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**HEALTH SCIENCE FACULTY EMPLOYEES' MORALE AND PERCEPTIONS  
AT THE TIME OF THE MERGER OF THE UNIVERSITY OF DURBAN –  
WESTVILLE AND THE UNIVERSITY OF NATAL.**

INSTITUTION UNIVERSITY OF KWAZULU- NATAL

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## **DECLARATION**

The work described in this dissertation was carried out in the Department of Public Health Medicine, Nelson R Mandela School of Medicine, University of Kwa-Zulu -Natal from January 2005 to December 2006.

The study represents original work by the author and has not been submitted, in any form, for any degree or diploma to any University. Where use has been made of the work of others, it has been duly acknowledged.

## **DEDICATION**

I dedicate this research report:

- To my most adorable son Kaylen who passed on, on the 28<sup>th</sup> October 2008. You are my light.
- To my Dad who passed on, on the 8<sup>th</sup> August 2009. You will always be remembered and we will always make you proud.

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Finally, I would like to take this opportunity to express my gratitude to my parents who gave me the wisdom and understanding of the importance of continuing education. It was with that thought that I persevered and completed this study.

## **ABBREVIATIONS**

CEO	Chief Executive Officer
HR	Human Resource
HRD	Human Resource Department
UDW	University of Durban - Westville
UKZN	University of KwaZulu-Natal
UN	University of Natal

## **SUMMARY**

### **Introduction:**

In December 2002, the Ministry of Education released its proposal, approved by cabinet, for the transformation and restructuring of the higher education system in South Africa. Evening out the differences between the historically white and the historically black institutions was the central motivation behind the South African government's restructuring plan for higher education. The restructuring and consolidation of the institutional landscape is a key element in the broader strategy for achieving the goals and objectives, namely, to ensure an equitable, sustainable and productive higher education system that will be of high quality and contribute effectively to the human resources, skills, knowledge and research needs of the country and which is consistent with non-sexist, non-racial and democratic values assigned in the constitution. (Ministry of Education, 2003).

Within higher education, mergers have been used to combine one or more institutions in order to create new entities. While some institutional mergers have caused major disruption and often considerable controversy, at the same time, many have achieved positive outcomes, especially in terms of building larger and more comprehensive institutions and increasing the range and quality of academic programmes.

Culture proves to be a critical component in understanding the process of planned change and transformation in universities. The significance of staff morale becomes particularly clear as we operationalize institutional transformation.

**Aim:**

The aim of the study is to examine the perceptions of staff in the Health Science Faculty at the two institutions, the University of Durban Westville and the University of Natal, concerning the impact of the merger on staff morale.

**Objectives:**

- a) To investigate the impact of the mergers on employees' morale.
- b) To investigate the perceptions of staff regarding working conditions, and academic standards between the two universities.
- c) To provide recommendations that would help facilitate merger processes.

**Methods:**

A cross sectional, descriptive study was undertaken in twenty eight departments of the previous University of Natal (UN) and seven departments of the previous University of Durban-Westville (UDW), in the Health Science Faculties. Within all the departments stratified random sampling was undertaken amongst academics, managers and administration staff. A semi structured anonymous questionnaire was used for data collection. The questionnaire included demographic information, employment status, personal concerns, reported physiological changes, human resource support, and perceptions about the advantages and disadvantages of the merger. Chi square and

independent t-tests were used for analysis of the data to test for the difference between the respondents from ex UDW and ex UN. Mean scores, p values and 95% confidence intervals were reported, for statistical significance  $p < 0.05$ .

### **Results:**

A total of 85 persons completed the questionnaires, of whom 61 (71.76%) were from ex University of Natal (UN) and 24 (28.2%) were from ex University of Durban Westville (UDW). Of the questionnaires, 27 were distributed to ex University of Durban Westville and 24 responded (response rate 88.8 %). Of the 152 questionnaires distributed to the ex University of Natal there were 61 respondents (response rate 40.0%). The total response of 85 resulted in a response rate of 47%. There were no statistical difference between ex UN and ex UDW by age group and sex (Chi square 6.65,  $p = 0.14$  and Chi square 2.12,  $p = 0.15$ , respectively). There were also no significant differences between the work categories and duration of employment (Chi square 3.44,  $p = 0.18$  and Chi square 4.19 and  $p = 0.38$  respectively). There were no statistically significant differences in personal reactions between ex UN and ex UDW respondents at the 95% level ( $p > 0.05$ ). There was a significant difference between the staff positions regarding communication about the merger, in that 13.6% of academics and 10.2% of managers, but only 3.4% of administration staff, felt that there was communication ( $p = 0.02$ ). Of the respondents, 71% were not informed about the progress of the merger, and hence did not feel part of the process, 90.6% considered the process was not well managed and 95.3% felt that more needed to be done to prepare staff for the merger. Respondents from both institutions provided similar responses to factors of concern although the respondents



from UDW were concerned about pay, this may be due to the fact that 45.8% of the respondents from UDW were administration staff as compared to 31.2% of UN respondents. Although the merger did affect the respondents in various ways it did not have a significant self reported physiological impact. The majority of the respondents remained positive about the merger and there were no institutional differences ( $p=0.53$ ). They also felt that the institution will benefit from the merger and they supported the merger, although they believed that insufficient attention had been paid to the problems concerning the merger.

**Conclusion:**

The main conclusion of the study was that respondents considered that the merger had been successful although there had been a lack of communication by management about what was happening. Management styles and initiatives needed to be more mindful of the staffs' psychological needs, the need for communication and the existing cultures of the two universities, to minimize possible cultural conflict and pay attention to developing loyalties, good morale and a sense of community within the newly created institution.

**Recommendations:**

Further research is required to assess the impact of post-merger and the lessons that can be learnt from the shortcomings.

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## **CHAPTER 1      INTRODUCTION**

### **1.1 RATIONALE FOR STUDY**

The adoption of the Constitution of the Republic of South Africa, 1996 (Act 108 of 1996) heralded a new phase in the structure and processes of the country's education system. For example in section 29 (1) (b), of the constitution, 1996 (Act 108 of 1996), it is stated that:

“Every one has the right: ...to further education, which the state, through reasonable measures, must make progressively available and accessible.”

In pursuit of the constitutional obligation towards the redressing of inequalities, the Ministry of Education developed a new landscape. Specifically, this initiative outlined the merger of universities and the removal of past forms of discrimination within further education. This action was a significant endeavour to transform the South African education sector (Department of Education, 1999).

Internationally, mergers are not a new phenomenon in higher education and there are examples of mergers going back at least to the late nineteenth century. But in recent years, with further moves towards massification, the development of large and costly public systems of higher education, increased pressures on government funding, and changes in academic work and its resource needs, mergers have become increasingly common (Robinson, 1977; Millett, 1976; Boberg, 1979; Locke, Pratt, and Burgess, 1985; Goedgeburre, 1989; Meek, 1991; Martin and Samuels, 1994; Temple and Whitchurch, 1994). Further, over the past three decades, governments in various industrialized countries have begun to use mergers as a key policy instrument in the major reconstruction of particular sectors of higher education, or of complete national systems, as well as a means to solve particular local problems (Goedgebuure, 1992).

Higher education systems and institutions have used institutional mergers to address a range of different problem, particularly for major restructuring and efforts to address problems of institutional fragmentation, lack of financial and academic viability, and low efficiency and quality (Harman, 2002). Mergers also have been used by individual institutions to address financial problems and external threats particularly those related to falling student demand and competition. Not surprisingly, mergers have been far more common in public higher education systems than in private higher education.

While there is no one prescribed method to ensure that mergers are managed successfully, there is much to be learned from the experiences of countries such as Australia where new higher education institutions were formed from a series of mergers over a decade ago (Harman, 2002 ).

While mergers as a policy issue in public higher education has attracted a great deal of scholarly interest over the last twenty years or so, little attention has been paid to mergers as a cultural issue (Harman, 2002). Given the impact of organizational culture on all aspects of organizational life, this is surprising.

Perhaps the cultural dimension has been vastly understated or ignored because of the elusive and hard-to-pin down nature of culture or because of the time needed for culture building and consolidation to occur in newly merged entities (Harman, 2002).

However, work that stresses the importance of culture includes that by:

1. Boone and Bowditch (1989), whose eight year study of five private company mergers focuses on the impact of the human and cultural elements of mergers during the post-merger period of organizations.

2. Pritchard (1993), who comments on the style of leadership needed for morale building and developing new loyalties.
3. Martin and Samuels (1994), who stress the importance in the post-merger phase of “consolidation and community building,” especially in institutions created from an amalgam of unequal, and
4. Norgard and Skodvin (2002), who in their study of a newly merged Norwegian college, emphasize the importance of culture’s influence on the attainment of academic and administrative goals.

## **1.2. BACKGROUND OF STUDY**

Prof. Kader Asmal, Minister of Education, reported that, in respect of restructuring of Higher Education in South Africa in 2003,

“The strategies for the transformation of the Higher Education System are at last in place, however much work still needs to be done to turn the system around. We must succeed in this challenging task if we are to meet the aspirations and hopes of future generations of South Africans” ([www.polity.org](http://www.polity.org): 2003 a).

South African Higher Education institutions are faced with the challenge of keeping up with the pace of political transformation as government implements its plan for the transformation and reconfiguration of the higher education system. The National Plan for Higher Education is the government’s blueprint for transforming the thirty six existing institutions with divergent missions, established on racial grounds, into twenty-one institutions with new institutional and organizational forms reflected in mission convergence and the creation of a new institutional type, termed the comprehensive institution.



Until now, democracy has not demanded a change in organizational behaviour. According to Professor GL Humphrey, Dean, Applied Natural Science and Engineering, Technikon SA, mergers are anticipated to produce successful transformation of institutions, through interventions at the root of organizational behaviour and by affecting institutional culture ([www.polity.org.za](http://www.polity.org.za):2003 a). He also suggests that mergers of higher education institutions can be seen as a mechanism for forcing strategic partnership between South Africa's racially developed institutions, to achieve optimal use of resources and satisfy human resource training and development needs for the country's social and economic development.

The launch of the National Plan for Higher Education in April 2001 provided details of the restructuring of the institutional landscape, through various strategies including regional collaboration and mergers. The anticipated benefits of these mergers include:

1. Removal of duplication in programme offerings and service provision.
2. Promotion of joint development and delivery of programmes.
3. Enhancement of responsiveness to local, national and regional needs.
4. Assisting with building academic and administrative capacity.
5. Refocusing and reshaping the institutional culture and mission of institutions.

The government aims to achieve its desired outcomes through alignment of institutional missions to the satisfaction of social and economic needs. The political agenda of transforming and reconstructing the Higher Education System involves:

1. Redress of past inequalities in order to achieve social justice.
2. Equitable access to, and success for, all South African citizens, particularly those from previously disadvantaged communities.

3. Lifelong learning opportunities.
4. Outcomes based education and training programmes.
5. Multiple access and exit points.
6. Institutional transformation to increase capacity and efficiency.

([www.polity.org.za](http://www.polity.org.za): 2003 a)

As a result of apartheid there were merger inequalities in South Africa (Department of Education, 1997; Reddy, 1998; Harman and Harman, 2003). The impact of the past is perceived via the cultures prevalent within these educational institutions. McShane and Travaglione (2005), argue that the original source of an organization's culture usually reflects the vision or mission of the organization's founders. However, the founder's vision may exhibit biases or establish the early culture by projecting an image of what the organization should be (Wilmott, 1992, Robbin, Bergman, Stagg, and Coulter, 2003). Against the backdrop of the challenges, which constraining organizational culture poses, this study utilizes empirical evidence obtained from the merger of ex UN and UDW, to explore the impact of organizational culture in the merger.

Given that each of the universities was administered under a separatist policy and the institutional capacity varied according to the dictates of the apartheid rule prevalent in South Africa prior to 1994 (Reddy, 1998), this study investigates the impact of organizational cultures on variables such as communication, behaviour, staff morale, perception of working conditions, standards and culture. Transformation is dependent on the shared values, attitudes and behaviour of people within the emerging institutions (Nahavandi and Malekzadeh, 1999, Balestracci, 2003, Alas and Vadi, 2004). Hence, those variables which are necessary for change are embedded in organizational culture, and

impact on facets such as equity and redressing imbalances in the workplace (Granell, 1998, Skodvin, 1999, Crain, 2000). Therefore in order to get a deeper insight into the dynamics of merger and transformation, an analysis of the culture prevalent in merging institutions has the potential to reveal the various values, attitudes, perceptions, morals and behaviours of those members undergoing change.

People within the merger process will ultimately drive the success of a change programme. Despite the initiative for transformation, it is understood that whilst the policy makers may set the agenda for change, the successful implementation of the process rests on the people within the merging organizations (Dackert, Paul, Sten-Olof and Curt, 2003). Furthermore, the individuals and groups functioning within these organizations own the culture, therefore, organizational culture can emerge either as a powerful support or a more compelling obstacle for organizational change. Nahavandi and Malekzadeh, (1999), assert that the organizations with strong, well-established corporate cultures find these to be a barrier to successful change. Although strong institutional cultures have a powerful influence throughout an organization, it can be a liability when shared values are not synchronized with those that will further the organization's effectiveness ( Granell, 1998, Skodvin, 1999, Crain, 2000). Consequently, in order for effective organizational improvements to occur after the merger process, an understanding of the cultural dynamics of academic institutions becomes imperative. Crain, (2000) recommends the commission of a cultural audit to determine the feasibility of meeting the desired objectives of the merger. Dacket et al., (2003), argue that the success of the integration process after a merger is critically dependent on how employees of merging organizations perceive the culture of the organizations involved and the expectations they have of the new organization. This assertion is supported by Wilmott, (1992), and Robbin et al., (2003).

