Expectations and concerns of library staff before and after a merger

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Abstract

This paper compares and discusses some of the main findings of two surveys to determine expectations and concerns of library staff before and after a merger. The findings showed that expectations and concerns that library staff members have before a merger do not necessarily disappear away after the merger has taken place. If left alone, expectations and concerns may change over time or it may even increase. In the light of the findings the author gives possible explanations to why some of the expectations and concerns changed over time in the absence of any deliberate intervention from library managers.

Introduction

Background

On 1 January 2004 three former *technikons*[1] in South Africa merged to become the Tshwane University of Technology. While preparing for the merger by studying the literature on mergers it soon became clear to library managers that mergers can have a significant impact on employee attitudes, performance and behavior.[2-3] This is often the result of real or perceived concerns and expectations. It is therefore understandable that some authors recommend that institutions closely examine the negative implications of their mergers in order minimize loss of talent, energy and productivity.[4] The literature also makes it clear that in a merger situation managers should pay close attention to the merger-related questions and concerns of their staff in order to tailor their own communication to the needs of their staff.[5] These and similar recommendations stimulated the author of this article to determine the merger-related expectations and concerns of the library staff involved in the merger of three technikons concerned.

Purpose of the investigation

The initial purpose of the investigation was to determine the expectations and concerns of library staff before the merger, and then to react on results of the survey by addressing and managing those expectations and concerns, and finally to follow up with a second survey two months after the merger to see what the effects of the earlier intervention were. However, due to various reasons the managers of the three libraries concerned did not use the results of the first survey to address the expectations and concerns of their library staff in time before the follow-up survey. The follow-up survey nevertheless went ahead as scheduled. When the results of the two surveys were compared and analyzed it showed some interesting findings. That stimulated the researcher to look for reasons that may have caused a difference in results in the absence of any deliberate intervention from library managers.

Research questions

In order to gain an overall insight into merger-related expectations and concerns of library staff before and after a merger, this study addressed three specific research questions:

1. How important is it to library staff of the three merging institutions that certain work-related conditions stay the same?

2. Which concerns that people have during a merger apply to the library staff members of the three institutions?

3. When library staff members think of the merger, which moods describe them best?

The purpose of the third question was to determine the emotional impact of the merger on library staff members and how far they have progressed in coming to terms with the merger. This data was needed to assist managers to manage expectations and concerns of library staff.

Why is the paper important?

Although the results presented and discussed in this paper are based on a case study of three libraries in South Africa the importance of this paper is not limited to those three libraries only. Library managers of other libraries can use the findings of this study to predict concerns and expectations of their staff in similar merger situations or in large scale organizational restructuring. This study also contributes to the research literature on library mergers. As far as known it is the first study of this kind to measure and compare the expectations and concerns of library staff before and after a merger. Finally, researchers can build on this study to improve methodology and to compare results.

Research method

In both surveys the researcher used the same questionnaire containing fifty-one structured questions and one unstructured or open-ended question. No sample was taken. Instead the questionnaire was given to all library staff members of the three merging institutions.

Of the 123 questionnaires that were distributed before the merger sixty-two (50.4%) were returned. In the follow-up survey two months into the merger the same number of questionnaires was distributed but the response was slightly worse: Only fifty-four questionnaires (44%) were returned. Although the response was relatively low it was still sufficient to make valid conclusions.

The results of both surveys were entered into Excel, a spreadsheet program, and converted by the SAS program (Statistical Analyses Software Package, Version 8.1) to frequency tables for all variables, and cross-tabulation tables for selected variables. Using the same questionnaires with the same measurement scales allowed for data from the two surveys to be compared and combined when appropriate.

Findings, analysis and conclusions

How important is it that work-related conditions stay the same?

The questionnaire included a list of fourteen conditions such as staff benefits, policies, procedures and job descriptions that are likely to be affected by a merger. With regard to each condition respondents had to indicate on a five-point Likert scale how important it was for that particular condition to stay the same, ranging from "not important" to "very important".

Without having to present all the data it is sufficient to report that both the surveys indicated a strong preference from the respondents that most work-related conditions should stay the same. Therefore I will only report on findings with regard to those conditions that respondents regarded as either important or very important to stay the same (figures 1 and 2).

