of an estimated 14.0 million incremental U.S. residents between 1990 and 1995, the South and West accounted for 80%.

Moreover, the situation in the Midwest changed dramatically. Incremental population was 2.7 times higher than it had been during the entire decade of the 1980s. On the other hand, population growth in the Northeast slowed considerably during the early 1990s.

A major theme of Greenwood's research is that because the baby boom has now largely matured out of the most mobile age classes, population and employment growth differentials that strongly favored the South and West will moderate in the near future. The moderating of the regional trend that began in the early 1990s will prevail, Greenwood argues, until the baby boom generation begins to retire in large numbers, probably around 2015.
Labor market intelligence systems K D. Nyegaard, Eriss Corporation, discussed the implementation of the ERISS labor market intelligence system in certain metropolitan areas of California, Texas, Florida, Ohio, and Indiana. The system is designed to supplement traditional sources, such as the U.S. Bureau of Labor Statistics, with more current and highly focused labor market intelligence available via Internet Web sites. Economic development professionals can exploit a database of salary levels, occupational classifications, and levels of available workers. Human resource departments have access to current wage data, as well as supply and demand information by occupation. Employers can conduct local area research on competitive wages, supply and demand pressures, and benefit offerings as an aid to more effective recruiting and retention.Job hunters can get a clear picture of the most up-to-date skill requirements and educational minimums for jobs they may be interested in. Placement firms, employment and welfare agencies, and career centers can use the system to direct qualified applicants toward high-demand occupations. The database also supports the efforts of economic development and local area business associations to attract employers to their community. The system is also being used by educators and parents to better educate children about local job opportunities and the fastestgrowing fields.

Discussion
In the words of one conference participant, "We cannot continue to talk about our competitiveness in the world without talking about our work force. We can't talk about our work force without talking about education. In turn, we can't talk about education without recognizing the serious shortcomings in the existing system. One of the conclusions, therefore, is that business must develop the will to change and improve the American educational system or the United States will not be able to compete successfully in a global marketplace."

Employers and educators also spoke about the need for more realistic, skills-based education that will continue throughout a person's career and the importance of putting more emphasis on performance than on credentials in the work environment.

Some participants pointed out that employers do not have good information about the costs of firing versus the costs of retraining workers in order to place them in other productive jobs within the organization. Such retraining might be particularly valuable for older employees, those with disabilities, and parents of young children who want to reenter the work force or work part time. The consensus was that employers need to explore retraining opportunities as an alternative to laying off workers.
Researchers at academic institutions also raised concerns about information needs. Cuts in the federal budget have significantly strained the resources of agencies that produce statistical information, in many cases causing them to cut back on regional studies. This is unfortunate because evidence for the success or failure of work force initiatives will emerge much sooner at the regional level than at the national level. There is also the issue of comparability and compatibility of data provided by different sources.

Participants suggested that the Hudson Institute's new Workforce Development Center should help state governments identify core problem

areas and develop appropriate strategies.2 In addition, participants highlighted the following new areas of research: developing curricula that will give students the skills, knowledge, and attitudes they need to succeed in the twentyfirst century; analyzing the skills gaps of older workers, particularly at lower income levels, to determine how they can be retrained for fast-growing occupations; changing the tax structure to encourage older workers to remain in the work force; analyzing how other countries attract and keep skilled workers, with a view to increasing immigration of skilled workers; and assessing the continuing impact of information technology on the global economy.
Footnote:

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Footnote:
1The Federal Reserve Bank of Chicago was a cosponsor of the conference. A conference proceedings volume will be available in spring 1999 from the Hudson Institute at 1-800-Hudson-0 or online at www.hudson.org

Footnote:

2The Hudson Institute's Web site, www.hudson.org, provides updates on the latest research in work force development and the best business practices in recruiting and retention.

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14/9/4 (Item 4 from file: 13)
DIALOG(R)File 13:BAMP

01128589 02050600 (THIS IS THE FULLTEXT)
Companies Must Tap Free-Agent Workforce
(Volume of free-agent workers in US has increased more than twofold since 1980)
HRFocus, v 76, n 7, p 5
July 1999
DOCUMENT TYPE: Newsletter ISSN: 1059-6038 (United States)
LANGUAGE: English RECORD TYPE: Fulltext
WORD COUNT: 193

TEXT:
The number of free-agent workers in the U.S. has more than doubled since 1980, with one in every five workers now classified outside the traditional labor force, according to a survey of 1,000 adults conducted by EPIC/MRA and sponsored by Kelly Services.

"By the year 2004, the number of free-agent workers should grow by another 11 million workers. I predict free agents will comprise nearly 50 percent of the general workforce in the next millennium," says Ed Sarpolus, vice president of EPIC/MRA.
"People want control of their careers, but they still want an employer. They need an 'agent' to them find jobs and manage the other human resource around being a free-agent worker," Sarpolus says.

Employers must be able to tap into this workforce if they want to have access to this talented group of employees, says Carl Camden, executive vice president, field operations, sales and marketing for Kelly Services. "Yet employers must understand that the free-agent workers have different needs and are motivated by different things than the traditional workforce."

According to the survey, these free-agent workers tend to be young, ambitious and seeking jobs that reflect their relatively extensive educational experience.