Ultimately belief systems are derived from prevailing values, and, therefore, associated with the organizational culture.

People within the institutions exhibit different behaviours which ultimately impact on the change process (Kemp, 1994, Cartwright and Cooper, 1996, Dackert et al., 2003). Furthermore, it is suggested that the tensions in the dynamics of the merger process centre on factors such as risk, uncertainty, conflict and negotiation associated with change in any organization (Skodvin, 1999). This evidence is supported by international experiences, as reported by Skodvin, (1999). According to Skodvin (1999), evidence from the merger proposals in educational institutions in Sweden indicate that, in spite of the mergers being voluntary there were experiences associated with stress, fear and tension. Also, mergers within the Australian Higher Education domain were viewed by staff as threatening unique institutional strengths and traditions (Harman, 2000). In both instances the behaviours of people undergoing change were perfectly designed to fit past practices and values. Despite efforts to decrease the conflict and uncertainty, factors which are associated with transformation, it has often been noted that people undergoing the change process exhibit behaviours stemming from established values, perceptions, morale and beliefs (Balestracci, 2003).

A major obstacle facing change in South African institutions is parochial thinking. Frameworks have been entrenched by past institutional practices, and the challenge is moving towards equity and redressing of injustices within the educational sector (Department of Education, 1997; Reddy, 1998; Harman and Harman, 2003). A further challenge is the promotion of equal opportunities with a view to ensuring that staff and management reflect the wider demographic composition of South African society and that

these institutions respond to the demands of globalization. As a result, institutional culture becomes an increasingly important strategic issue that has to be confronted and managed appropriately (Granell, 1998). Underpinning the prevailing culture in different organizational settings is the impact of variables such as staff morale, perceptions and communication, and attitudes towards integration during the merger process.

### **1.3. HISTORY OF THE UNIVERSITY OF KWAZULU-NATAL (UKZN)**

The University of KwaZulu-Natal was formed on 1 January 2004 as the result of the merger between the University of Durban Westville and the University of Natal. The new university brings together the rich histories of both the former universities.

The total staff complement at UKZN in January 2004 was 5 659. This was made up of 2 192 academic staff and 3 467 support staff. Among academic staff, 47% were white, 28% Indian, 23% Africans and 2% Coloured. Of academic staff members 57% were male. Amongst support staff 36% were African, 34% Indian, 26% White and 4% Coloured. There is room for improvement although the university has the best academic staff equity in any South African university. In addition a sophisticated equity acceleration programme has been put in place.

#### **University of Durban-Westville (UDW)**

The University of Durban-Westville was established in the 1960s as a University College for Indians on Salisbury Island in Durban Bay. Student numbers initially in the 1960s were low as the result of the Congress Alliance's policy of shunning apartheid structures. This policy gave way in the 1980s to a strategy of "education under protest" which sought to transform apartheid institutions into sites of struggle. Student numbers grew rapidly, and in 1971 the College was granted university status. The following year, the newly named

University of Durban Westville moved into its modern campus in Westville and was the site of major anti apartheid struggles. UDW became an autonomous institution in 1984, opening to students of all races.

### **University of Natal (UN)**

Founded in 1910 as the Natal University College in Pietermaritzburg, the University of Natal was granted independent university status in 1949 owing to its rapid growth in numbers, its wide range of courses and its achievements in and opportunities for research. By that time it was already a multi-campus institution, having been extended to Durban after World War I. The distinctive Howard College building was opened in 1931, following a donation by Mr T B Davis whose son Howard Davis was killed during the battle of the Somme in World War I.

In 1946 the government approved a Faculty of Agriculture in Pietermaritzburg and, in 1950, a Medical School for African, Indian and Coloured students in Durban which was destined to produce doctors of international quality. The undergraduates were intellectuals who came from disparate backgrounds, united in adversity and motivated by their shared goals to become doctors of the highest quality, and practice their skill as equals in a free society. The corridors of the University's Faculty of Medicine became the hub of political activity, and the Alan Taylor residence at Wentworth, the target of many raids by the security police, provided an uneasy setting for the planning of subversive actions against the state. As a result the Medical School quickly became synonymous with the struggle against apartheid, and in time it became the gauge by which the intensity of the struggle was measured. Today the school is 57 years old and has survived despite controversy and political harassment, grossly inequitable state funding and a severe shortage of human

resources, facilities and equipment. It has emerged proudly with an international reputation for academic rigor and an unwavering commitment to the community it serves. During the 1960s many attempts were made by the government to either move or close down the school. This was unsuccessful, which is a fitting testimony to the resolve and the will to succeed which was the driving force of so many of those associated with the school over the years. On its 50<sup>th</sup> birthday the Medical School was named Nelson R Mandela School of Medicine to honor the world's most loved freedom fighter. ( [www.ukzn.ac.za](http://www.ukzn.ac.za) :2004 b).

The two KwaZulu-Natal universities were among the first batch of South African institutions to merge in 2004 in accordance with government's higher educational restructuring plans. Confirmed by the Cabinet decision in December 2002, the mergers are the culmination of wide ranging consultative processes on the restructuring of the higher education sector that began in the early 1990s. ( [www.ukzn.ac.za](http://www.ukzn.ac.za) : 2004 b).

#### **1.4. DEFINITIONS**

##### **Culture**

According to Global Environment Guide, (1999) culture can be defined as the complex whole which includes knowledge, beliefs, arts, laws, customs, and other capabilities acquired as members of society. "Culture is the way we do things around here". This definition reveals two important aspects. The 'we' says that culture is collective, as opposed to personality which is individual. It also suggests that different groups of people do things in different ways. The explanations of the term "culture" as given by various authors, state that culture is a people's way of doing things. It is their language, customs, values, beliefs, habits, norms, lifestyles, likes and dislikes (Harman, 1989).

Culture guides us how to think, behave and relate to other people. These explanations therefore relate to a dynamic state of affairs, meaning that culture is not static, but is constantly changing and is influenced by experiences and thoughts. Our cultural background influences the way we give, receive or perceive information. Culture is part of us, it is learned, shared, transmitted formally and informally, and integrated into people's lives.

### **Cultural diversity**

Cultural diversity refers to the variations and differences among and between cultural groups, depicted by their differences in behaviour, language, values, norms, beliefs and lifestyles. Diversity is where people operate in specific social structures, which are not homogeneous wholes but rather composed of multiple communities of culture (Parekh, 1992). In some countries diversity is defined as race, gender, age, parental status, education, geographic origins, professions, lifestyles, religion, position in the company and any other difference (O'Mara, 1994).

### **Merger and amalgamation**

An institutional merger is taken to mean an amalgamation of two or more separate institutions that surrender their legally and culturally independent identities in favour of a new joint identity under the control of a single governing body. All assets, liabilities and responsibilities of the former institutions, including the human elements, are transferred to the single new institution (Goedegebuure, 1992, and Pritchard, 1993). A merger can also be defined as the combination of two or more separate organizations, with overall management control coming under a single governing body and a single chief executive.



Normally all assets, liabilities and responsibilities of the former institutions are transferred to either a continuing institution or to a new institution (Harman, 2002).

### **1.5. PROBLEM STATEMENT**

While considerable research has been carried out in specific areas of higher education, it is only relatively recently that interest has turned to the exploration of areas such as the cultures of, and ethnographic studies of, institutional ‘underlife’ (Riseborough, 1993; Trowler, 1998).

As Milward so aptly puts it “To merge organizations without understanding cultural compatibility is to court disaster”. The task of integrating different corporate cultures can cause huge stress that is frequently manifested in terms of individual insecurity, unpredicted job losses and a downward spiral of morale (Milward, 2002 ). The long term sustainable performance of any organization depends upon effective teamwork, coordination of activity and the motivation, morale and general well-being of the workforce (Milward, 2002). Merging refers to an organizational change phenomenon and the different organizational cultures of the two organizations involved are part of the dynamics that impact on the success of the merger and staff morale. In measuring organizational culture before mergers it is also important to find out how adaptable both parties to the merger are. Adaptability is a crucial element if the merger is to succeed.

From the above it is evident that the actual ‘Problem Statement’ for this thesis is as follows:

The impact of the merger of the University of Natal and the University of Durban Westville on staff morale and the staff perceptions of the organization's readiness to change plays a major part in the success of the new institution.

### **1.6. AIM OF THE STUDY**

The aim of the study is to examine the perceptions of staff in the Health Science Faculty at the two institutions, the University of Durban Westville and the University of Natal, concerning the impact of the merger on staff morale

### **1.7. OBJECTIVES**

1. To investigate the impact of the merger on employees' morale.
2. To investigate the perceptions of the staff regarding working conditions, and academic standards between the two universities.
3. To provide recommendations that would help facilitate merger processes.

## **CHAPTER 2    LITERATURE REVIEW**

### **2.1. LITERATURE ON ORGANIZATIONAL CULTURE**

Major organizational restructuring, downsizing, mergers and acquisitions, and other workplace changes have been shown to impact negatively on individuals (Schweiger and de Nisi, 1991; Cartwright and Cooper, 1993; Bergin and Solman, 1995; Kets De Vries and Balazs, 1997; Trowler, 1998) resulting in increased job insecurity (Schweiger and Lee, 1993), higher levels of stress and uncertainty, reduced job satisfaction, trust and commitment, and the greater desire to leave the organization (Le Craw, 1992; Terry, Neilson and Perchard, 1993; Potts, 1997; Mishra and Spreitzer, 1998). Organizational restructuring in particular is likely to result in feelings of powerlessness by individuals to effect any improvement in their situation (Trowler, 1998). Rarely have decisions to restructure been reversed (Begley, 1998).

#### **Perceptions of working conditions**

Research evidence indicates that an unusually broad range of issues take on strategic significance in a merger and that organizational culture is critical to the successful integration of staff, students and other stakeholders within a newly combined higher education institution (Mayer, 1994).

Organizational culture has been described as “a make-or-break factor in the merger equation” (Fralicx and Bolster, 1997), and cultural incompatibility has been cited as contributing significantly to the success or failure of organizational reform (Cartwright and Cooper, 1993).

An organization's employees develop their workplace identity through the associations they have with coworkers, the nature of the work itself, their hierarchical status, the intrinsic and extrinsic rewards they receive, and the organizational culture to which they have adapted. As the "underlying glue" that binds an organization together, "culture conveys a sense of identity to employees" (Cameron and Quinn, 1998) that guides behaviour, provides stability and establishes boundaries (Freiberg and Freiberg, 1996). In fact, psychologists note that our fear of change is primarily rooted in the loss of such personal identity. "When a major change occurs, our internal dialogue sounds something like this: "I won't know how to act", "I won't fit, after this change, I won't be me anymore" (Bethel, 1990). From this perspective, significant work related events, such as mergers, can become a threat to a work-related-identity as a result of the likelihood that several aspects of the foundation of that identity might be seriously altered.

If mergers are constructed with little or no employee involvement and limited consideration of their cultural identity, it should not be surprising to find affected employees displaying signs of stress and anxiety as the identity undergoes change. Identity formation is so inherently a feature of one's employment that experiencing a significant alteration in the workplace can be as traumatic as experiencing a significant emotional event in one's personal life. Organizational culture provides an anchor that not only promotes individual identity, but also binds individuals together in collective unity. When the customary cultural context is threatened by merger with an unfamiliar culture, employees envision their workplace anchor symbolically drifting away, resulting in stress and anxiety. Providing an outlet for staff to express their concerns, phasing them gradually into the new workplace, and preserving at least some aspects of their prevailing cultural

identity all represent strategies that can offset such adverse reactions (Jeanne and Franciso, 2007).

The relationship between identification and organizational culture is crucial to understand when trying to discern acquisition success and failure. Strong cultures often produce highly identified employees, which may then lead to highly committed workers and concertive control (Barker, 1999; Tompkins and Cheney, 1983). Strong cultures are more difficult to merge, though, because the members of the merging organizations will be more heavily invested in those corporate values and, thus, more resistant to efforts aimed at replacing those guiding principles with a new set (Bullis, 1993). An important applied challenge for the successful management of acquisitions involves communicating managing-culture change so that an emergent culture is created without alienating either long-term employees or newcomers.

## **2.2 TYPES OF MERGERS**

Mergers may take a variety of different forms and, in turn, the particular form of any merger is likely to have a major influence on the characteristics of the merger process, the kinds of difficulties experienced, the type of organizational and governance structures likely to emerge, and the possibilities of success.

### **2.2.1 Voluntary and Involuntary mergers**

Voluntary mergers result from the initiative of the participating institutions themselves as opposed to springing from external pressures, particularly government. Generally voluntary mergers or institution-initiated mergers are far easier to organize and are more successful, largely because it is possible to achieve a substantial degree of staff

involvement in negotiations and implementation, leading to a strong sense of ownership. In South Africa, however the government has taken the view that voluntary mergers are unlikely to work effectively. Thus the cabinet has approved a national plan for mergers following extensive consultation with institutions and other stakeholders (Harman, 2002).

### **2.2.2 Consolidations and Take-overs**

Another important distinction is between two or more institutions of similar size coming together to form a new institution (a 'consolidation') as opposed to the 'take-over' of a small institution by a large institution. Consolidations generally take far more effort and time to organize, and involve difficult issues such as choice of the name for the new institution, how the 'Chief Executive' will be appointed, adoption of new academic and administrative structures, the portfolio of courses to be offered, and sometimes whether or not there will be substantial academic rationalization of courses.