FIGURE 1
The five most important conditions that should stay the same
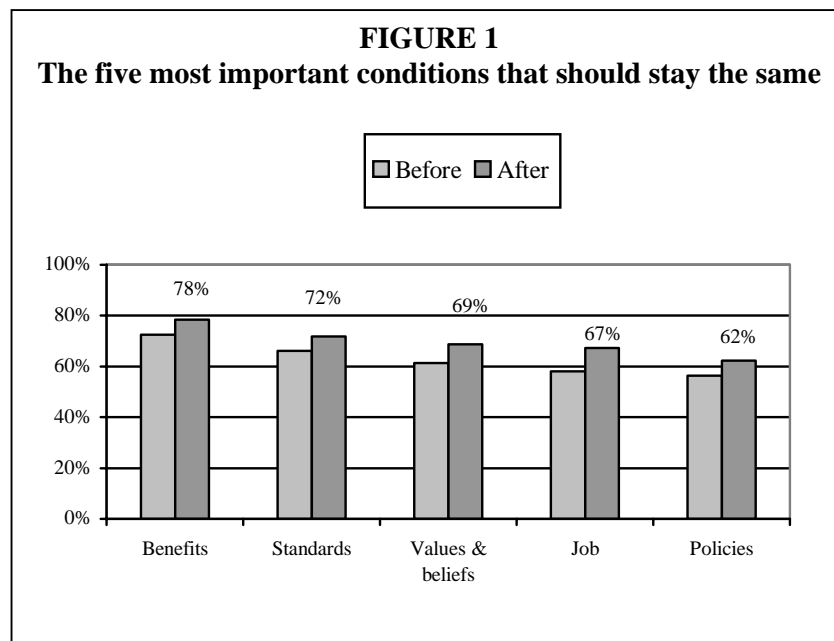
When analyzing the data in figure 1 it seems that the conditions that library staff regard as either important or very important to stay the same relate firstly to job security: they want to keep the same job and the same staff benefits. Secondly, is it important to them that conditions involving the quality of their jobs stay the same: to have the same standards, the same values and beliefs, and the same policies. It is also interesting to note that the five conditions that the majority of library staff members regarded as either important or very important to stay the same were exactly the same in both surveys. Furthermore, after the merger a higher percentage of staff members expect those conditions to stay the same.

If one look at the five conditions that least staff members regarded to be important or very important it shows that they were also the same in both surveys. Those conditions are: to have the same office, same users, same director, it team members and same supervisor (figure 2). When comparing the data in figure 1 with that in figure 2 one can draw the conclusion that to the majority of library staff it was more important that their jobs and the values, policies and standards attached to

their jobs stay the same, rather than who their colleagues or managers are or in what office they perform those jobs.

FIGURE 2
The five least important conditions that should stay the same
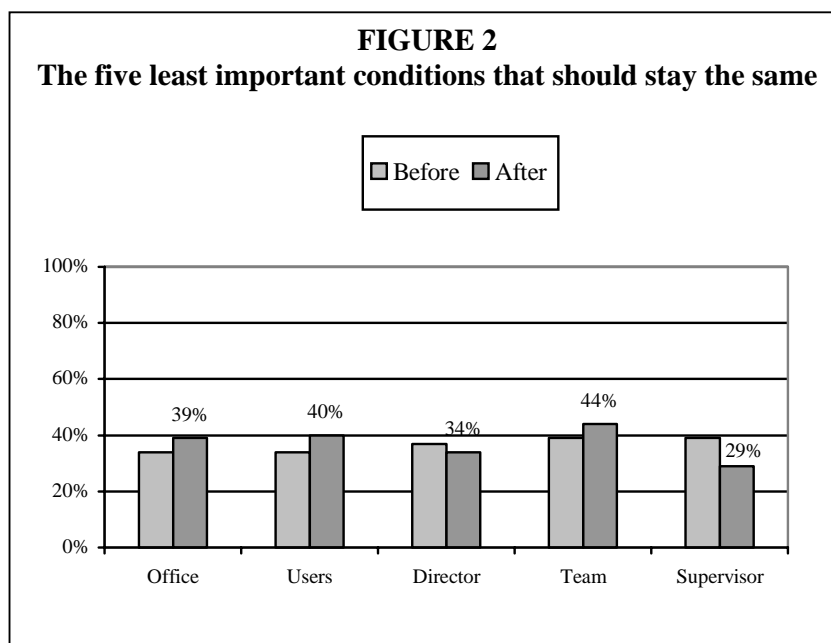
With the aid of cross-tabulating certain data I was also able to determine which segments or groups of library staff expect conditions to stay the same.