COMPANY DEPARTMENT NAME: Human Resources
CONCEPT TERMS: Human Resources; Independent contractor; Trends
GEOGRAPHIC NAMES: United States (USA)
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? t 14/9/8

14/9/8 (Item 8 from file: 13)
DIALOG(R)File 13:BAMP

01122562 01986032 (THIS IS THE FULLTEXT)
The New Deal at Work: Managing the Market-Driven Workforce
(Book offers analysis of how corporate restructuring is changing employee management; need for individuals to adapt to new work environments and for employers to secure skills and commitment from employees discussed)
Book Title: The New Deal at Work: Managing the Market-Driven Workforce
Article Author(s): Hansen, Fay
Book Author(s): Cappelli, Peter
Compensation & Benefits Review, v 31, n 3, p 61
May 1999
DOCUMENT TYPE: Journal; Book Review ISSN: 0886-3687 (United States)
LANGUAGE: English RECORD TYPE: Fulltext; Abstract
WORD COUNT: 553

ABSTRACT:
The book "The New Deal at Work: Managing the Market-Driven Workforce," by Peter Cappelli, provides an analysis on how the falloutof corporate restructuring changed the practice of employee management. It addresses both how individuals adapt to their new work arrangements as well as how employers secure the skills and commitment they need from employees. Cappelli raised an argument that since today's managers are working in an extraordinarily difficult environment, companies should find a way to motivate and extract more from the employees who can no longer be loyal to them. He also tried to explain how changes in the employment relationship affected compensation and wage structures and how companies are developing compensation programs to fit the new market-driven requirements. The "poaching problem" was also discussed in full detail and the effectiveness of compensation-based responses evaluated.

TEXT:
Peter Cappelli, Harvard Business School Press, Boston, MA, 1999, 320 pages, $29.95.

In his book, Peter Cappelli offers a detailed analysis of how the fallout from more than a decade of corporate restructuring is fundamentally changing the practice of employee management. Capelli, a professor of management and director of the Center for Human Resources at the Wharton School, addresses both how individuals need to adapt to their new work arrangements and how employers might secure the skills and commitment they need from employees even as their internal development programs are being reduced.

As companies abandon the elaborate employment systems that once protected their employees from outside market forces, they are replacing them with a system of market-based transactions such as contingent workforces, outsourcing for new skills, and compensation linked to organizational performance. Virtually every aspect of employment has changed now that the market governs this relationship, says Cappelli. "How organizations will function in the absence of employee commitment, with workers who have a more individualistic, short-term orientation, is a far-reaching question that raises serious concerns for employers and society as well," he writes.

Cappelli argues that today's managers are working in an extraordinarily difficult environment: Tight labor markets have created a war for talent at the same time that most companies are reducing their internal development programs. Companies need greater productivity and innovation to compete, yet managers must find a way to motivate and extract more from the employees who can no longer afford to be loyal to them. The book offers current examples of how some companies are adapting to these problems and making various alternative arrangements work successfully.

Throughout the book, Cappelli explains how the changes in the employment relationship have affected compensation and wage structures and how companies are developing new compensation programs to fit the new market-driven requirements. He also addresses the "poaching problem" and the means that companies ranging from SAS Software to Chi-Chi's restaurant chain have used to stem this growing trend. He also evaluates the effectiveness of golden handcuffs and other compensation-based responses to poaching and explores other approaches to employee retention.

One example in the book is SAS Software, which has held its annual turnover rate to about 4% in an industry where the average is about six times higher. And SAS does it despite paying compensation that is noticeably below the industry average. According to Cappelli, SAS's primary retention device is to provide employees with discounted prices for homesites as well as family-friendly benefits such as child care.

"Compensation," Cappelli writes, "can be an unpredictable mechanism for managing commitment." But it can be used to manipulate the time frame for employees so that they are more likely to stay when needed and to leave when necessary. Cappelli cites the example of consulting firms that are interested in attracting new blood and use partnership promotions to hold talent for about fifteen years of service. Then, many firms encourage turnover by making opportunities for promotion and major salary increases come very slowly.

One problem with golden handcuffs and other compensation programs designed to retain employees is that they are so easily copied by competitors that they cannot lead to long-term improvements in retention. Cappelli suggests that programs that create unique ties to the organization and cannot be duplicated easily elsewhere are better options for boosting retention.

COMPANY DEPARTMENT NAME: Human Resources
CONCEPT TERMS: Human Resources; Employee relations; Restructuring; Trends
GEOGRAPHIC NAMES: United States (USA)
?

THE NUMBERS

According to the Bureau of Labor Statistics, the fastest-growing category of jobs in the decade ending in 2006 will be in professional specialty occupations such as engineering and teaching, but the third-fastest-growing is in the low-skilled, low-paying "service occupations," such as kitchen workers and janitors.

Nontraditional work arrangements are on the rise, but they still account for only 12.5 percent of the work force. Adding in part-time workers does push that figure up to a quarter or more of the work force, but some experts don't think these should be lumped into the same category.
[National Journal, 9/4/99]

Right now, in the absence of clear legal precedent, or state or federal laws that can be consistently applied across the United States, companies still have the upper hand in an IT workplace that's increasingly dependent on short-term, contingent workers.

"What is being created in the high-tech field are more short-term, part- time workers-indies, freelancers, the self-employed," says Sara Horowitz, executive director of Working Today, a New York-based organization that advocates for 90,000 contingent workers-many in the IT industry.

"What we're saying is that there is no difference between the two types of workers ," says Horowitz, who testified recently before a joint Senate committee exploring economic development in Silicon Valley. "At the end of the year, both should have comparable salaries and benefits. It shouldn't matter if you're long or short-term, if you are essentially doing the same work as a full-time employee ."

Workers who negotiate alternative labor arrangements with employers are undeniably a significant part of the economy. The U.S. Bureau of Labor Statistics estimates that approximately 4.5 percent of the nation's workforce- roughly 25 million workers-are temp, contingent, part-time or contractual workers.

Although figures were not broken out for the IT industry, many believe IT freelancers comprise a sizeable percentage of the total.