Takeovers tend to be far simpler, with small institutions often being absorbed as departments or faculties into larger institutions, or integrated into existing structures. For political reasons, takeovers often are presented publicly as consolidations, in order to provide less pressure and a measure of face-saving on the part of smaller institutions being absorbed by larger institutions (Harman, 2002).

### **2.2.3 Single Sector and Cross-Sectoral Mergers**

Mergers may involve a combination of institutions from one higher education sector or they may involve institutions from different sectors. Cross sectoral mergers pose special problems, especially when sectors are well defined and often funded by different

mechanisms and when institutions from different sectors have distinctively different missions, roles and cultures (Harman and Robertson Cuninghame, 1995). Many researchers have been attracted to the study of cross-sectoral mergers, since they often produce higher levels of conflict and provide special opportunities to study academic and organizational culture (Harman, 2000).

#### **2.2.4 Two-Partner and Multi-Partner Mergers**

Two-partner mergers tend to be considerably different from multi-partner mergers in character and in how detailed organizational arrangements are handled. Sometimes small institutions work hard to attract additional partners into merger negotiations in order to avoid being 'swallowed-up' by a large institution.

#### **2.2.5 Similar and Different Academic Profile Mergers**

The range of academic disciplines included in mergers is another important variable. A useful distinction can be made between mergers of institutions offering courses in the same field or fields of study as opposed to mergers of institutions offering courses in different areas. Mergers of institutions with the same range of disciplines often mean greater commonality in academic culture but frequently major rationalization of course offerings will be necessary if cost saving and effective rationalization are to be achieved. On the other hand, mergers of institutions with different profiles can produce greater cultural conflict (Harman, 1989, and Harman, 2002) but often have the potential to result in more comprehensive institutions

## **2.3 ACADEMICS UNDER PRESSURE**

### **Impact of mergers on mental health and staff morale**

Ongoing changes within universities have had a deleterious effect on the productivity of academics, as well as on their health, well-being, and levels of stress and tension experienced (Hort and Oxley, 1992; Noble, 1994; Fisher, 1995; Abouserie, 1996; Hort, 1996; Trowler, 1998; Borg and Arpa, 2000; and Broadbent, 2000). The pressure emanating from the efforts of universities to cope with contemporary challenges has left academics with an increasing sense of insecurity (Taylor, 1997). Consequently, academics are suffering from identity crises, due firstly to the demands made upon them, secondly, the way these demands change, and finally the limited resources they have to meet those demands. Notions of collegiality, or cohesion and stability have been replaced by competition, disjuncture and never-ending change, leaving academics increasingly exhausted from 'change fatigue' (Rodger, 1998).

## **2.4 NEED FOR COMMUNICATION**

### **Personal reactions to the merger and its impact on mental health**

From relationships with co-workers to hierarchical status, mergers can be expected to substantially alter the workplace landscape. But perhaps no dimension of that alteration is as potent as the potential impact on organizational culture (Appelbaum, 1995).

Mergers can make employees feel uneasy because they are not at all sure whether their existing alignment with the pre-merger employer can be maintained or whether they will be able to find the right fit within the post-merger organizational culture. As with work-related identity, research indicates that intensive, ongoing communications between



management and employees can help to ease these uncertainties and address the concerns which they reflect (Appelbaum, 1995). In a period of organizational change, such as a merger, with high levels of anxiety, stress and damage to morale it would seem that 'culturally sensitive management' might prove to be critical to success. Otherwise people affected by the merger may be unable to make sense of the changes in policy direction as they occur, causing apprehension and disquiet (Cartwright and Cooper, 1996).

Although the early work on mergers and acquisitions focused primarily on financial aspects, merger and acquisition postmortems have identified human factors as increasingly salient. Mergers can have a traumatic effect on employees (Imberman, 1985). Hence maintaining employee morale during the integration process has been found to be one of the most essential factors contributing to the success of mergers and acquisitions (Gutknecht and Keys, 1993). Culture clashes, stressful reactions to uncertainty and change, and poorly managed conflict can result in "merger syndrome," which is one of the primary causes of the failure of mergers (Marks, 1997). Furthermore, factors that induce anxiety in managers during the integration phase of a merger can also negatively affect the outcome of a merger. These factors include uncertainty, lack of communication, and changes in the reporting relationships of employees (Crouch and Wirth, 1991).

When an acquisition occurs, numerous potential conflict catalysts result from the complex work adjustments and personal concerns that come with the integration of new ownership. Obviously, the financial consequences are potential sources of conflict. These may include layoffs, changes in reward systems, pay referents, and available resources. Employees' jobs may change, increasing workloads (Gutknecht and Keys, 1993) or requiring new reporting methods (Marks, 1997). How employees respond to these potential conflicts

shapes their behaviour during the integration phase. Employees can develop a very narrow focus of self-concern when faced with increased anxiety over these issues. This can cause them to withdraw from work during the integration phase as they try to cope with increased uncertainty or unwanted change (Siegenthaler and Brooke, 1999).

Effective leadership and management from the top are seen as the most important factors in assuring the success of a merger, the chief executive needs to perform a macro managerial role and must become the conceptualizer for the whole organization in terms of vision and assessing carefully the forces that will affect the destiny of the new institution. In this transformational role and in keeping with traditional academic culture, the chief executive of a newly merged institution would do well to put the human factor high on the agenda if the merged institution is to prosper in the post-merger period. This would involve consulting widely, empowering subordinates, delegating authority extensively and implementing strategies that will develop new loyalties, high morale and a sense of community within the newly created institution. This is a symbolic process of extreme importance to those affected by the merger (Harman, 2002).

Greater awareness and understanding of each institution's culture and subcultures can be used to minimize the likelihood and effect of cultural conflict and help to foster shared goals; culturally sensitive management can enhance the possibilities of positive cultural change. A sense of belonging can be fostered through, for example, cross-organization communication and the encouragement of collaboration. In a period of radical change, such as a merger, integration will include breaking down old loyalties and power structures that are working against the collective vision (Harman, 2002), as well as reaffirming, preserving and exchanging the distinctive traditions, legacies, values and aspirations of

existing cultures (Carlson, 1994). In addition to the work focused on social integration during the merge, mainstream human resource management techniques such as recruitment, induction, performance appraisal, staff development, reward, promotion and so on, should be closely aligned with the desired cultural value. Without these systemic changes, the merger risks improving and professionalizing the administration of the new merger at the expense of its academic development (Skodvin and Strensaker, 1998).

When personnel are well matched with a particular organizational culture, the stage is set for development of a reciprocal relationship that is mutually rewarding to both.

Over a period of time, workers and their employing organizations establish concurrent expectations, with each offering something that the other needs and each obtaining something of value from the other. Since it is a two way interaction, this implicit arrangement has been described as "reciprocation" (Levinson, 1976).

On the one hand, workers expect the employer to meet their needs for equitable compensation, career advancement, training, job security, self fulfillment, and the like. On the other hand, the employer likewise expects employees to fulfill their end of the implicit "bargain" by producing a satisfactory quality and quantity of work. This mutual reciprocity constitutes a 'psychological contract,' which can generate a feeling of betrayal if the contract is violated and expectations are not being met by either party (Levinson, 1976).

While unwritten and certainly not legally binding, the deeply implicit nature of a psychological contract shapes organizational behaviour in a powerful manner (Makin, et al., 1997).

If not managed effectively, mergers can be perceived by employees as a breach of this psychological contract. Even if they anticipate similar (not even improved) work-related

conditions and expect to find compatibility within the new organizational culture, the compulsory nature of mergers has a tendency to make employees feel helpless and vulnerable (Marks, 1997). Moreover, the very nature of change itself is psychologically threatening and physiologically stressful (Kotter, 1996; Kirkpatrick, 1985), whether it is in the addition of another new family member or the absorption of another agency.

## **2.5 UNDERSTANDING COPING**

Understandably, interest in coping in the workplace has been primarily aimed at reducing the impact of numerous work-related stressors such as role ambiguity, role conflict, and work demands (Carpenter, 1992; Latack and Havlovic, 1992; Callen, 1993; Leong, Furnham and Cooper, 1996) from the interactionist perspective (Cooper, Cooper and Eaker, 1998; Edwards and Cooper, 1990). Stress results due to lack of fit between environmental demands and individual needs, and the interrelatedness of both subjective and objective stressors is important. Yet most workplace intervention strategies focus on improving the ability of individuals to adapt to continuing environmental demands, the implicit assumption being that organizations are incapable or unwilling to modify the change process and, as a consequence, workplaces remain stressful. This then places the responsibility on individuals to strengthen their resolve and to either adapt to, or resist ongoing workplace stressors; far less attention is directed towards reshaping the environment to 'fit' the individual.

Coping is generally considered to be a dynamic, multifaceted construct comprising thoughts, feeling and actions that are used to deal with problems encountered in everyday life (Frydenberg, 1997). It is regularly used interchangeably with concepts such as

adaptation, mastery, defense or realistic problem-solving. This is reflected in the changed emphasis from a deficits or disability model of behaviour towards 'ability' models that focus on health and well-being, prevention and productivity, or are supportive of 'a quest for staying ahead and on top' (Taylor, 1997).

Drawing on the work of Lipshitz and Strauss, (1997), Taylor, (1997) suggests that the use of coping strategies is "learned in context" and personal values and identity feature strongly in the conceptualization of the ability to cope. Coping should be regarded as an interactive process that takes into consideration the characteristics of the individual, contextual issues, and the appraisal of the situation. Both the individual's perception of the demands of the environment and his or her perceived capability to respond to those demands are important in determining the effect of the stressor. Importantly, the identification of concerns of life experiences as stressors is dependent on individual interpretation and experience; "potential stressors only become real stresses when they are perceived as threatening" (Frydenberg, 1997). Of importance also, if the management of change is to be effective, is the recognition of the emotional stages individuals traverse in order to personally cope with change (Scott and Jaffe, 1989).

## **2.6. ORGANIZATIONAL CULTURE AS A VARIABLE**

The influence of culture in some merger situations is particularly powerful (Harman, 2002). While considerable attention has been paid to the role of governments and institutional leaders in mergers and policy and administrative issues, relatively little attention has been paid to the role of culture, especially when two or more institutional cultures are forced to become one. Attempting to create integrated and "coherent

educational communities” (Martin and Samuels; 1994; Harman, 2002) from the merging of cultures that are historically and symbolically non-complementary poses enormous challenges for higher education leaders. Even when institutions seem to be highly compatible and able to achieve profitable merger synergies, they often possess underlying cultural differences that can seriously impede integration (Boone and Bowditch, 1989; Norgard and Skodvin, 2002).

Central to both sociological and anthropological interpretations of culture are the notions of entrenched history, saga, myths, beliefs, loyalties, customs, and traditions which are trans generational, cumulative and symbolic. These cultural elements can be applied to both organizations and academia. Academic culture can be interpreted as historically transmitted patterns of meaning expressed in symbolic form through the shared commitments, values and standards of behaviour peculiar to members of the profession, as well as the traditions, myths, rituals, language and other forms of expressive symbolism that encompass academic life and work (Harman, 1989). In both organizations and academia, these cultural elements are deeply embedded, and the “thicker, the culture the more will be its influence” (Boone and Bowditch, 1989). In South Africa institutions at present this is particularly evident with regard to their socially differentiated racial history and tradition.

A particular cultural challenge for higher education leaders is to manage the merging of divergent campus cultures into coherent educational communities that display high levels of cultural integration and loyalty to the new institution.

## **2.7 CULTURES IN ORGANISATIONS**

### **Role of culture in personal reaction to the merger**

Culture is not something that is clearly and immediately apparent in an organization. Certainly its multiple manifestations are notable in everything from how employees communicate to what they wear and why they behave the way they do. But culture itself is a theoretical construct, only its outwards expression can be observed. As a result it is often ignored (Cameron and Quinn, 1998) or people are unaware of it. Unlike concrete codified policies and procedures, culture represents the unwritten “rules of the game”, the unspoken but widely shared assumptions that unobtrusively manipulate organizational members (Schein, 1992). It regulates behaviour informally on the basis of the precedent of established practices. In psychoanalytic terms, it can be symbolized as the “personality” of the organization, primarily reflecting the protective, self survival instincts of the identity, and the self preservation of the ego. Just as one’s personality strongly influences behaviour, so an organization’s culture defines and reinforces what is acceptable and unacceptable in the work environment (Stinchcomb et al., 2006). Culture is to organizations as personality is to people - a unique identity that sets one apart from all others. They have their own distinct culture that establishes their core identity, determining what values are upheld, norms are followed, and behaviours are expected (Cartwright and Cooper, 1993).

The work of Edgar Schein, a leading thinker about culture in organizations, focuses on this concept of the role of disparate cultures in the failure of organizational innovation. Schein defines organizational culture as “the pattern of basic assumptions that a given group has invented, discovered, or developed in learning how to cope with its problems of external

adaptation and internal integration and that have worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think and feel in relation to these problems” (Schein, 1992).

Teale, (1997) defines an organization’s climate as the reflection of how capable that organization is in dealing with conflict, motivation, and morale. For example, the climate is good if employees use channels of communication to resolve conflicts and have personal goals that match company goals. Both climate and culture are linked to the individual and group processes, the ethics of the organization and the way the organization manages change (Teale, 1997). Schein does not support the usual explanations of resistance to change, human nature and failure of leadership. He believes the reason innovations fail to survive is because particular cultures or communities of executives, engineers, and operators do not understand one another very well (Gellman, 1996).