Table 1 shows the percentage of staff in each group who wanted conditions to stay the same. It is clear from table 1 that the group with the highest percentage of staff who wanted conditions to stay the same represented staff with one to five years of service. It also shows that percentages in that group increased substantially after the merger

TABLE 1					
Conditions that library staff regarded very important to stay the same					
Conditions	1 – 5 years employed		6 – 10 years employed		11 –15 years employed	
	2003	2004	2003	2004	2003	2004
	N = 16	N = 5	N = 23	N = 28	N = 14	N = 14
	%	%	%	%	%	%
To have the same staff benefits	23.3	63.6	36.7	27.3	26.7	9.1
To have the same standards	35.0	65.0	15.0	35.0	35.0	0
To have the same job	35.3	80.0	23.5	13.3	23.5	6.7
To have the same values and beliefs	31.3	60.0	25.0	33.3	31.3	6.7
To have the same policies	22.2	66.7	11.1	33.3	44.4	0

To communicate in the same language as before	9.1	57.2	27.3	35.7	36.4	7.1
To be in the same team	54.5	100	0	0	36.4	0
To have the same library director	27.3	77.8	27.3	0	18.2	22.2
To have the same job title	50.0	63.6	10.0	9.1	20.0	27.3
To have the same supervisor	40.0	100	20.0	0	30.0	0
To have the same office	44.4	66.7	11.1	11.1	11.1	22.2
To have the same procedures	50.0	72.7	0	27.3	37.5	0
To have the same customs and traditions	37.5	60.0	12.5	40.0	25.0	0
To have the same users	40.0	77.8	60.0	22.2	0	0

What are the merger-related concerns of library staff?
The findings of the two surveys are captured in table 2.

TABLE 2 **Merger-related concerns of library staff**		
Concerns	**Library staff**	
	2003	**2004**
I might be expected to do a different job	77.4%	72.2%
I might get a new supervisor	72.6%	64.8%
The library might get a new director	71.0%	64.8%
I might get new team members	66.1%	62.7%
I might be relocated to another library	75.8%	61.1%
I might be expected to adapt to a new organizational culture	71.0%	59.3%
My skills and past experience might not be recognized	50.0%	48.2%
The library leaders might not act in my best interest	41.9%	42.6%
My team members might loose their jobs	56.5%	35.2%
I might loose my job	56.5%	27.8%
I might not be happy in the new, unified library	24.2%	25.9%
Median average	66.1%	61.1%
Mean average	61.41%	54.3%

When analyzing the results in table 2 one can come to the following conclusions:

The concern that applied to most of the library staff is that they might be expected to do a different job. Although after the merger fewer staff members were concerned about this possibility, it nevertheless ranked top of the list of concerns.

The concern that applied to the fewest library staff members before and after the merger was that they might not be happy in the new unified library.

It also seems that the percentage of staff members that expressed merger-related concerns was lower after the merger than before the merger. (On average 61.4% of library staff members had concerns before the merger while the percentage lowered to 54.3% after the merger). This downward tendency applied particularly to the following four concerns: "I might be relocated to another library", "I might be expected to adapt to a new organizational culture", "I might loose my job", and "My team members might loose their jobs".

When they think of the merger, which moods describe the library staff best?

Before presenting and discussing the next set of results, it is necessary to give some background on stages people go through when they experience major life changes, for example a merger.