Internet Week, 8/23/99

About 8.5 million Americans trade steady paychecks every year to work as free-lancers, independent consultants and independent contractors, according to 1997 U.S. Department of Labor statistics, the most recent figures available. [The News and Observer (Raleigh, NC)

August 22, 1999]

RECENT NEWS

The Ninth Circuit's decision last May ruled that long-term IT temps working at Microsoft's corporate offices for more than six months are common law employees and entitled to participate in Microsoft's stock option plan. The ruling did not address other issues, such as benefits.
Internet Week, 8/23/99

THE CHALLENGE

OUR POLICIES THAT ADDRESS THOSE CHALLENGES

THOUGHTS FOR EXPANSION OR REPACKAGING

ABOUT US

Company Information
Company Overview

Interim/Norrell Merger
Press Release
Corporate Fact Sheet
Range of Services
Services We Offer
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Creating an Emergent Culture
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What Employees Say
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Year 2000
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1999 Emerging Workforce Study

by Interim Services Inc.
in conjunction with Louis Harris & Associates, Inc.

In 1998 Interim benchmarked an emerging workforce dynamic – the existence of a new breed of employee whose workplace values and expectations are very different from what we've traditionally known. This new breed – the Emergent Workforce – crosses all age groups, gender and geography and, according to Interim, one of the world's largest employers, is a revolutionary trend that is quickly changing the way companies attract, retain and motivate talent.

As American companies continue to face the most challenging recruitment environment of the decade, the 1999 Emerging Workforce Study peers deeper into those workplace characteristics that attract top talent and motivate high performance amidst a changing workforce.

Where would you like to recruit your talent from? 29 million American workers or 100 million American workers?

It's no secret that the larger the recruitment source you have to choose from, the higher the probability is that you will find talented employees that fit your needs. So if the latter sounds like the place you want to be, you must become a preferred employer. And that means something different today than it did in the past. A significant number of employees today are embracing an Emergent attitude and looking for an employer who does the same. As a result, 100% of the American workforce is either equally satisfied or more satisfied working in an "Emergent company."

Conversely, the company that displays Traditional attitudes risks alienating a majority of the American workforce, remaining an equally attractive employer to only 29% of the workforce.

** According to US Census Bureau, there are 102,605,000 Americans employed 30 hours a week or more.*

Times are Changing:

New views on Loyalty, Career Path, Career Security . . .

EMERGENT EMPLOYEES	VALUES	TRADITIONAL EMPLOYEES
Defined as contribution	LOYALTY	Defined as tenure
Viewed as a vehicle for growth	JOB CHANGE	Viewed as damaging to one's career
Considered employee's responsibility to pursue	CAREER PATH	Considered company's responsibility to provide
Based on level of performance	ADVANCEMENT	Based on length of service
Rejected as a driver of commitment	JOB SECURITY	Required as a driver of commitment

The Emergent workforce's values differ sharply from what most managers may have been accustomed to in the past.

Emergent workers, overall, are more concerned with gaining new experiences and having opportunities for mentoring and growth. They feel more in control of their careers and want an employer that rewards them based on performance.

Traditional workers, in general, are more concerned with job security, stability and clear direction. They feel that an employer is responsible for providing a clear career path and in return, deserves an employee's long-term commitment.

Show Me the Numbers

AMONG WORKING AMERICANS THE STUDY MEASURED 22% AS EMERGENT, 29% AS TRADITIONAL AND 49% AS SHOWING MIXED VIEWS, WHICH INTERIM BELIEVES IS "MIGRATING" TOWARD EMERGENT.

Crossing Generations

Emergent views are not limited to Generation X, as some might expect. Just the opposite – the Emergent mindset has seeped into every generation, gender and geography, and is therefore expected to become the view of the majority, according to Interim. So what's gotten into everyone? The sobering realities of life after downsizing.

Interim believes that whether people personally lost a job or not, the downsizing of the '80s and '90s created a paradigm shift in the way people view their work life and manage their careers. Most aren't looking for 30 years of job security with a paternalistic organization. They are instead taking their careers into their own hands and focusing on opportunities for growth and development to ensure their own *career security.* This is fortunate for all of the lean, competitive companies that need skilled people. But it is also positive for a more liberated workforce that has created a host of new opportunities for itself. These include flex-time, contract and consulting job alternatives and even the existence of a "virtual office."

- **Fact: Emergent employees view job change as more positive and are more confident of their marketability.**
- **Fiction: Emergent employees are less loyal, job hoppers**

Wearing responsibility for their careers on their sleeves, Emergent workers are very conscious of making sure that their careers continue to progress. They also have more positive views about job change and are more confident about their marketability. But don't confuse these values with a lack of loyalty.

According to the Study, Emergent workers are just as loyal and have changed employers no more frequently than Traditional workers have. However, they define loyalty quite differently than Traditional employees do. Emergent employees equate loyalty with high performance - the level of contribution an employee makes to an organization - not tenure.

Bottom Line:

Provide a fulfilling work environment for Emergent workers and a company will have highly creative, rapidly growing employees with no greater risk of turnover.

"Job Hopping" at a Glance

Emergent employees historically have changed employers no more frequently than Traditional employees have – on average, both have worked for four different employers and have been in the workforce approximately the same length of time.

Loyalty at a Glance

88% of Emergent employees believe that loyalty is not related to the length of employment but rather to the level of contribution an employee makes to an organization.

94% of Traditional workers believe that loyalty is about the willingness to stay with an employer for the long haul.

Emergent environment key to recruitment, retention, satisfaction

An EMERGENT COMPANY is more likely to. . .

- View loyalty as contribution rather than tenure
- Have low tolerance for low performers
- Reward based on the level of performance rather than length of employment
- Expect employees to independently pursue career development

Can't please all the people all the time?