The differences in the three communities of executives, engineers and operators make it easier to understand the lack of effective communication between them. Schein describes the *operator culture* as one based on human interaction and teamwork to accomplish work effectively. They are accustomed to using innovation to deal with unpredictable circumstances, and feel that rules and hierarchy often get in the way of these unpredicted conditions. The *engineering culture* consists of those individuals that know the basic design elements of the technology underlying the work of the organization and understand how that technology should be utilized. Schein sees this group as pragmatic perfectionists who are stimulated by puzzles and problems, preferring “people free” solutions. Finally, the *executive culture* consists of the assumptions that chief executive officers and their immediate subordinates share. They are preoccupied with maintaining an organization’s



financial health and, like the engineers, see people as impersonal resources that generate problems instead of solutions (Gellman, 1996).

Schein says: "To remain competitive, organizations must innovate in both the technical and organizational arenas. This kind of organizational learning requires not only invention of new forms but also their adoption and diffusion throughout the organization and to other organizations in the industry" (Schein, 1992)". He feels that organizations will not learn effectively until they are able to recognize and confront the implications of the three occupational cultures and discover that they use different languages and make different assumptions about what is important. Schein predicts that "organizational learning efforts will continue to fail unless each of these occupational cultures learns to treat the other as valid and normal" (Schein, 1992). From this perspective, it is not difficult to see why disparity leads to initiative failure within an organization, and it would seem almost impossible to successfully merge two organizations with disparate cultures.

Schein, however, points out that "in addition to the culture that arises within organizations, occupational cultures also generate cultures that cut across organizations" (Schein, 1992). These cultures would develop similar views based on a particular technology or skill. For example, academics working in different organizations would share similar outlooks about the nature of their work. This would also be true for other occupational cultures such as managers and chief executive officers. This theory would not seem to support the assumption that merging two universities would be any more difficult than a restructuring or redesign effort within one university.

Sherer, (1994) views corporate culture as an implicit phenomenon that is driven by unwritten policies and procedures, making it the most intangible element in the merger process. She maintains that because culture is difficult to identify and measure, employees come to understand it only after working in the organization for some time. Once the culture is learned, personnel know instinctively how to go ahead, how to stay out of trouble, what can, and cannot be tolerated, and how the hierarchy works in the organization.

Mergers that attempt to bring two different corporate cultures together pose a threat to the existence of the learned culture for both organizations. It has been suggested that, when this type of polarity exists, organizations should not attempt to merge completely, but work on more realistic types of culture neutral joint ventures (Sherer, 1994). When this third culture is developed, the desirable outcome would be to bring the best characteristics of both institutions into the new one. Schein would suggest, as previously mentioned, that these changes could be brought about only through the alignment among the occupational cultures of engineering, executives and operators.

Leveck and Joans, (1996) raise important questions in relation to the change that mergers may bring about. They suggest that organizational change is being viewed as an outcome rather than a means to achieve a desired outcome, and we must ask ourselves if the quality of teaching is being jeopardized in the process. Sherer, (1994) supports these concepts in her finding that mergers and acquisitions invite poor performance, often resulting in low staff morale and productivity, job dissatisfaction, and absenteeism.

According to researchers, these "employee problems" have been found to be the cause of half of all mergers' failures (Sherer, 1994). "Employee problems" could easily equate to

the perspective of Schein's engineers and executive outlook on people as impersonal resources that generate problems instead of solutions. Sherer's approach of improving a change process by simply spending time with and understanding people supports Schein's theory of recognizing and confronting the implications of the three occupational cultures (Gellman, 1996).

### **Management support during the merger**

One key recommendation in a study by Locke, (2007) was that senior management should commission a comprehensive cultural audit of the existing colleges, which would aim to understand the perceptions of the different groups and enable the institution collectively to agree to a mission and goals that reflect the needs and ambitions of a new university. The report argued that the traditional "due diligence investigation of the legal and financial circumstances of the two institutions needed to be supplemented by an analysis of the various organizational cultures and subcultures and the potential implications of the merger, the plans for the new merged institution, and the achievement /non achievements of the university status for the various staff groups". Taken together, these recommendations suggested an outline strategy for addressing the cultural issues raised by the proposed merger. Rather than developing a 'cultural strategy' that considered these issues separately from the management of the merger and the achievement of university status, a holistic approach was proposed that recognized the implications of existing cultural formations for developing management styles in the new university (Locke, 2007).

Hofstede, (1994) refers to standard psychological and social processes, which tend to accompany cross-cultural encounters. When someone comes into contact with another culture for the first time, there is usually euphoria then cultural shock. People usually

move through this to reach a new stable state, which may involve a neutral attitude. From his research Hofstede presented four dimensions of culture, namely:

a) Power distance index

This can be explained as the extent to which less powerful members in a institution accept that power is distributed unequally. The subordinates either reject or accept the autocratic approach and the emotional distance is large and this results in more emotions being involved.

b) Individualism versus collectivism

This is where individualistic or collective action is needed to deal with issues. Individualism, individual rather than group needs are stressed and the employee acts in his or her own self-interest. With collectivism, group needs are stressed.

c) Uncertainty avoidance

This is where human beings have to face the fact that we do not know what will happen tomorrow and that the future is uncertain. This creates extreme anxiety. Uncertainty avoidance is a by-product of power distance. Different members of society deal with this uncertainty differently.

This was followed by the work of Trompenaars and Hampder, (1997), which looked at seven variables to explain cultural differences and how they affect the process of doing business and managing in organizations in different parts of the world. These seven variables are divided into how we relate to other people, how we manage time, and how we relate to nature.

These variables are as follows:

a) Universalism versus particularism

A universalistic approach describes what is good and asserts that right always applies. In a particularistic culture attention is given to relationships and circumstances.

b) Individualism versus collectivism

Individuals are part of a group. The focus is on the community that is shared by the individual. Collectivist plans explain the needs and goals of an organization.

c) Neutral versus emotional

Should one's interactions be objective and detached or should one be emotionally attached to the situation?

d) Specific versus diffuse cultures

Here the whole person is involved in the project to get the business. Contact is personal.

e) Achievement versus ascription

Achievement is status that you have accomplished. Ascription is status acquired from birth.

f) Attitude to time and space

Different societies look at time differently. In some societies the past success is so important and in some the plans for the future are important.

g) Attitudes to environment

An important cultural difference is society's attitude to their environment. For some people their major focus is their internal values and for others, nature is their main focus.

This literature review has shown that during periods of radical organizational change, individuals are confronted with a multitude of new experiences and stresses that impact in varying degrees on their personal and professional lives. The manner in which individuals perceive, define and experience these changes will vary according to a number of factors, including the effectiveness of the strategies chosen to cope with such change.

The literature clearly shows that mergers may take a variety of different forms and, in turn, the particular form of any merger is likely to have a major influence on the characteristics of the merger process, the kinds of difficulties experienced, the type of organizational and governance structures likely to emerge, and the possibilities of success. It is clear that while considerable attention has been paid to the role of governments and institutional leaders in mergers and policy and administrative issues, relatively little attention has been paid to the role of culture, especially when two or more institutional cultures are forced to become one.

### **CHAPTER 3 METHODOLOGY**

The study used both quantitative and qualitative methodologies to guide the design and to develop the questionnaire. The quantitative method was used in section A and B of the questionnaire to gather demographic information and employment status respectively. This method was used to produce reliable, outcome data that is usually generalized to the wider population. It however does not have contextual detail and there are a limited range of responses. Section C, D, E, and F used both quantitative and qualitative methods to elicit rich, contextual data. The value of combining both methods in a single design was to allow each method to inform and reinforce the other. It also allowed the strengths of the one method to compensate for the limitations of the other in order to address the study objectives.

“While quantitative design helps us to understand behaviours, attitudes and perceptions, qualitative analysis answers questions about how respondents make sense of the situation. It can also address many objective dimensions of human actions and interactions, relating these finding to the contexts in which they occur. Furthermore, qualitative design is flexible, encouraging discovery and further investigation of the unexpected” (Ulin, Robinson, Trolley and McNeill, 2002).

Qualitative research is subjective and involves a detailed description of characteristics, cases and setting. This usually involves using observation, interviewing and documentation review to collect in-depth data, and the data collection process. On the other hand quantitative research is objective and examines phenomenon through the numerical representation of observation and statistical analysis which has resulted from a

structured data collection process. ([www.sigmasurveys.co.za](http://www.sigmasurveys.co.za): 2009). In qualitative research, the data collection and analysis phases tend to be less distinct than in quantitative research. The researcher who collects the data also codes the data, and conduct interactive analysis as the study proceeds. In qualitative surveys, participants can use the opportunity for their voices to be heard (Ulin, et al., 2002).

In this study both methods of data collection were employed, through the use of a semi-structured questionnaire (see Appendix A) that investigated the respondents' perceptions of organizational culture in the merger of the two universities.

### **3.1 STUDY DESIGN**

A cross sectional, descriptive study was undertaken.

#### **Study Site**

This study investigated the perceptions of the staff of the Health Science Faculty regarding the working conditions and culture in the two local universities (University of Durban Westville and University of Natal), involved in the merger which established the University of KwaZulu-Natal (UKZN). The recently merged UKZN, Faculty of Health Sciences was selected in light of the insights it could provide regarding transformation occurring more generally in South Africa. The Health Science Faculty in particular was selected since this will play an important role in the training of health professionals, a key component of social change in South Africa.



### **3.2 STUDY POPULATION**

#### Population Size

The University of Durban Westville had seven departments in the Health Science Faculty namely:

1. Dental therapy
2. Occupational Therapy
3. Optometry
4. Pharmacy and Pharmacology
5. Physiotherapy
6. Speech and Hearing Therapy
7. Sports Science

The staff complement comprised a total of 84 academic staff and 49 support staff

The latter including both managers and administration staff.

The University of Natal had twenty eight departments in the Health Science Faculty, namely:

1. Paediatrics and Child Health
2. Pathology
3. Physiology
4. Plastic and Reconstruction surgery
5. Psychiatry
6. Radiology
7. Radiotherapy and Oncology
8. Tele-health
9. Urology

10. Virology
11. Anaesthetics
12. Behavioural Medicine
13. Cardiothoracic Medicine
14. Chemical Pathology
15. Community Health
16. Dermatology
17. Family Medicine
18. Forensic Medicine
19. General Surgery
20. Haematology
21. Human Anatomy
22. Medical Microbiology
23. Medicine
24. Neurology
25. Obstetrics and gynaecology
26. Ophthalmology
27. Orthopaedic surgery
28. Nursing

The staff complement had a total of 364 academic staff and 393 support staff.

This study population comprised academics, managers and administration staff of the Faculty of Health Sciences at the previous University of Natal and the previous University of Durban-Westville, which together formed the New University of KwaZulu-Natal.

### **3.3 SELECTION OF STUDY SAMPLE**

The sample included the seven departments at the former University of Durban-Westville and the twenty-eight departments at the former University of Natal. Within all the departments stratified random sampling was undertaken amongst academic, managers and support staff.

The sample comprised 20% of the staff, selected to ensure representivity, and within each of the former universities a proportion of the staff in each of the departments was randomly selected. This number was selected to provide a sample of manageable size. Using probability proportional sampling the 20% sample as mentioned in Table 1 consisted of the following:

**TABLE 1** Selected sample from University of Durban-Westville and University of Natal

<b>Staffing at institutions prior to merger</b>	<b>University of Durban Westville (UDW)</b>	<b>University of Natal (UN)</b>	<b>Total</b>
<i>Departments</i>	7	28	35
Academic staff	17	73	90
Support staff and Managers	10	79	89
Total	27	152	179

#### **Exclusion Criteria**

Staff employed at either the former University of Durban - Westville or University of Natal for less than a year was excluded. A list of staff members was obtained once ethical

approval (appendix B) was obtained and stratified random sampling was used to allocate staff to the study. The stratified random sampling was undertaken using staff lists from the Human Resource Department.

### **3.4 STUDY INSTRUMENT**

Primary research was done using a semi structured questionnaire (see Appendix A) which was distributed to a sample of academics, managers and administration staff of the Health Science faculty of both the previous universities.

The study questionnaire was developed through information gathered from the literature review. The questionnaire comprised of six sections including demographic information, and further sought information about employment status, personal concerns and reported physiological changes, human resource support and perceptions about the merger.

The different sections of the questionnaire investigated the following:

- Section A      Demographic information
- Section B      Employment status
- Section C      Personal concerns
- Section D      Self reported physiological changes
- Section E      Human Resource support and
- Section F      Perception about advantages/disadvantages of the merger

In the semi structured questionnaire respondents were invited to explain in writing their responses to the last few sections. The first two sections comprised of demographic information which included age and sex. The respondent's employment status was investigated in respect of educational level, current position and whether this was a permanent appointment, the duration of employment, institution previously served (UN, UDW or other) and the current department where they were working. This information was required to categorize their responses.

Section C measured personal concerns. These were investigated through the use of a four dimensional Likert scale ranging from 1= not concerned, 2=less concerned, 3= concerned to 4= most concerned. Information was sought in respect of pay, benefits, and professional development (study opportunities, promotions and rationalization). Respondents were also asked about leadership of the university with regard to management of funds, academic standards, goals of the university, and quality of education. Other questions investigated concerns about discipline amongst employees, policies and procedures, and change in management, administration and structures. The study instrument also investigated concerns about increased workload, competition and job security, and weakness and strengths in the merger. Respondents were invited to explain their responses.

The fourth section of the questionnaire investigated physiological changes as a result of the merger. A four dimension Likert scale 1= no change, 2= slight increase, 3= increase and 4= dramatic increase, was used to measure perceived changes in lifestyles, lack of sleep, excitement at potential opportunities, changes in sick leave patterns, scope of self improvement, self confidence, depression and anxiety. Respondents were again invited to further explain their responses.