It is known that people pass through different emotional stages when dealing with change. One of the models mapping those emotional changes describes it as follows: In the first stage you experiences loss; you have feelings of frustration and powerlessness, your thoughts are cautious and your behavior is often paralyzed. As time goes by you may or may not move forward in the so-called change cycle. The ideal is that you eventually get through a number of these stages until you reach the stage of integration where you have feelings of satisfaction; your thoughts are focused and your behavior is generous.[6]

One of the questions in the survey was to learn more about the feelings, thoughts and emotions of library employees to determine in which stages of the so-called change cycle they were. The results are shown in table 3 and are illustrated graphically in figures 3 and 4.
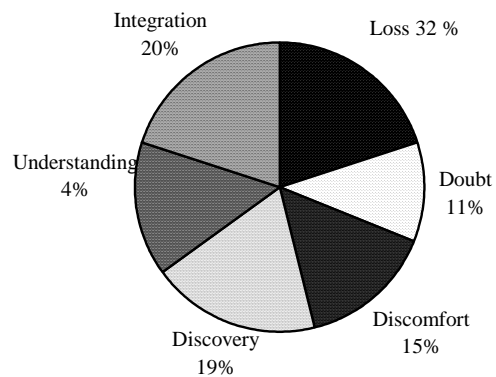
TABLE 3

Feelings, thoughts and emotions of library staff which describe their progress in a change cycle

Stages in the change cycle	Feelings, thoughts and emotions	Before the merger		After the merger	
		N	%	N	%
Loss	Frustrated	14	28	6	11
	Powerless	2	4	5	9
Doubt	Sceptical	5	10	5	9
	Uncaring	3	6	1	2
Discomfort	Anxious	9	18	5	9
	Confused	4	8	3	5.5
Discovery	Creative	8	16	4	7
	Anticipating	3	6	6	11
Understanding	Confident	2	4	6	11

		Pragmatic	0	0	2	4
Integration		Satisfied	0	0	3	5.5
		Focussed	0	0	8	15
		TOTAL	50	100	54	100

FIGURE 3
How library staff experienced change before the merger

Integration 0%

Understanding 4%

Discovery 22%

Loss 32 %

Discomfort 26%

Doubt 16%
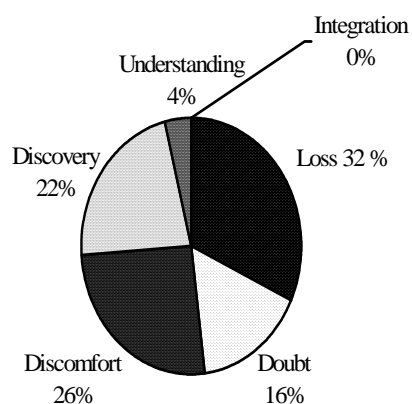
FIGURE 4
How library staff experienced change after the merger

Integration 20%

Understanding 4%

Loss 32 %

Doubt 11%

Discovery 19%

Discomfort 15%

The results in table 3 and figure 3 show that in the four months before the merger the majority of library staff (74%) was still in the first three stages of the change cycle. No one was in the last stage, namely, the integration stage. In the follow-up survey, two months after the merger (table 3 and figure 4), only 46% of staff members were still in the first three stages. It is also clear from the two sets of results that there was a definite movement away from the beginning stages of the change cycle towards the end of the cycle. One can therefore draw the conclusion that two months into the merger there were clear signs that most of the staff members were coming to terms with the changes the merger brought to their lives. However, a noticeable percentage (20%) of library staff members were still experiencing emotions of powerlessness and frustration which are identified with loss.

Possible reasons why library staff's expectations and concerns changed over time

As indicated earlier in this paper, the purpose of this investigation was not only to determine what the expectations and concerns of library staff were before and after a merger, but also to find answers to why some of those expectations and concerns have changed over time – especially in the absence of any deliberate intervention from library managers. For the purpose of this paper I have focused only on findings that indicated noticeable or important differences before and after the merger.

(a) Why is it that two months into the merger a higher percentage of staff members regarded it very important that issues regarding job security and the quality of their jobs stay the same?

It is indeed difficult to find an answer to this question especially in the light that after the merger fewer staff members had concerns and there was also clear signs that they started to come to terms with changes that the merger brought. A possible explanation could be that, although the library staff had less concerns after the merger and although they started to come to terms with the merger, they nevertheless regard it very important that certain conditions stay the same. This is probably an indication to managers that, whichever way the merger goes, they (the managers) should not interfere with their employees' jobs, job benefits and the quality of their jobs.

(b) Why is it that most of the library staff who were employed less than six years at their institutions was in favor of conditions staying the same, and why is it that in the follow-up survey even a higher percentage of juniors (in terms of years of service) wanted conditions to stay the same?