When it comes to the best environment for recruiting and maintaining today's talent, an Emergent culture is a sure win.

With the 1998 Emerging Workforce Study that benchmarked distinct sets of employee values, Interim theorized that Emergent employees would be happiest in Emergent environments and that the same would hold true for Traditional employees and Traditional environments. This year, the Study analyzed the issue of cultural fit and what it found was that when it comes to the best environment for recruiting and maintaining today's talent, an Emergent culture is an all-around win.

As you might imagine, Emergent employees working in Emergent environments report the highest levels of satisfaction with their work life and are unlikely to remain with a Traditional company. Migrating employees display similar tendencies, also preferring Emergent companies to Traditional ones. Somewhat less predictable, however, is the fact that Traditional employees are just as satisfied in Emergent environments as they are in Traditional environments.

Traditional employees in an Emergent workplace

Traditional employees appear to take "the middle of the road" when it comes to workplace expectations. In contrast, Emergent employees have a more definitive set of views on the workplace. Emergent employees require an Emergent workplace and have low tolerance for a Traditional workplace.

Work Environment

- While Traditional employees prefer a predictable job (56%), they also want opportunities for growth, even if stressful (66%).
- Emergent employees clearly favor high growth (89%), over predictability (27%).

Creativity

- While Traditional employees want day-to-day direction (93%), they also want to think creatively (96%).
- Emergent employees on the other hand, distinctly prefer creativity (98%) over daily direction (58%).

Job Security

- While Traditional employees believe companies are obligated to keep employees that "meet requirements" (38%), they also believe employees must grow and improve in order to keep their jobs (32%).
- Emergent employees clearly tend to believe job security is an employee's responsibility to earn (42%), rather than a company's obligation to provide (15%).

Emergent employees + Emergent companies = highest satisfaction

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When Emergent workers find a match with Emergent companies they rate diverse aspects of their work life as 20 - 30% more positive than those who are in Traditional companies.

	% E workers/E companies that positively rated	% E workers/T companies that positively rated
Job satisfaction	61%	33%
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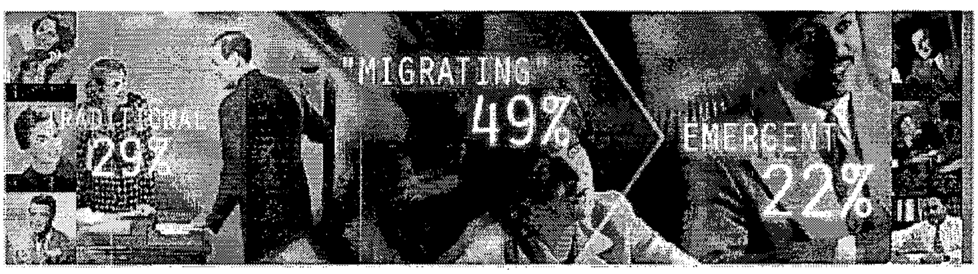

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The Free-Agent Workforce Has Grown To More Than 24 Million Workers

Study also shows there will be a dramatic rise in number of free-agent workers in the next five years

Troy, MI, March 15, 1999 -- Since 1980 the number of free-agent workers in the U.S. has more than doubled, with 1 in every 5 workers now classified outside the traditional labor force. Ed Sarpolus, vice president, EPIC/MRA, the Michigan firm that conducted the nationwide study, predicts, "By the year 2004, the number of free-agent workers should grow by another 11 million workers. I predict free-agents will comprise nearly 50 percent of the general workforce in the next millennium."

"This study also dispels one myth about free-agent workers - that they want to start their own business," continued Sarpolus. "The American dream is changing, but it's not taking the form of everyone wanting to be an entrepreneur. People want control of their careers, but they still want an employer. They need an "agent" to help them find jobs and manage the other human resource issues around being a free-agent worker."

The national workforce study, conducted by EPIC/MRA and sponsored by Kelly Services, was designed to develop a profile of the free-agent worker and will be followed up with additional studies to monitor their growth and develop new efforts to help these workers find jobs and develop new skills.

"The results of this study have tremendous implications for employees, employers and for labor policy in this country," said Carl Camden, executive vice president, field operations, sales and marketing for Kelly Services. "Employers must be able to tap into this workforce if they want to have access to this talented group of employees. Yet employers must understand that the free-agent workers have different needs and are motivated by different things than the traditional workforce."

"For employees, having the right skills, and continuing to build those skills is the key component of success in the free-agent market," continued Camden. "But the survey also shows that free agents, and those wanting to become free agents, have lots of company. There are millions of you out there, and millions more who want to join your ranks."

The study also uncovered that many of the barriers to free-agent work are centered around the inability of people to have easy access to health care. "Companies like Kelly see the need to develop creative benefit packages," said Sarpolis. "But individual company plans are not going to be enough. Some sort of universal health care, driven by the public or private sector, will be demanded for this huge, and growing, free-agent workforce as this population becomes a political force in this country. These people are highly educated, they have money, and they vote."

"This is the first survey ever to quantify the free-agent worker," Sarpolus continued. "This study points to a major shift in the nature of work in this country. I believe that the 'traditional' worker of the next millennium will be a free agent. And this will not just apply to technology experts. Managers, accountants, scientists, lawyers - whatever the profession - all these workers will embrace free-agency."

EPIC/MRA, founded in 1985 and based in Lansing, Michigan, is a full-service marketing research consulting firm that provides survey research and data analysis to state and local governments, foundations and non-profit organizations, businesses and associations.