The next section investigated the communication and support respondents received in terms of the merger. The response was dichotomous, "yes" or "no". Respondents were

invited to answer questions, as to whether the institution provided a preview regarding the merger, whether there was open, regular and adequate communication, whether any support was received from management, and whether an employee assistance programme was offered. Other questions investigated whether respondents' were informed about the progress of the merger, whether they felt part of the merger, whether the merger process went well and if they had received HRD support. This section was used to identify possible shortcomings and provide information for the recommendations. Respondents were again invited to explain their response.

Section F investigated the respondents' perceptions about the advantages and disadvantages of the merger. A four dimension Likert scale, 1 = strongly agree, 2 = agree, 3 = disagree, and 4 = strongly disagree, was used to measure respondents' perceptions about the following; benefits from the merger, changes after the merger, support for the merger, advantages outweighing the disadvantages of the merger, and whether insufficient attention had been paid to problems concerning the merger. The respondents were asked about their perceptions as to the success of the merger, its importance to the respondents, whether its effect on them had been positive or negative and whether their expectations, (positive or negative) had been met. Further questions asked about the management style, perceptions whether the large institution would be successful nationally and internationally and if the timing of the merger would benefit the province. Respondents were again invited to explain their responses.

Results from the qualitative and quantitative data were then triangulated to provide a more comprehensive perspective of respondents' perceptions.

The final question asked whether the respondents' perceptions about this merger had changed in the past 18 months. The responses were "yes" or "no" and an explanation was requested.

### **Piloting of the study instrument**

The instrument was piloted at another tertiary institution where there had been a merger to check the clarity of the questions.

### **3.5 ADMINISTRATION OF QUESTIONNAIRES**

Questionnaires were sent out to participants, to be completed anonymously, with a self addressed envelope, and delivered via the internal mailing system. They were assured of confidentiality. They were given three to four weeks to respond by completing the questionnaire and placing it in the envelope provided, and the researcher arranged to collect it after a further two weeks. Non-respondents were contacted and given two weeks extension. The researcher then followed up again by visiting the departments to request that respondents complete the questionnaire. This improved the response rate.

### **3.6 ETHICAL CONSIDERATIONS**

Ethical clearance (see Appendix B) was obtained from the ethics committee of the Nelson R Mandela School of Medicine, University of Kwa-Zulu Natal. Permission to conduct the study in the two institutions was obtained from the management of each institution. A letter attached to the questionnaire (see Appendix D) described the purpose of the study and explained the procedures for completion of the questionnaire and confidentiality. Respondents were free to choose whether or not to answer the questionnaires. It was explained that a copy of the research report would be made available to all participants at the conclusion of the study, on request.

### **3.7 DATA MANAGEMENT**

The researcher delivered and collected the questionnaires in 2006. Confidentiality was maintained, since completed questionnaires were anonymous and was placed in self addressed envelopes that were provided and collected by the researcher. The researcher followed up on non-respondents by phoning and visiting the departments. The researcher kept all the questionnaires sent and then returned, in a locked cupboard.

The study used both quantitative and qualitative methodologies to guide a sampling design and to develop a sensitive data collection tool. Quantitative method was used in section A and B of the questionnaire to gather demographic information and employment status respectively. This method is used to produce hard factual reliable, outcome data that is usually generalized to the wider population. It lacks contextual detail and reflects a limited range of responses. Section C, D, E, and F used both quantitative and qualitative methods which elicits rich, contextual data. The value of combining the both methods in a single design was to allow each method to inform and reinforce the other. It also lets the strengths of one method compensate for the limitations of another to yield a more powerful methodology.

While quantitative design helps us to understand behaviours, attitudes and perceptions, qualitative analysis answers questions about how respondents make sense of the situation. It can also address many objective dimensions of human actions and interactions, relating these finding to the contexts in which they occur. Furthermore, qualitative design is flexible, encouraging discovery and further investigation of the unexpected (Ulin, Robinson, Trolley and McNeill, 2002).



Qualitative research is subjective and involves a detailed description of characteristics, cases and setting. This usually involves using observation, interviewing and documentation review to collect in-depth data, and the data collection process. On the other hand quantitative research is objective and examines phenomenon through the numerical representation of observation and statistical analysis which has resulted from a structured data collection process. ([www.sigmasurveys.co.za](http://www.sigmasurveys.co.za): 2009). In qualitative research, data collection and analysis phases tend to be less distinct than in quantitative research. The team members or the researcher who collect the data also code the data, conduct interactive analysis as they go along. In qualitative surveys, participants can use the opportunity for their voices to be heard (Ulin, et al., 2002).

In this study both methods of data collection were employed, through the use of a semi-structured questionnaire (see Appendix A) that investigated the respondents' perceptions of organizational culture in the merger of the two universities.

## **DATA ANALYSIS**

There were two different methods used for analyzing the data.

### **Qualitative data**

Open questions allowed respondents to express their feelings. These were analyzed using content analysis. The researcher read the explanations provided on three separate occasions to understand the different perspectives. The open questions were then analyzed, identifying themes, similarities and differences.

### **Quantitative data**

The quantitative questionnaires were entered and analyzed using SPSS statistical package version 13.5.

Descriptive statistics were used to describe and summarize the data. The demographic information was used to investigate differences between academic and support staff using Chi-square for categorized variables and if numbers were  $< 5$ , Fisher's Test was used. The Independent T- Test for continuous data was used for analysis of Likert scales to test for the differences in responses between the respondents from ex UDW and ex UN and mean scores, standard deviations and 95% confidence intervals are reported. For statistical significance  $p < 0.05$ .

## CHAPTER 4 RESULTS

### RESULTS OF STUDY

A total of 85 persons completed the questionnaire of whom n=61 (71.7%) were from ex University of Natal (UN) and n=24 (28.3%) were from ex University of Durban-Westville (UDW). Of the questionnaires, 27 were distributed to ex University of Durban-Westville and 24 responded (response rate 88.8%). Of the 152 questionnaire distributed to the ex University of Natal there were 61 respondents (response rate 40.0 %). The total response was 85 providing a response rate of 47.0 %.

The results of the study comparing responses on ex University of Natal and ex University of Durban-Westville respondents are presented. The results are reported in respect of the demographic profile of the respondents, and their perceptions about the merger. The results of the qualitative responses to the open ended questions are presented after the quantitative section.

### 4.1 PROFILES OF RESPONDENTS

**TABLE 2.** Age and sex profile. Number (%).

Age years	ex UN			ex UDW			Total
	Male	Female	Total	Male	Female	Total	
20-29	3 (3.53%)	7 (8.23%)	10 (11.76%)	2 (2.35%)	7 (8.23%)	9 (10.58%)	19 (22.35%)
30-39	1 (1.18%)	8 (9.41%)	9 (10.59%)	1 (1.18%)	2 (2.35%)	3 (3.53%)	12 (14.12%)
40-49	6 (7.06%)	9 (10.59%)	15 (17.65%)	3 (3.53%)	4 (4.71%)	7 (8.23%)	22 (25.88%)
50-59	16 (18.82%)	6 (7.06%)	22 (25.88%)	2 (2.35%)	3 (3.53%)	5 (5.88%)	27 (31.76%)
60-69	5 (5.88%)	(0.0%)	5 (5.88%)	(0.0%)	(0.0%)	(0.0%)	5 (5.88%)
<b>Total</b>	<b>31 (36.47%)</b>	<b>30 (35.29%)</b>	<b>61 (71.76%)</b>	<b>8 (9.41%)</b>	<b>16 (18.82%)</b>	<b>24 (28.2%)</b>	<b>85 (100%)</b>

n = 85

As indicated in table 2 the majority of participants, consisting of similar numbers of men and women, were from ex UN. Under a third (28.2%) of the sample was from ex UDW, where there was twice the number of female respondents. Thus, in total there was a higher proportion of female respondents. Almost a third of respondents were in the age group 50-59 years and over a quarter were between the ages of 40-49 years. A quarter of the respondents from ex UN were in the age group 50-59, and among the ex UDW respondents, a higher proportion of respondents were in the 20-29 age group. There were no statistically significant differences between ex UN and ex UDW age groups (Chi square 6.65,  $p=0.14$ ) The difference between UN and UDW across sex was also not statistically different (Chi square 2.12,  $p= 0.15$  )

**TABLE 3.** Comparison of respondents' work categories. Number (%)

Work category	Respondents			Chi square	P value
	UN	UDW	Total		
Academic	23 (37.7%)	10 (41.7%)	33 (38.8%)	3.44	0.18
Manager	19 (31.0%)	3 (12.5%)	22 (25.9%)		
Administration	19 (31.1%)	11 (45.8%)	30 (35.3%)		
Total	61 (100%)	24 (100%)	85 (100%)		

n= 85

As indicated in table 3 the majority of respondents (38.8%) were academics, followed by 35.3% who were in administration and 25.9% were at the manager level. There were no significant differences between the work categories of ex UN and ex UDW respondents. ( $p=0.18$ )

**TABLE 4.** Duration of employment of ex UN and ex UDW respondents. Number (%)

Duration of Employment in years	Respondents			Chi square	P value
	UN	UDW	Total		
1-5	7 (11.5%)	4 (16.7%)	11 (12.9%)	4.19	0.38
6-10	8 (13.1%)	7 (29.2%)	15 (17.7%)		
11-15	21 (34.4%)	6 (25.0%)	27 (31.8%)		
16-20	20 (32.8%)	5 (20.9%)	25 (29.5%)		
Over 20 years	5 (8.2%)	2 (8.4%)	7 (8.3%)		
Total	61 (100%)	24 (100%)	85 (100%)		

n= 85

Table 4 shows that overall almost a third (31.8%) of respondents had worked in the institution between 11-15 years, however, the highest proportion of respondents from UDW had worked between 6-10 years (29.2%), and in UN 34.4 % had worked between 11-15 years. There were no statistically significant differences between the respondents for the duration of employment from the different institutions. (p=0.38)

**TABLE 5.** Comparison of respondents' highest educational level per institution.

Number (%)

Highest educational level	Respondents			Chi square	p value
	UN	UDW	Total		
Matriculation	15 (24.6%)	7 (29.2%)	22 (25.9%)	7.75	0.17
Diploma	4 (6.6%)	4 (16.7%)	8 (9.5%)		
Degree	5 (8.2%)	1 (4.2%)	6 (7.1%)		
Masters	8 (13.1%)	4 (16.7%)	12 (14.1%)		
Doctorate	6 (9.9%)	5 (20.9%)	11 (13.0%)		
Professor	23 (37.7%)	3 (12.5%)	26 (30.6%)		
Total	61 100%	24 (100%)	85 (100%)		

n=85

As indicated in table 5 within the UN sample, the highest percentage of respondents was at the professorial level, (37.7%) followed by 24.6% whose highest qualification was matric. Within UDW, for more respondents matric was the highest level of education (29.2%) followed by 20.8% with doctorates. The differences were not statistically significant with  $p = 0.17$ .

## 4.2 REPORTED IMPACT OF MERGERS ON EMPLOYEES' MORALE

**TABLE 6** Comparison of impact of the merger on respondents' work perceptions and concerns.

Factors of concerns			t value	p value
	UN	UDW		
	Mean score, SD (95% CI)	Mean score, SD (95% CI)		
Concerned about pay	1.03 (0.18) (0.99 - 1.08)	1.22 (0.42) (1.04 - 1.40)	-2.82	0.01*
Concerned about benefits	1.02 (0.13) (0.98 - 1.05)	1.21 (0.42) (1.04 - 1.40)	-3.26	<0.005
Increased competition	1.18 (0.39) (1.08 - 1.28)	1.25 (0.44) (1.07 - 1.46)	-0.68	0.50
Quality of education	1.39 (0.49) (1.26 - 1.51)	1.42 (0.50) (1.22 - 1.65)	-0.19	0.85
Increased work Pressure	1.39 (0.49) (1.26 - 1.51)	1.33 (0.48) (1.14 - 1.56)	0.51	0.61
Increased workload	1.43 (0.50) (1.29 - 1.55)	1.33 (0.48) (1.14 - 1.56)	0.78	0.44
Job security	1.43 (0.80) (1.21 - 1.63)	1.21 (0.59) (0.96 - 1.48)	-2.82	0.23
Study opportunities	1.57 (0.50) (1.44 - 1.70)	1.50 (0.51) (1.26 - 1.70)	0.61	0.54
Promotions	1.62 (0.49) (1.49 - 1.74)	1.46 (0.51) (1.22 - 1.65)	1.38	0.17

n= 85, \* significant at 0.05 level

Scale: 1 = not concerned, 2 = less important concern, 3 = concerned and 4 = most concerned

Employees from the two institutions provided similar responses for most factors of concern that were investigated.

There was a statistically significant difference in the mean score for "Concerned about Pay" benefits between UDW and UN. The mean scores indicate that although both UN and UDW displayed little concern regarding pay, the UN staff were significantly less likely to be concerned than UDW administration employees.

Similarly a significant difference in the mean score for "Concerned about Benefits" between UDW and UN, was found ( $p < 0.005$ ), the mean values indicating UN respondents were significantly less concerned about benefits.

Respondents were not particularly concerned about increased competition but there was more concern about the quality of education offered in the new institution and the increased work pressure being experienced by staff. Job security was the third most important factor at ex UN but there were no statistically significant difference between the institutions for this.

There were also no statistically significant differences in respect of the other factors of concern, however, respondents indicated more concern about promotions and study opportunities at both institutions.