A possible explanation to this question is the following: Because junior staff members of the three merging libraries were less involved in merger activities than their senior counterparts, they were mostly on the periphery of activities and had few opportunities and influence of shaping their own futures. In other words, the junior library staff members were mostly onlookers to processes that were changing their careers and lives. Closely related to this is the fact that junior staff members were also often the last in the communication chain to receive information about merger plans and developments.

The fact that a higher percentage of junior staff members wanted conditions to stay the same at the time of the follow-up survey (two months into the merger) is probably a way of showing concern that conditions were not going the way that they (the juniors) had expected it to go. It is probably also a louder cry-out to library managers to assure them that changes which the merger has brought or is still to be implemented will not be to their detriment.

(c) Why were fewer staff members concerned after the merger about certain merger issues?

There are two possible explanations for this phenomenon: Firstly, it is quite possible that after a lapse of six months since the first survey, library staff had shed most of their fears and concerns for the unknown. At the time of the second survey a number of interim structures had been implemented, policies and processes were in the process of being integrated, and many of the staff members had been involved in integration activities. A second possible explanation can be attributed to a combination of leadership and communication issues. Before addressing those issues, it is necessary to put it into perspective by referring to what the merger literature says in this regard.

The merger literature is very clear that communication plays a crucial role in dealing with staff issues throughout a merger process. Appelbaum et.al.[7] capture the essence of some of these viewpoints by stating that the provision of clear, consistent, factual, sympathetic, and up-to-date information in various ways will increase the coping abilities of employees during a merger.

As indicated earlier in this paper, the managers of the three merging libraries did not react on the results of the first survey in a pre-planned way. Nevertheless, it is most likely that information on the merger process that library managers communicated to their staff and the way in which they conveyed this information contributed to the reduction of merger concerns. Methods that library managers used to communicate merger conditions to their staff members include briefings and feedback at library staff meetings, group e-mail to library staff members, posting agendas and minutes on the library's intranet, one-to-one communication, informal feedback during tea breaks, and involving library staff members in merger planning and/or integration teams. Apart from receiving merger-related information from library managers, library staff members were also informed, like the rest of the staff of the three merging institutions, by briefings from the vice-chancellor, trade union members, official merger newsletters, staff newsletters, circulars, intranet newsletters and discussion boards. Though it is impossible to determine what information or whose information contributed to the reduction of staff concerns, it is fair to conclude that it was probably due to the combined efforts of various people, methods and communication channels.

However, the question remains, notwithstanding the positive influence of communication, why it is that over a period of six months more staff members became concerned about certain conditions while the opposite happened to other conditions?

Closing remarks

With this paper I briefly compared and discussed some of the main findings of two surveys to determine expectations and concerns of library staff before and after a merger. I also gave possible explanations to why some of the expectations and concerns changed over time. However, the importance of the findings lies mainly therein that it draws attention to the fact that in a library environment merger-related expectations and concerns are also very real and alive. It also showed that expectations and concerns that people have before a merger do not necessarily go away after the merger has taken place. If left alone, expectations and concerns may change over time or it may even increase, as we have seen in this study. Whichever way it goes, managers should be aware that as long as their staff experiences those expectations and concerns it could manifest in a number of ways – including psychological, physical and social disorders. But that is a topic for another investigation.

Notes

1. A *technikon* is a technological higher education institution in South Africa.

2. Hong-Wei Huang, "College and University Mergers: Impact on Academic Libraries in China," *College & Research Libraries*. 61 (Mar 2000): 123.

3. John C. Bruckman and Scott C. Peters, "Mergers and Acquisitions: The Human Equation," *Employment Relations Today*. (Spring 1987): 1–6. Available online from http://www.changemanagementgroup.com/merger1.phtml

4. Ibid., 1.

5. James W. Waker and Karl F. Price, "Why Do Mergers Go RIGHT?," (May 2000):5. Available online from http://www.walkergroup.com/docs/Mergers.doc

6. Lillie R. Brock and Mary Ann Salerno, " *The Change Cycle; The Secret to Getting Through Life's Difficult Changes*. (Virginia: Bridge Builder Media, 1994), 23 – 24.

7. Steven H. Appelbaum, et.al., "Anatomy of a Merger: Behavior of Organizational Factors and Processes Throughout the Pre- During- and Post-Stages (Part 1)," *Management Decision*. 38 (2000): 658.