Kelly Services, a Fortune 500 company, provides more than 800,000 employees annually in office services, accounting, engineering, information technology, legal, scientific, marketing, light industrial and home care. Kelly owns and operates more than 1,800 offices in 19 countries. Sales in 1998 were $4.1 billion.

This survey was conducted by telephone within the United States between December 6 and 15, 1998, among a nationwide cross section of 1,000 adults.

Results of the Survey

1. **Millions of today's workers are interested in becoming free-agents.**
   - Nearly 11 million workers are prepared to switch jobs and "definitely" enter the work force as a free-agent, if they are able to retain their level of pay and health care benefits without increasing their hours.
   - Forty-five percent of homemakers surveyed are interested in becoming free-agent workers.
   - Over 8 million senior citizens and retirees are willing to return to the workplace as free-agent workers.
   - Fifty-seven percent of all workers have considered non-traditional employment, including work as a free-agent.
   - Twenty-two percent of the full-time work force consists of free-agent workers.
   - The presence of free-agent workers in the workforce will expand in the future.

2. **Today's worker has reinvented the "American Dream."**
   - The "American Dream" is changing from owning your business to being your own boss. Being your own boss does not necessarily mean owning your own business.
   - This research dispels the myth that a large population exists within today's workforce that wants to run its own business.
   - People want control of their destiny, but they also want an employer.
3. **Who is this worker of the new millenium?**
   - The worker of the new millenium wants their job to reflect their educational experience.
   - The worker of the new millenium is educated. More than 70 percent of workers who will "definitely" become free-agents have completed college course work.
   - The worker of the new millennium is continuing their education to enhance their skills and advance their career.
   - This worker is young, ambitious and looking for control over their destiny. Many will find this freedom as free-agent workers.
   - Kelly offers opportunities for the worker of the new millenium, a member of a growing segment of the workforce.
4. **Many workers are seeking free-agent employment to escape current job restrictions.**
   - A large majority of future free-agent workers are dissatisfied with the restrictions of their current employment.
   - Free-agent workers are more focused on career advancement than on length of time spent with an employer.
5. **Professional workers are pursuing free-agent employment.**
   - Thirty-eight percent of workers who will become free-agents classify themselves as professionals.
   - The new free-agent worker will come from such fields as education, health care and computer programming.
6. **Midwest states take the lead for free-agent workers.**
   - The largest number of workers who will leave their jobs for free-agent employment will come from the Midwest.
7. **Employers are no longer loyal to employees.**
   - Today's worker does not feel a sense of job security.
   - Workers clearly feel that employers lack a sense of loyalty to their employees.
8. **Today's worker is willing to use an agency to find full-time employment.**
   - Twenty-eight percent of workers are interested in using the services of an employment agency to move into their next full-time position.
   - Kelly Services was identified as a leading company for providing such services.
9. **Kelly Services understands this new worker.**
   - Businesses today do not understand the new free-agent worker.
   - Kelly Services understands both business and the new worker. They are taking care of everyone, first as a free-agent representative offering the worker comparable or better wages, then as a resource for businesses that will ultimately pay less for the worker.
   - Kelly Services will continue to track this free-agent worker.

Additional Contact:, Martin J. Rome, (248) 244-4305,

Marty Rome will be happy to answer additional questions.

idc.com | networking & telecommunications | NT080299PR.htm

Work-at-Home and Online Households Will Fuel Emerging Markets for Communications Products and Services, IDC Says

Work-at-Home and Online Households Offer Attractive Demographics

August 2,1999 - Work-at-home and online households spend more on local and long distance services than other U.S. households and will fuel the growth of emerging broadband services and home networking solutions, as well as enhanced calling features like Internet call waiting in the coming year, according to International Data Corporation (IDC). The demographic profiles of the work-at-home and online segments indicate these consumer households are, on average, younger, more affluent, and better educated and typically exhibit higher-than-average telecom spending and awareness and interest in emerging communications services. New research based on IDC's *1999 U.S. Residential Telecommunications Survey* describes the potential business opportunities for communications service providers that offer services to the work-at-home and online consumer segments.

In 1999, 27.4% of all U.S. households reported conducting work from home in some capacity, either as telecommuters, corporate after-hours workers, or home-based business operators. "Each of these segments requires a set of unique communications services and has different financial resources," said Dana Thorat, research analyst with IDC's Residential Telecommunications Services program. "The corporate after-hours segment may seek extensions of sophisticated corporate communications services to extend their work day at home, while home-based business operators want to look more professional and not appear as though they operate a business out of their basement." Some employers may fund all or part of the communications expenses of after-hours households and telecommuters, while home-based business owners often keep a steady eye on their bottom lines when purchasing communications products and services.

Additionally, PC penetration and Internet access tend to be higher among work-at-home households when compared with average U.S. households. IDC's survey of a sample of U.S. households shows in 1999 slightly more than one-half of all households own a PC. Also, online penetration among U.S. households has risen to 30% - up from 25.5% last year. "Clearly, consumers are clamoring to get online, and right now the PC is the primary access device," said Amy Harris, research analyst with IDC's Residential Telecommunications Services program.

IDC's survey indicates PC and online households are more technologically savvy than average U.S. households - they are inclined to have more multiple PCs, multiple phone lines, and subscribe to more services such as call waiting and voice messaging. Moreover, based on current awareness and interest survey results, online households will likely be among the earliest adopters of emerging products and services such as high-speed Internet access, Internet call waiting, and home networking. "Emerging enhanced services that allow online households to integrate their online usage with other communications services will appeal to this consumer segment."