**TABLE 7** Comparison of respondents on physiological health related aspects personal reactions to the merger

Physiological health related aspects	Personal Reactions		t value	p value
	UN	UDW		
	Mean score, SD (95%CI)	Mean score, SD (95%CI)		
Excitement at potential opportunities	1.31 (0.79) (1.11 - 1.51)	1.08 (0.41) (0.91 - 1.26)	1.35	0.18
Scope for self improvement	1.31 (0.85) (1.09 - 1.53)	1.00-(0.00) (0.0 – 0.0)	1.79	0.08
Depression	1.20 (0.63) (1.04 - 1.36)	1.04 (0.20) (0.96 - 1.13)	1.18	0.24
Changes in lifestyle	1.08 (0.42) (0.97 - 1.19)	1.08 (0.41) (0.91 - 1.26)	-0.01	0.99
Changes in sick leave pattern	1.08 (0.38) (0.99 - 1.18)	1.00- (0.00) (0.0 – 0.0)	1.06	0.29
Lack of sleep	1.03 (0.18) (0.99 - 1.08)	1.04 (0.20) (0.96 - 1.13)	-0.21	0.84
Your self confidence	1.03 (0.26) (0.97 - 1.10)	1.00 (0.00) (0.0 – 0.0)	0.62	0.53
Anxiety	1.03 (0.26) (0.97 - 1.10)	1.08- (0.41) (0.91 - 1.26)	-0.69	0.49

Scale 1= no change, 2= slight change, 3= increased and 4 = dramatic change

Table 7 reports on the respondents' experience of stress, anxiety and uncertainty regarding the merger, as over-stress can cause physical as well as mental health problems.

Respondents at both institutions indicated that their personal responses to working conditions resulting from the merger had not resulted in changes to their lifestyle, or their sleep or sick leave patterns. The ex UN respondents reported a higher score for perceived depression (but the score was still very low), but also the highest scores for the positive aspects such as excitement at potential opportunities and scope for self improvement.

There were fewer fluctuations in the scores of the ex UDW respondents, mean scores ranged from 1.00-1.08, for the different variables but they did not see any change in the scope for self improvement and, although this was not statistically significant, there was a trend towards differences between them and the ex UN respondents ( $P= 0.08$ ).

The merger did not result in a significant physiological self reported impact between respondents from the two universities, although respondents at the ex UN reported higher scores for the positive reactions, "excitement" and "scope for self improvement" and also for "depression", but lower scores for "anxiety". There were however no statistically significant differences in personal reactions between UN and UDW respondents at the 95% level ( $p>0.05$ ). Thus the impact on employees' morale did not differ significantly between ex UN and ex UDW employees' regarding their personal reactions to the merger, except in respect of pay and benefits. UDW employees were more concerned about salary and benefits as a result of the merger.

### 4.3 RESPONDENTS' PERCEPTIONS ABOUT THE MERGER

**TABLE 8** Comparison of respondents' perceptions about the merger

Perceptions	Respondents		t value	p value
	UN	UDW		
	Mean score, SD (95% CI)	Mean score, SD (95% CI)		
Do you think that insufficient attention has been paid to problems concerning the merger?	2.27 (0.77) (1.94 - 2.26)	2.10 (0.37) (1.93 - 2.33)	0.68	0.50
Do you think that the institution will benefit from the merger?	2.04 (0.64) (1.78 - 2.05)	1.80 (0.42) (1.60 - 1.96)	1.10	0.28
Do you think that the advantages of the merger outweigh the disadvantages?	1.96 (0.64) (1.72 - 1.98)	1.90 (0.57) (1.82 - 2.18)	0.24	0.81
Do you support the merger?	1.78 (0.43) (1.62 - 1.85)	1.80 (0.43) (1.80 - 2.12)	-0.11	0.91
Do you think the larger institution will be more successful locally	1.64 (0.85) (1.41 - 1.79)	1.50 (0.53) (1.28 - 1.85)	0.47	0.64
Do you think the larger institution will be more successful internationally	1.64 (0.85) (1.4 - 1.77)	1.60 (0.67) (1.3 - 1.92)	0.12	0.91

n=85

Scale 1=strongly agree, 2= agree, 3= disagree 4= strongly disagree

There were no significant differences amongst the staff from UN and UDW ( $p > 0.05$ ). The majority of respondents thought that the larger institution would be more successful both

locally and internationally and they supported the merger. However although the majority of the respondents felt that the institution will benefit from the merger, there was concern that insufficient attention had been paid to the problems concerning the merger.

Responses to the open ended questions indicated that although commitment to the concept of a new university was generally quite strong, the organizational changes had resulted in considerable alienation for some, and a feeling of no longer belonging to the organization. This had contributed to a significant reduction in motivation, as well as the lack of self efficacy in being able to contribute to the ongoing life of the organization, as expressed by a respondent, "Overall the impact has been a loss of a sense of belonging or being part of the institution. I don't feel that I am part of it nor a part of what is going on anymore. I no longer know whom to contact. If people don't feel they belong to anything then they won't contribute to it."

The changes overall appear to have been beneficial to staff but the frustration level also appeared to have increased. The need to attend to many differing tasks within the same time period had produced a situation where "things compete against each other". This had produced a feeling of "just getting there when the work is done it is fine, but sometimes I would like to be further ahead than I am."

**TABLE 9.** Comparison of respondents' perceptions of working procedures, culture differences and standards.

Perceptions of			t value	p value
	UN	UDW		
	Mean score, SD (95% CI)	Mean score, SD (95% CI)		
<b>Working Procedures</b>				
Change in procedures	2.72 (0.97) (2.48 - 2.98)	2.46 (0.89) (2.09 - 2.83)	1.15	0.25
Changes in management policies	2.30 (1.01) (2.04 - 2.56)	2.25 (0.95) (1.85 - 2.65)	0.19	0.85
Changes in administration	2.02 (0.97) (1.76 - 2.27)	1.96 (0.91) (1.57 - 2.34)	0.25	0.80
Changes in structures	1.98 (1.05) (1.71 - 2.25)	1.83 (0.87) (1.47 - 2.20)	0.63	0.53
Promotions	1.62 (0.49) (1.49 - 1.74)	1.46 (0.51) (1.24 - 1.67)	1.38	0.17
Increased workload	1.43 (0.50) (1.29 - 1.55)	1.33 (0.49) (1.13 - 1.54)	0.78	0.44
Job security	1.43 (0.80) (1.21 - 1.63)	1.21 (0.59) (0.96 - 1.46)	1.20	0.23
<b>Standards</b>				
Students academic standards	2.21-(1.01) (1.93 - 2.50)	1.79- (0.94) (1.40 - 2.19)	1.66	0.10
Funds available	1.92 (0.86) (1.69 - 2.14)	1.67 (0.92) (1.28 - 2.05)	1.19	0.24
Study opportunities	1.57 (0.50) (1.44 - 1.70)	1.50 (0.51) (1.28 - 1.72)	0.61	0.54

Increased Pressure	1.39 (0.50) (1.26 - 1.51)	1.33 (0.48) (1.13 - 1.54)	0.51	0.61
Increased Competition	1.18 (0.39) (1.08 - 1.28)	1.25 (0.44) (1.06 - 1.44)	-0.68	0.50
Quality of Education	1.39 (0.50) (1.26 - 1.51)	1.42 (0.50) (1.20 - 1.63)	-0.19	0.85
Goals of University	2.11 (1.04) (1.85 - 2.39)	1.75 (0.90) (1.37 - 2.13)	1.52	0.13
Rationalization	2.05(1.07) (1.77 - 2.33)	1.88 (1.08) (1.42 - 2.33)	0.67	0.50
<b>Culture</b>				
Discipline amongst employees	2.20(1.24) (1.88 - 2.52)	2.08 (0.98) (1.67 - 2.49)	0.40	0.69

n=85

*Scale 1 = not concerned, 2 = less important concerns, 3 = concerned, 4 = most concerned*

There were no statistically significant differences as regards concerns affecting the respondents from the two institutions. On the contrary many of the concerns were similar regardless of which institution respondents came from, as the following sections show.

### **Working Procedures**

The most important concern for the staff at both former institutions was in respect of policies and procedures, followed by changes in management. Respondents expressed their concerns about the change in policies that in their opinion were not thought through carefully and all relevant stakeholders were not consulted. They also expressed their concern about the top down approach from management. They felt that there was a need for policy change and styles in management, but that it had to be done systemically and after careful negotiation. Staff at ex UN appeared to perceive more concern (mean scores

>2 for seven of the items) than ex UDW (mean scores >2 for three of the items) but neither group's concerns extended to means scores of 3 or 4, (of high concern), suggesting that most staff were satisfied. They were also not concerned about job security, increased workload, pressure or competition.

The increase in institutional status brought about by the changes saw some academics experience a sudden rise in professional status and position, which allowed them greater input and control over the organizational direction and change. This provided an effective 'cushioning' effect against the impact of the changes enabling these academics to remain somewhat more positive than others, even though their working hours were much longer.

Respondents indicated surprisingly little concern about the impact of the merger in respect of pay and benefits but were more concerned about the increased workload, job security and pressure.

### **Standards**

Staff were not concerned that the merger would affect the quality of education provided nor their own study opportunities. The majority of the respondents accepted that the change in administration and structure was to be expected in any merger and thus they were not too concerned about this.

Respondents were divided in their perceptions about promotions. Some felt that they benefited from the merger while others felt that they will not grow in their profession because of equity considerations.

The respondents made several additional comments with regard to the benefits for individuals in the new dispensation. Several respondents felt that they would be able to apply their skills and experience at different levels, lecturing to a variety of students with

different qualifications. Most respondents felt that the merger would create improved infrastructure, resources and facilities for staff and students. Some respondents hoped that greater opportunities for promotions would exist but felt that the criteria according to which staff members were promoted in their departments were not fair. One of the additional comments made was that a respondent hoped that greater opportunities would exist in the new institution, as he/she had never been promoted in his/her ten years at UN.

Further analysis of the responses to the open-ended questions identified the following themes. Although some staff complained of feeling exhausted and burnt out, others remained positive despite the difficulties experienced in the workplace. Internally motivated, these respondents utilized opportunities that arose in order to gain more control over their workplace environment through the adoption of numerous strategies including individual goal setting. As a result, they believed they had grown professionally from their experiences; for example they had, of necessity, become more organized, utilized technology to facilitate learning more than previously, and had improved their administrative skills. By actively participating in the changes rather than fighting them, these respondents had been able to increase their repertoire of behaviours, and this had produced a feeling of being more able to control the emotional tension, despite of an unstable work climate, and this had facilitated more control over the work environment.

### **Culture**

A strong belief in the impact and need for individual change to facilitate change at a more general level was evident in the response of one individual, who advocated that change is about self change rather than changing others or the institution, and that this is an essential element if the organization is to move forward. He further explains that "if one continues



to grow, the University continues to grow, if you stop growing the University begins to die". "The people who suddenly feel they are on top, that they don't have to grow, that they can tell other people what to do, are finished, As far as I'm concerned the University is going backwards from that moment". This philosophy toward change and the ability to remain enthusiastic about the future assisted this respondent to cope with the less than ideal experiences of the past, as illustrated in the comments "things were decided from on high without consultation, but we strive towards the future". The acceptance that change is essential for individual growth, no matter one's age, is clearly evident in the words of this respondent: "I am not the same person today as I was last year, I would say I have changed radically, the older I become the more sure I am of myself".

For a small group of mainly senior academics, the change created little disruption, especially those who were ideally placed in positions of influence and control over the direction of the change. Others believed that their success in coping with the changes resulted from their ability to "work harder and smarter" and as a consequence, the higher energy normally required to cope with the changes was able to be channeled more productively into assisting those who were struggling. By assuming the role of mentor or nurturer to others, these academics fulfilled an essential role, as highlighted by a respondent:

"The personal impact has been the necessity to work much harder. There is also the need to somehow stop the troops from mutinying, reminding them of their positive achievements and at the same time watching they don't overload themselves in the interests of the institution but not themselves".

The organizational culture within both institutions supported the change but perceived it to be a top-down approach with insufficient communication. Despite this the majority of staff viewed the merger positively.

#### **4.4 NEED FOR COMMUNICATION ABOUT THE MERGER**

**TABLE 10.** Comparison of the communication between institution and respondents about the merger. Number (%)

<b>Did your institution communicate openly with you?</b>	<b>Respondents</b>			<b>Chi-square</b>	<b>P value</b>
	<b>UN</b>	<b>UDW</b>	<b>Total</b>		
Yes	18 (29.51%)	5 (20.83%)	24 (27.06%)	0.657	0.418
No	43 (70.49%)	19 (79.17%)	61 (72.94%)		
Total	61 (100.0%)	24 (100.0%)	85 (100.0%)		

n=85

The majority of respondents (over 70%) did not feel that there had been open communication about the merger from the institution. The organizational culture within the two institutions did not appear to differ and there was no statistically significant difference between the views of respondents at the two different institutions regarding communication (p=0.42).

**TABLE 11.** Comparison of reported communication to different categories of staff in the institution. Number (%)

Did your institution communicate openly with you?	Respondents				Chi square	p value
	Academic	Manager	Administration	Total		
Yes	12 (13.6%)	9 (10.2%)	3 (3.4%)	24 (27.3%)	7.57	0.023*
No	21 (25.0%)	13 (15.9%)	27 (31.8%)	61 (72.7%)		
Total	33 (38.6%)	22 (26.1%)	30 (35.2%)	85 (100.0%)		

n=85 \*significant at 0.05 level

There was a significant difference between the staff positions regarding communication in that 13.6% of academics and 10.2% of managers, but only 3.4% of administration staff felt that there had been communication ( $p=0.02$ ).

In the response to the open-ended questions respondents reported that they experienced the pressure of the merger and that the need for support was paramount, yet the provision of greater assistance by management was not forthcoming. The concern that insufficient information had been provided regarding the need for change and the progress regarding the merger left many respondents feeling that they were just being told to change. The pressure on the academics to cope with the demands made upon them did not correspond,

some argued, to the amount of training available to assist and build confidence in them attempting to participate in the changes.

Some respondents looked to colleagues for support, and this had proved to be a great source of comfort and had assisted them to cope. This, it was argued, was a stark contrast to the level or lack of support offered to them by the management of the University. A far more user friendly-approach was required, some argued, and a model of organization that was more supportive and addressed people's insecurities generated by the changes.

**TABLE 12.** Difference in perception about communication according to type of job and previous institution. Number ( %)

Did your institution communicate openly with you?	Academics				Chi square	P value
		UN	UDW	Total		
Yes	9 (39.13%)	3 (30.0%)	12 (36.36%)	0.613	0.710	
No	14 (60.87%)	7 (70.0%)	21 (63.64%)			
Total	23 (100.0%)	10 (100.0%)	33 (100.0%)			

Did your institution communicate openly with you?	Managers				Chi square	p value
		UN	UDW	Total		
Yes	7 (36.84%)	2 (66.67%)	9 (40.91%)	0.332	0.544	
No	12 (63.16%)	1 (33.33%)	13 (59.09%)			
Total	19 (100.0%)	3 (100.0%)	22 (100.0%)			

Did your institution communicate openly with you?	Administration				Chi square	p value
		UN	UDW	Total		
Yes	2 (10.53%)	0 (0.0%)	2 (6.67%)	0.167	0.520	
No	17 (89.47%)	11 (100.0%)	28 (93.33%)			
Total	19 (100.0%)	11 (100.0%)	30 (100.0%)			

There were no statistically significant institutional differences but from the response of the managers, only one third of the ex UN staff received open communication as compared to two thirds of the ex UDW, but for the latter the numbers were small. ( $p=0.54$ ). The administration staff had minimal communication with regard to the merger, that is within ex UN 10.5% and within ex UDW 0% ( $p=0.52$ ).

Although 87.1% of the respondents were provided with a preview concerning the merger they were not given adequate information, and they reported that there was no regular communication, neither were they told how they would be affected nor what the merger aimed to achieve.

Of the respondents, 71.8% were not informed about the progress of the merger and hence did not feel part of the process, 90.6% considered the process was not well managed and 95.3% felt that more needed to be done to prepare staff for the merger.

The administration staff felt that the academic staff and the managers did not possess the same information about the merger and felt they were not adequately informed about the merger. Communication problems could undermine the commitment required for the merger to be successful.

All categories of staff indicated that they would have liked to have more information on the merger. The following comments confirm the need for enlightenment:

- Management must update and supply information as it becomes available.
- We want regular information sessions.
- We want to be kept in the information loop.
- Facts and decisions need to be communicated where there are trepidations and fears.

**TABLE 13.** Comparison of staff perceptions of merger success of the merger.

Number (%)

Rating Scale	Rating of the success of the merger process on a scale from 1-10						Chi square	P value
	UN		UDW		Total			
1	1	1.67%	0	0.00%	1	1.19%	2.905	0.940
3	1	1.67%	0	0.00%	1	1.19%		
4	1	1.67%	0	0.00%	1	1.19%		
5	3	5.00%	1	4.17%	4	4.76%		
6	2	3.33%	2	8.33%	4	4.76%		
7	12	20.0%	6	25.0%	18	21.43%		
8	35	58.33%	14	58.33%	49	58.33%		
9	4	6.67%	1	4.17%	5	5.95%		
10	1	1.67%	0	0.00%	1	1.19%		
<b>Total</b>	61	100%	24	100%	85	100%		

n=85

The majority of respondents (58.3%) from both the institutions gave the merger out of a possible “10” a score of “8” and between 20-25% of respondents suggested a score of “7” suggesting overall institutional support for the merger, There was no statistically significant difference between the institutions ( $p=0.94$ ). Staff morale as a result of the merger appeared high with over three quarters of respondents confirming the success of the merger with a 70-80% score. The new institution appeared to be developing an organizational culture that both ex UN and ex UDW employees could embrace.

**TABLE 14.** Comparison of changes in staff perceptions of the merger 18 months after the merger. Number (%)

In the 18 months since the merger have your perceptions about merger changed?	Respondents			Chi-square	p value
	UN	UDW	Total		
Yes	1 (1.67%)	0 (0.0%)	1 (1.19%)	0.405	0.525
No	59 (98.33%)	24 (100.0%)	83 (98.81%)		
Total	60 (100.0%)	24 (100.0%)	84 (100.0%)		

The majority of respondents remained positive about the merger and there were no institutional differences ( $p= 0.53$ ).



#### **4.5. LIMITATIONS OF THE STUDY**

1. This was a cross sectional survey so the direction of the statically significant associations cannot be established.
2. No pre and post survey was done. The study would have benefited from an initial survey being undertaken prior to the merger, and then a follow-up survey after the merger, with the same respondents, to investigate changes in their perceptions.
3. The response rate differed between the institutions and fewer academic staff responded than support staff. This could affect the results because the merger had different impact on the various categories of staff.
4. The biggest limitation was that the number of respondents at ex UN was less than fifty percent. Although the staff complement indicated equal numbers of academic and administration staff, more of the latter completed the questionnaire and the possible reasons for this can be attributed to the doctors, who comprised many of the ex UN respondents, perhaps being too busy in terms of the management of eg. the HIV/AIDS and TB epidemic. They are also busy with research, teaching and service to the patients. This faculty was less involved in the merger as previously there was only one medical faculty. They may thus be less or more favorably disposed towards the merger and therefore such responses would not have been captured.
5. The response to the questionnaire was extremely slow which resulted in the researcher sending reminders and extending the deadline but despite this some of the participants that were handed the questionnaire could not be found, hence the return rate was low.
6. The information from the responses to the open-ended questions by the respondents from both the universities allowed a more in-depth analysis of respondents' responses to

the merger, however, all the open ended questions were not answered by all respondents, and this limited further analyses of the perception of the respondents.

7. The difference in the size of the faculties of the previously separate universities was dealt with by using probability proportional to size sampling within the strata, in order to reduce bias.
8. No independent measurements were made to confirm the self reports about physiological changes.
9. The survey would have benefited from a larger qualitative component, to provide further insights into staff perceptions about the changes in organizational culture. Focus group discussions with staff, and individual interviews with key informants, could have provided additional insights. The information obtained from the open ended questions highlights the need for more qualitative research to be done in order to get a full understanding of respondents' views.
10. The accuracy of the empirical research might be disputable since the data was self reported and responses generated could have been greatly influenced by fluctuating emotions. The employees concerned may have feared losing their job, power or status and may have feared a lowering of salaries or benefits, therefore their responses could have been founded on fear rather than reason. Further, staff might have been biased or feared retribution. They may not have given their objective opinion of their fears, uncertainties and perceptions or opinions on how management supported or did not support them during the time of the merger. In anticipation of this participants were assured of anonymity and that management would not view individual responses. Thus the anonymous questionnaire was selected and confidentiality of respondents was assured.

## **CHAPTER 5 DISCUSSION**

The study examined the perception of staff at the two merged tertiary institutions (University of Natal and the University of Durban-Westville) concerning the impact of the merger on staff perceptions and staff morale in relation to organizational culture. Merging in this study refers to an organizational change phenomenon, and the different organizational cultures of the two organizations involved are part of the dynamics that impact on the success and staff morale.

### **5.1 MAIN FINDINGS OF THE STUDY**

In terms of staff responses, this study suggests that the cultures of both the universities are similar. This may be because of the similarities of their historical background and the same approach used by both universities in communication with staff regarding the merger. The similarity can also be attributed to both the universities offering the same field of study. Mergers of institutions with the same range of disciplines often mean greater commonality in academic culture but frequently major rationalization of course offerings will be necessary if cost saving and effective rationalization are to be achieved.

The impact of the merger did not differ with regard to the ex UN and the ex UDW employees' morale, regarding their personal reactions to the merger, but the ex UDW respondents were significantly more concerned about pay and benefits, perhaps because respondents in ex UN were older and would perhaps have been less concerned about the risks involved since they were more established.

Though many studies on merging and transforming of business have been done, fewer have been done on the merging of higher education institutions. There are different cultures within the merging institutions and possible clashes of the culture of merging institutions may represent significant problems. When there are broad cultural differences between the institutions these may affect every major decision and communication between the institutions. This part of the merger process is extremely difficult to define but it pervades all aspects of the new relationship. This aspect needs to be considered in higher education mergers in South Africa.

During any change, individuals are confronted with a multitude of new experiences and stress that impact to varying degrees on their personal and professional lives. The manner in which individuals perceive, define and experience these changes will vary according to a number of factors, including the effectiveness of the strategies chosen to cope with such change. In this study although all respondents did not agree to everything they understood the need for the merger and therefore they supported the merger. This may be due to the similar background in terms of the struggle against apartheid and the need for change.

While some respondents argued that the effect of the changes resulted in lower staff morale, others believed that individuals had developed greater self assurance about themselves as academics. Conversely, those academics that were less inclined to believe that they might effect some control over the changes, concurred that academics would just have to accept them.

Research indicates that many mergers have not resulted in the expected benefits, in part because organizations have neglected the human resource aspects of the change and the crucial role that they play in ensuring merger success (Kemp, 1994; Cartwright and

Cooper 1996; Dackert et al., 2003). In this merger the Human Resource Department (HRD) could have played an important role in explaining about such issues. In contrast to Australia where mergers within the Australian Higher Education domain were viewed by staff as threatening unique institutional strengths and traditions, these concerns were not found in this study (Harman, 2000). It was interesting however that amongst both UKZN groups the same concerns were expressed about the quality of education that the new institution would provide.

The approach adopted by one of the respondents provided a salient example of the adaptability of an academic who managed to work effectively within the organization, even though experiencing feelings of considerable rejection as a result of the changes, by actively increasing the level of self-value, despite the lack of personal recognition experienced. In this way the respondent was able to restore sufficient balance between work expectation and personal satisfaction to remain working at the University rather than resign. However, most respondents were able to maintain a positive morale. It may thus be argued that the majority of the respondents did not experience a lot of stress and anxiety regarding the merger. This was the perception at a specific time during the pre-merger stage and it is possible that this may have changed as the merger proceeded.

Although most of the respondents felt they understood the merger process there seemed to be a general feeling of concern about the operational aspects, control, changes in conditions of service and location of specific departments. Some respondents were concerned about the different cultures forced into one institution. These additional comments indicate that there was some scepticism about the future and that some of the respondents felt they did not have an attractive future at the new institution.

The responses indicate that management failed to provide a realistic merger preview and communicate openly and regularly with all employees. Employees perceived a lack of information about what the merger was meant to achieve, why it was important, and how they would be affected. However, despite employees not being fully aware of what to expect there was little reported stress or resistance to change. Despite the organizations' failure to communicate this did not appear to translate into reduced employee morale, a decline in productivity or increased turnover and absenteeism. In this study, although the majority of the respondents were provided with a preview concerning the merger, they were not given adequate information, there was no regular communication, neither were they told how they would be affected nor what the merger aimed to achieve. The majority were not informed about the progress of the merger and hence did not feel part of the process, and almost all staff considered the process was not well managed and felt that more needed to be done to prepare staff for the merger. It can be concluded that most respondents would have liked to have merger information and they also felt that management possessed more information than they did on the merger.

It is impossible to over-communicate throughout the merger process. Employees have an almost insatiable desire for information, and misinterpretation and rumors are very common. Communication is crucial even when there is nothing new to say. In this study there was overall a broad consensus of support for the merger although the importance of communication throughout the merger with key stakeholder groups came through as crucial to ensuring acceptance. The concern that insufficient information had been provided regarding the need for change and the progress regarding the merger left many respondents feeling they were being instructed to change rather than consulted.

It is important for management to create and implement a communication strategy that consistently communicates the new vision and strategy plans. This communication strategy should aim at assisting individuals to comprehend development and procedures. It is in the best interest of the institution to keep employees informed of progress and developments. By letting staff know where they stand with the merger, management acknowledges the importance of their work (Kemp, 1994; Cartwright and Cooper, 1996; Dackert, et al., 2003).

In this study individual rather than group needs were considered, in that managers who were experienced in university affairs were inexperienced in managing mergers, and they did not have the skills necessary to implement the changes required by the merger. As a result support staff felt that managers did not cultivate and sustain a sense of security, trust and optimism amongst the staff. Leaders did not focus on social integration of the staff, students and relevant stakeholders through communication and consultation, promoting teamwork and specific initiatives such as working on establishing core beliefs and values.

The respondents from both the universities considered that the merger had been successful although there had been a lack of communication by management about what was happening. The managers needed management styles and initiatives which were more mindful of the staff morale, their need for communication, and the existing cultures of the two universities, in order to minimize possible cultural conflict, and they needed to pay special attention to developing new loyalties, good morale and a sense of community within the newly created institution. However, there were more similarities than differences in the responses from the two previous institutions, suggesting that the two were able to merge fairly successfully, and staff morale appeared to have been maintained.