For its third annual *U.S. Residential Telecommunications Survey* (IDC #W19435), IDC conducted telephone interviews with 1,500 households in February and March 1999. Two research studies are now available based on this survey. The report, *Home Sweet Home: 1999 U.S. Residential Telecommunications Survey* (IDC #W19435), provides an overview of the survey results and survey data, which is available electronically. The bulletin, *Here Today, Home Tomorrow: A Profile of Work-at-Home Households* (IDC #W19557), segments work-at-home households as telecommuters, corporate after-hours, and self-employed at home and focuses on their specific adoption and spending trends for communications services and equipment as well as their interest in bundled and emerging communications services.

To order copies of the research studies, please contact Janis Dempsey at 1-800-343-4952 ext. 4145 or at jdempsey@idc.com.

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Ol fdsr
$19,000 basic access to all IDC reports
Arlene Clemens
703-280-5161

Home Sweet Home: 1999 U.S. Residential Telecommunications Survey

Amy Harris

Report #W19435 - July 1999

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Abstract

This report presents the results of IDC's third annual *U.S. Residential Telecommunications Survey*, a telephone survey of 1,500 U.S. households. The primary goals of this research are as follows:

· To determine the use of telecommunications services in the home: local and long distance spending patterns, carrier selection, usage of additional phone lines, dial-around long distance, and local number portability use

· To assess usage and interest in purchasing enhanced calling services, voice mail, and personal 800/888 services, as well as calling cards and prepaid calling cards

· To measure households' usage of directory assistance and toll-free numbers

· To evaluate the use of and interest in fax and answering machines, cordless phones, and modems in the home

· To assess households' current use of PCs: laptop versus desktop systems, personal digital assistants, and multiple PCs as well as use and interest in home networking capabilities and technologies

· To ascertain interest in online/Internet access, length of sessions, and key online applications (email, bulletin board/chat systems, software and audio/videoclip downloading, online shopping services, playing games, online banking and bill payment)

· To determine current use and interest in high-speed modem services such as ISDN, cable modem, DirecPC, and xDSL

· To measure the use of and interest in entertainment services such as cable and satellite TV, including premium cable services and pay-per-view

· To evaluate interest in emerging communications technologies such as videophones, voice over the Internet, Web TV, long distance calling using the Internet, and screen phones

· To determine usage and interest in integrated voice, video, and data services

· To understand the household penetration of vertical services such as caller ID and voice messaging, as well as interest in new services such as Internet call waiting and unified messaging

· To develop demographic profiles of the user segments, such as work-at-home households, those interested in high-speed Internet access, and vertical service users

· To profile U.S. households by regional Bell operating company (RBOC) region

· To examine U.S. household demographic characteristics such as age, education level, job function, ethnic origin, home ownership, marital status, presence and ages of children, type and place of residence, and income

The survey was conducted in February and March 1999. In addition to the data shown by all households surveyed, IDC has cross-tabulated the data in a variety of ways. Specifically, the results of the survey are presented in tables that include data cross-tabulated by RBOC region, region of the country, monthly phone spending, cable, satellite TV, online and Internet services, call management services, modem speed, high-speed services, home networking, number of phone lines, home computer ownership, long distance services, network devices interest, age, education, ethnic origin, home ownership, marital status, number of children, age of children in household, income, type of residence, area of residence, type of employment, work-at-home status, organization's primary business, professional level, and number of employees.

Because of the considerable amount of data, this report is presented as an executive summary with an electronic data file in spreadsheet format. This spreadsheet format makes it easy to search the database for information. Data is organized under the categories listed below:

· **Regional**

- RBOC region
- State/interstate region

· **Residential**

- Long distance spending
- Video services
- Online services
- Vertical services
- Long distance carrier
- Modem status and speed
- High-speed modem service
- Home networking
- Number of telephone lines
- Home PC status
- Long distance services
- Network devices

· **Demographics**

- Age
- Education

- Ethnic origin
- Home ownership
- Marital status
- Number of children
- Age of children
- Income
- Type of residence
- Area of residence

· **Work-related demographics**

- Employment
- Work at home
- Organization's primary business
- Professional level
- Number of employees

Topics: Internet Access Services, Calling Services, Internet, Internet Usage, Work-At-Home Market, Telecommuting, Telecommunications, Telecommunications Network Services, User Trends, Telecommuters, Online Households, Survey Data, Multiline Households
Vendors: No Companies Significant
Service(s): Residential Telecommunications Services

Home Sweet Home: 1999 U.S. Residential Telecommunications Survey

Amy Harris

Report #w19435 - July 1999

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IDC Reveals Home Office Internet Use Reaches Record High

Two-Thirds of Home Office PC Owners Now on Internet

FRAMINGHAM, Mass., Sept. 15, 1998 – Home office households with Internet access have reached record numbers, according to a new report from International Data Corporation (IDC) in Framingham, Mass. The report, *Home Offices on the Internet*, reports the number of home offices with Internet access has increased by over five million in the past 12 months to reach 17.5 million. This means home offices now account for 68 percent of all U.S. households currently on the Internet.

Home offices have continued to grow in number over the past year, with 37.7 million households supporting some form of home office activity. "Home office growth and increased PC penetration have set the stage for the Internet explosion," said Raymond Boggs, director of home office research for IDC. "Both home-based businesses and corporate home workers are turning to the Internet as never before."

Three critical applications will continue to drive home-office Internet use:

- **Communications**: E-mail today is what fax communication was ten years ago. Home-based businesses must have Internet access if they wish to be taken seriously by corporate customers. For after hours workers or telecommuters, e-mail is an especially important way to stay in touch with work colleagues.
- **Information Gathering**: Whether it's reviewing internal company documents or checking out competitors' Web sites, the Internet is now an important conduit to vital information for both home-based businesses and corporate home workers.
- **Electronic Commerce**: While e-commerce is only just beginning to be embraced by home-based businesses, home page intentions are high. The Internet is helping home businesses reach new customers and strengthen relations with current ones. As e-commerce capabilities grow both accessible and affordable, home-based business will make increasing use of Internet-based electronic transactions.