In this study the responses from both institutions indicated that they received no support from the Human Resource department (HRD) in terms of the preparation and progress of the merger. This lack of involvement of the HRD, whether perceived or real, provides opportunities for advocating a much closer relationship with staff during such mergers.

Responses to the open ended questions indicated that although commitment to the concept of a new university was generally quite strong, some respondents had looked to colleagues for support, and this had proved to be a great source of comfort and had assisted them to cope. This, it was argued, was in stark contrast to the level or lack of support offered to them by the management of the University. A far more user friendly approach was required, some argued, and a model of organization that is more supportive and addresses people's insecurities generated by the changes. The organizational changes had resulted in considerable alienation for some staff.

Although some staff complained of feeling exhausted and burnt out others remained positive, despite the difficulties experienced in the workplace. Internally motivated, these respondents utilized opportunities that arose in order to gain more control over their workplace environment through the adoption of numerous strategies including individual goal setting. As a result, they believed they had grown professionally from their experiences. By actively participating in the changes, rather than fighting against them these respondents had been able to increase their repertoire of behaviours, and this had produced a feeling of being more able to control the emotional tension, even in spite of an unstable work climate, and this had facilitated more control over the work environment.



Transformation is dependent on a culture of shared values, attitudes and behaviour of people within the emerging institutions (Nahavandi and Malekzadeh, 1999; Balestracci 2003; Alas and Vadi, 2004). Those aspects which are necessary for change are embedded in organizational culture, and impact on facets such as equity and redressing imbalances in the workplace (Granell, 1998; Skodvin, 1999; Crain, 2000). An analysis of the culture prevalent in merging institutions therefore has the potential to reveal the various values, attitudes and behaviours of those members undergoing the change.

Change is with us to stay, and not surprisingly, has always been so. What is surprising is our reluctance to learn from the experiences of the past in order to better facilitate effective organizational change in the present and the future, to ensure those individuals encapsulated within the process are not so adversely affected (Eckel, Hill and Green, 1998). Of importance is also the recognition by those charged with the responsibility for facilitating change of the need to be diligent in understanding and anticipating the possible effects and outcomes emanating from the organizational change process.

The results of this study suggest that staff is willing to participate in the development of the new institution and that building the organizational culture of the Health Science faculty of the UKZN to promote staff morale has potential to contribute towards attaining the government's merger goals.

People within the institutions exhibit different behaviours which ultimately impact on the change process (Kemp, 1994; Cartwright and Cooper, 1996; Dackert, et al., 2003). In this study the majority of respondents appeared to accept the changes whilst a few have gone even further and appear to have used the opportunity to get involved and advance their

careers and status. However there are tensions in the dynamics of the merger process which centre on factors such as risks, uncertainty, conflict and negotiation associated with change in any organization (Skodvin, 1999). This evidence is supported by international experiences. For example according to Skodvin, (1999), evidence from merger proposals in educational institutions in Sweden indicate that in spite of the mergers being voluntary there were experiences associated with stress, fear and tension.

It is important to listen to people who are affected by the merger. Ideally all staff should be involved in the merger design and implementation. Staff members who participate in the merger process will probably be more committed to the merger. Participation also provides an excellent opportunity for education and communication to move towards the vision set for the new institution and to implement proposed strategies, and the need for innovation is obvious. This usually means that the people in the organization are required to do new things in new ways within the new structure (Nahavandi and Malekzadeh, 1999; Balestracci, 2003; Alas and Vadi, 2004). In this study the respondents from both institutions expressed their concern about such issues particularly with respect to policies and administration.

Other concerns were about students and discipline amongst the employees although this was evident even before the merger in the strikes and boycotts experienced at the previous institutions. Respondents noted that this is an ongoing problem which may be worsened by the merger because of the changes in management and policies which may not be implemented on time.

## **5.2 MEANING OF THE STUDY**

This was an involuntary merger initiated by the government which was achieved with comparatively little conflict and the kind of anxiety and disturbances that have characterized even many successful mergers (Mbigi and Maree, 1995; Jinabhai, 1998). The government had taken the view that voluntary mergers were unlikely to work effectively therefore the cabinet approved a national plan for mergers following extensive consultation with institutions and other stakeholders. The consolidation of the two universities took far more effort and time to organize, and involved difficult issues such as the choice of a name for the new institution, how the Chief Executive Officer was appointed, adoption of new academic and administration structures, the portfolio of courses that was offered, and the academic rationalization of courses. The merger between UN and UDW can be discussed as a single sector and two partner mergers where the mission and roles of both the institutions can be described as the same and the level of conflict was minimal. The organizational arrangements proved feasible to arrange. Because of similar academic profiles major rationalization of course offering was necessary to save costs and to achieve effective rationalization, but this was not a major issue in the Health Science Faculty as the institutions had historically offered different courses. The result from the Health Science Faculty merger may thus not be generalisable to other faculties within the institution.

The challenges facing the South African education system are rooted in historical prejudices. The legacy of the past authority is still prevalent, which promotes practices that are based on racial, gender and cultural domination (Department of Education, 1997;

Wines, 2004). Yet these dimensions fail to reflect the reality of today's South African demographics, especially in governance, management and technological studies.

The key features of the contemporary South African educational institutions were that the majority of staff was white, with white males dominant at managerial levels. The black workers were mostly employed as general support staff (Department of Education, 1997). Clearly there are fewer black role models (Mbigi and Maree, 1995; Jinabhai, 1998). Nevertheless there is a growth in black student numbers in what were historically white universities. Thus several features raise the challenge of multiculturalism in a globalized arena which promotes egalitarianism. This obliged the South African Education Ministry to institute a National Committee to prepare the Education Management Report (Department of Education, 1997). A salient outcome from this National Committee was a document that highlighted the need for revitalizing human resource management practices.

The majority of the respondents felt that management was not aware of their feelings, emotions and attitudes during the merger. This may suggest that the leaders themselves were inexperienced and took some time to come to terms with the necessary change, therefore the employees did not receive the necessary support during the merger.

### **5.3 IMPLICATION FOR POLICY MAKERS**

Managers should be familiar with and prepared to deal with the 'merger syndrome', in which employees initially react to the merger announcement with denial, fear, anxiety and anger, but learn in the end if the transition is properly managed to recognize new opportunities in the new organization and become committed to it (Pritchard, 1993).

If senior HR personnel are included in the decision making, organizations get a better understanding of the human implications of the merger. HR staff should determine to what extent the organizational cultures are compatible and provide recommendations for overcoming differences (Harman, 2002). It would appear from this study that more could have been done to improve communication with the administrative staff. Employee assistance programmes should be used to reduce stress and help employees cope with the change (Harman, 2002). Counseling will help employees distinguish the real from the imagined effects of the merger and clarify their own career choices. In this study it was found that the pressure was there, and the need for support was paramount, yet the required provision for greater assistance by management was not forthcoming. Some respondents thus looked to colleagues for support, and this had proved helpful, but it would have assisted staff if mechanisms had been in place during the merger process.

HR should help develop a new organizational structure and establish clear, well defined reporting relationships. Most unsuccessful mergers have suffered from unclear relationships and a tendency to change poorly defined relationships several times during the first year (Harman, 2002). This study suggests that specific short-term organizational goals should be defined to provide employees with a clear direction.

HR personnel should conduct a talent audit to identify employees who will be critical to the success of the new organization and who would be difficult to replace. Long-term incentive grants at UKZN could perhaps be provided to critical employees to entice them to stay with the merged organization and enhance motivation.

In the strategic planning phase, HR personnel should assess the corporate cultures of the two organizations to identify areas of divergence which could hinder the integration process. Communication methods, compensation policies, and organizational goals need to be assessed. Before reaching a conclusion, the organization can agree on what elements of their respective cultures should be retained and how they will rectify significant differences (Kemp, 1994; Cartwright and Cooper, 1996; Dackert, et al., 2003).

Respondents emphasized the lack of communication in this merger. However at both universities (UDW and UN) there had been a history of struggle against apartheid and this shared culture may have assisted in the merger.

By conducting an employee attitude survey organizations can elicit common employee perceptions and concerns and allow the new management to create a more appropriate integration plan, develop tools to minimize employee stress, and send a message that the organization truly cares about its human resources (Kemp, 1994; Cartwright and Cooper, 1996; Dackert, et al., 2003). The respondents noted that in this merger these factors were not addressed by management and as a result of this study, management should implement further surveys every two or three years to monitor staff concerns.

Effective leadership and management from the top are seen as the most important factors in assuring the success of the merger. In this transformational role, and in keeping with traditional academic culture, the chief executive of a newly merged institution would do well to put the human factor high on the agenda if the merged institution is to grow healthily in the post-merger period. This would involve consulting widely, empowering subordinates, delegating authority extensively, and implementing strategies that will develop new loyalties, high morale and a sense of community within the newly created institution (Pritchard, 1993). Respondents were optimistic about the future of the merged institution and this provides a good base on which to build.

It is clear that a big challenge for managers of change in higher education institutions is to capitalize on promoting forces, identify and manage resisting forces effectively and to try to work towards a cultural shift that is strategically determined and has wide acceptance by all key stakeholders. Looking to see how other institutions with similar attributes have responded successfully to this challenge would be a useful first step in developing their own policies. Mergers amongst universities in the developed world such as the UK and Australia provide some guidelines but the South African historical experience is unique (Harman, 2002).

The most important concern for the staff at both the former institutions was in respect of policies and procedures, following the change in management. Respondents expressed their concerns about the change in policies that were not thought through carefully and all relevant stakeholders were not consulted. They also expressed their concern about the top down approach from the management. However the people involved in the merger were also often inexperienced in their new positions and lacked experience in mergers. Both

institutions had been involved in transformation of their universities to meet the post 1994 challenges, and this compulsory merger was a further challenge.

Respondents indicated that they were willing to support the merger process. However the swallowing up of a smaller institution by a larger institution was a real possibility, even though task teams were operating on an equal footing.

In any merger there will be both winners and losers and the impact on individuals will be mixed. But if the settling down period is not managed relatively quickly, effectively and with super-sensitivity, the impact of the merger on morale and loyalty of staff can be problematic. The majority of the respondents at UKZN felt that the institution will benefit from the merger and they support the merger, although insufficient attention had been paid to the problems concerning the merger.

In successful mergers leadership in the early stages is typically strongly directive. However as the institution changes over time, the style of leadership needs to change and become less controlling from the top with more focus on building morale and developing loyalty. While factors such as good timing, appropriate processes and style of leadership seem to facilitate successful post-merger integration, cultural factors can act as powerful constraints. Coordinating and integrating different organizational cultures is one of the most demanding, complex and problematic aspect of mergers and acquisitions. Cultural orientation can significantly limit what organizational members are willing to accept in the merger (Milward, 2002). Both universities involved in this merger had been involved in change through the 1990s and this background of transformation may have assisted in promoting a 'culture of change'. Senior management however needs to understand how change works and the effects it has on the staff. They must acknowledge staffs myths,



realities and historical culture and reduce the fear of change that naturally exists in the staff. They need to build trust and confidence. The human aspects should be accorded the same emphasis and attention as financial, legal, and strategic concerns (Milward, 2002). This study indicates that management failed to provide optimal leadership.

## **CHAPTER 6 - CONCLUSIONS AND RECOMMENDATIONS**

### **6.1 CONCLUSIONS**

The merger of institutions cannot automatically and successfully take place without management's direction and planning and the success of a merger is greatly dependent on the calibre of leadership and management which is also the precursor of future prosperity. Successful mergers occur when there is an attitude of flexibility and co-operation. Mergers have the potential to affect every aspect of an organization in a practical sense. This study highlighted stressors that often accompany mergers. From the study findings the merger created a feeling of uncertainty amongst employees, and employees felt that management should have provided the necessary support that was required during the merger. However this study also indicates that most respondents support the merger and believe that the institution will be strengthened.

This study also emphasizes the importance of leadership and management before, during and after a merger. There was a strong need for emotional support from management during the pre-merger phase. Management needed specific skills and training to lead employees during the merger and this appeared to be insufficient.

An understanding of organizational culture is clearly important to the study of institutional transformation, given that transformation "alters the culture of the institution by changing select underlying assumptions and institutional behaviours, processes, and products"

( Eckel et.al., 1998). At the same time organizational culture and cultural change can be used as a means of preparing an environment for transformation, a yardstick for assessing whether or not such change has actually taken place, and a means of achieving the desired results. Pre and post measurements are thus required and can be useful for monitoring the process and identifying areas of concern.

## **6.2 RECOMMEDATIONS**

1. The results have shown that communication is an area of critical importance during a merger. Employees want to receive comprehensive information. It is important for management to create and implement a communication strategy that consistently communicates the new vision and strategic plan. The new communication strategy should aim at assisting individuals to comprehend developments and procedures. It is in the best interests of the institution to keep employees regularly informed of progress and development. The importance of communication in the merger process was emphasized. The importance of frequent, clear, consistent and honest communication with all the stakeholders during the merger cannot be over-emphasized
2. Senior management should commission a comprehensive cultural audit survey of UKZN's organizational culture which would aim to understand the perceptions of different groupings in respect of the institution's mission and goals in order to work towards the needs and ambitions of a the new university. Both qualitative and quantitative methods of investigation are recommended, including surveys, interviews and focus group discussions of the perceptions of different staff, students and stakeholder groups.
3. Human Resource Management, throughout and after the merger needs to be based on a sophisticated understanding of the organizational culture of both previous organizations

and the climate to be fostered in the merged institution. This is key to the maintenance of staff motivation, commitment and loyalty that needs to be energized.

4. A follow up study after 5 years should investigate the organizational culture of the new institution, and the extent to which it is meeting government's broad higher education goals.

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