Growth of Home Office Internet Use

	1997	1998	Growth %
Home Office Households	34.7M	37.3M	7.5%
Home Office Households with PCs	22.0M	26.3M	19.5%
Home Office Households on the Internet	12.1M	17.5M	44.6%

Source: International Data Corporation, 1998

IDC's report, *Home Offices on the Internet*, is available for purchase by contacting Janis Dempsey at 800-343-4952. Reports can also be ordered on IDC's web site (http://www.idc.com). For additional information on IDC's Home Office continuous information research program, please contact Patrick Gorman at 508-935-4369 or via email (pgorman@idc.com).

About IDC

Headquartered in Framingham, Mass., International Data Corporation provides IT market research and consulting to more than 3,900 high-technology customers around the world. With a global network of 375 analysts in more than 40 countries, IDC is the industry's most comprehensive resource on worldwide IT markets, products, vendors, and geographies.

IDC/LINK, an IDC subsidiary, researches and analyzes the home computing market, leading-edge technologies in telecommunications and new media, and the convergence of computing and consumer electronics.

IDC's World Wide Web site (http://www.idc.com) contains additional company information and recent news releases, and offers full-text searching of recent research.

IDC is a division of International Data Group, the world's leading IT media, research, and exposition company.

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idc.com | market data & insights | consumer & small business research | CSB032299PR.htm

Internet Access Providers Should Prepare for Fierce Competition in the Home Office Market

By 2002, Home Offices Will Spend $10.5 Billion on Internet Access

FRAMINGHAM, Mass., March 22, 1999 - Home offices represent a quickly expanding opportunity for Internet access providers. A recent report from International Data Corporation (IDC) indicates that the number of U.S. home offices accessing the Internet will skyrocket from 19.7 million in 1999 to 30.2 million by 2002. During that same time, home offices' annual spending for Internet access will jump from $6.5 billion to $10.5 billion.

U.S. Home Offices with Personal Computers on the Internet, 1998-2002 (M)

1998	1999	2000	2001	2002
17.3	19.7	23.7	26.9	30.2

Source: International Data Corporation, 1999

IDC believes the increase of Internet use in home offices is a direct result of the expanding home office population, which is expected to near 50 million by 2002, and a jump in the number of home offices with PCs, which will approach 38 million in 2002.

"Just as home office growth has contributed to expanding Internet use, Internet availability has contributed to the growth and success of home offices," said Raymond Boggs, director of IDC's Home Office Market research program. "The Web enables a small business operating out of the home to establish a worldwide presence to promote itself and transact business online. It also allows employees who work at home to stay connected with offices and customers."

The types of activities home offices are performing online will require an increasing amount of bandwidth and incite fierce competition among those who can provide quick access. "The availability of high-speed Internet access is of special interest to home office households," Boggs said. "The applications they are most interested in, such as remote accessing of corporate data, collaborative working, and file sharing, are all bandwidth intensive."

Home workers can obtain high-speed Internet access with a variety of technologies, including analog modems with speeds of 56 kilobits per second, ISDN lines, xDSL, and cable modems. "Different technologies offer a variety of cost/performance benefits," Boggs said. "Given the size of the potential market, including both consumers in general and home offices in particular, the expected rewards for the technology winners will encourage vigorous competition between and within different product categories."

To appeal to the home office market, IDC recommends that product and service providers highlight the advantages of broadband communications rather than the technical details.

For the near term, IDC expects home offices seeking greater bandwidth to turn to 56K modems and ISDN. Today, 56K modems, which use ordinary phone lines, are the norm on new PCs and are generating interest among those with older modems looking to upgrade. Users find these modems attractive because they offer a higher speed than previous modem generations. However, they are much slower than broadband solutions. ISDN was the first broadband solution to reach consumers. It is just now starting to generate interest in home offices. However, it is a relatively high-cost solution for home offices, and it can't match the speed offered by the newer alternatives, cable modems and ADSL.

IDC believes that, long term, cable modems will be the most successful technology in the home office market, with ADSL also emerging as a formidable competitor.

Home Offices on the Internet (IDC #W18331) assesses Internet use in home offices and forecasts Internet use through 2002. It discusses the nature and frequency of Internet access and closely examines the strengths and weaknesses of Internet access technologies. To order a copy of the report, contact Janis Dempsey at 1-800-343-4952, ext. 4145 or at jdempsey@idc.com. Additional information on IDC can be found on its Web site at http://www.idc.com.

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Home Offices on the Internet

Amy Gilroy, Ray Boggs

Report #W18331 - March 1999

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Abstract
This report provides a comprehensive assessment of Internet use by income-generating and corporate home office households. In addition to forecasting changing home office Internet use through 2002, the report examines the relative strengths and weaknesses of different broadband technologies that will be used by home offices -- ISDN, ADSL, and cable modems -- as well as analog dial up through the new V.90 dialup modem standard. The nature and frequency of Internet access is examined along with interest in different Internet benefits and factors influencing growing use of different online services.

Topics:	Modems, ADSL, ISDN, Home Office, Cable Modem, Internet Service Provider (ISP), Internet, ISP, Corporate-After-Hours, PC, Income-Generating Home Offices, Corporate Home Offices
Vendors:	No Companies Significant
Service(s):	Home Office Market

IDC Expects Multiple PC Home Office Households to Reach 12.1 Million by 2002

Success of Home Networking Products Will Depend on Ease of Use

According to a new bulletin from International Data Corporation (IDC), the number of home office households with multiple PCs will soar from 7.8 million in 1998 to 12.1 million by 2002. This spectacular growth is creating enormous opportunities for vendors to connect these PCs.

IDC believes that Internet use in homes will ultimately be the application that drives widespread adoption of home networking solutions in multiple PC households.

As the importance of the Internet increases as a resource for news, finance, shopping, and education, multiple-PC-owning households will have to decide whether to ration use of the PC that has Internet access, subscribe to an additional telephone line and Internet account, or implement a solution that allows them to share Internet access between PCs.

"Most homeowners will find implementing a networking solution is the most cost-effective way to have two or more PCs in a home access the Internet," said Warren Childs, research manager with IDC's Home Office Market research program.

"These homes will not only reap the benefit of shared Internet access, but also all the other benefits of networking at home, such as peripheral sharing, file sharing, and e-mail."

Although networks established at the home will provide the same benefits as networks set up in offices, the types of networks in the home will look quite different from those set up at businesses.

"Networking products that will have broad appeal to home users must be simple, easy to install, and easy to maintain. Low price or high performance will not be able to overcome perceived or real difficulties with installation and maintenance of home networks," Childs said.

"The short-term success of home networks will depend upon ease-of-use issues. Not only will vendors have to convince prospective users that networks can be easily set up and run in the home, but prospective users will also rely on word-of-mouth experiences that the networks really are as easy to use as the vendors claim."

IDC believes that successful networking solutions will be those designed to enable applications beyond PC-to-PC applications, such as sharing Internet access in the home, home automation, and those that enable another TV to become a PC.

Networking vendors have focused on three areas of technology to bring networking into homes: phone line, power line, and wireless. According to Childs, phone line technology has the early momentum in home networking because of broad industry support and because products based on the technology already exist.

Electrical wiring's advantage is that it is accessible throughout a house. However, technical problems are inhibiting the success of this technology in the home networking market. Wireless offers the ultimate in flexibility and mobility in locating devices throughout the house, but high prices and the lack of standards-based products are hampering its home networking success.

Connecting PCs in the Home Office: Networking Market Forecast (IDC #B18320) focuses on current efforts to develop networks designed for residential PC-to-PC communication and to connect these networks to the Internet. Additional information on IDC can be found on its Web site at http://www.idc.com.

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CALL #	H11 .N3 no.239.
AUTHOR	Belous, Richard S.
TITLE	The contingent economy : the growth of the temporary, part-time and subcontracted workforce.
PUB INFO	Washington, D.C. : National Planning Association, 1989.
DESCRIPT	xiv, 121 p. ; 22 cm.
SERIES	NPA report ; 239.
SUBJECT	Labor supply -- United States.
ADD AUTHOR	National Planning Association.
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Work-at-Home and Online Households Will Fuel Emerging Markets for Communications Products and Services, IDC Says

Work-at-Home and Online Households Offer Attractive Demographics

August 2,1999 - Work-at-home and online households spend more on local and long distance services than other U.S. households and will fuel the growth of emerging broadband services and home networking solutions, as well as enhanced calling features like Internet call waiting in the coming year, according to International Data Corporation (IDC). The demographic profiles of the work-at-home and online segments indicate these consumer households are, on average, younger, more affluent, and better educated and typically exhibit higher-than-average telecom spending and awareness and interest in emerging communications services. New research based on IDC's *1999 U.S. Residential Telecommunications Survey* describes the potential business opportunities for communications service providers that offer services to the work-at-home and online consumer segments.

In 1999, 27.4% of all U.S. households reported conducting work from home in some capacity, either as telecommuters, corporate after-hours workers, or home-based business operators. "Each of these segments requires a set of unique communications services and has different financial resources," said Dana Thorat, research analyst with IDC's Residential Telecommunications Services program. "The corporate after-hours segment may seek extensions of sophisticated corporate communications services to extend their work day at home, while home-based business operators want to look more professional and not appear as though they operate a business out of their basement." Some employers may fund all or part of the communications expenses of after-hours households and telecommuters, while home-based business owners often keep a steady eye on their bottom lines when purchasing communications products and services.

Additionally, PC penetration and Internet access tend to be higher among work-at-home households when compared with average U.S. households. IDC's survey of a sample of U.S. households shows in 1999 slightly more than one-half of all households own a PC. Also, online penetration among U.S. households has risen to 30% - up from 25.5% last year. "Clearly, consumers are clamoring to get online, and right now the PC is the primary access device," said Amy Harris, research analyst with IDC's Residential Telecommunications Services program.

IDC's survey indicates PC and online households are more technologically savvy than average U.S. households - they are inclined to have more multiple PCs, multiple phone lines, and subscribe to more services such as call waiting and voice messaging. Moreover, based on current awareness and interest survey results, online households will likely be among the earliest adopters of emerging products and services such as high-speed Internet access, Internet call waiting, and home networking. "Emerging enhanced services that allow online households to integrate their online usage with other communications services will appeal to this consumer segment."

For its third annual *U.S. Residential Telecommunications Survey* (IDC #W19435), IDC conducted telephone interviews with 1,500 households in February and March 1999. Two research studies are now available based on this survey. The report, *Home Sweet Home: 1999 U.S. Residential Telecommunications Survey* (IDC #W19435), provides an overview of the survey results and survey data, which is available electronically. The bulletin, *Here Today, Home Tomorrow: A Profile of Work-at-Home Households* (IDC #W19557), segments work-at-home households as telecommuters, corporate after-hours, and self-employed at home and focuses on their specific adoption and spending trends for communications services and equipment as well as their interest in bundled and emerging communications services.

To order copies of the research studies, please contact Janis Dempsey at 1-800-343-4952 ext. 4145 or at jdempsey@idc.com.

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