
FORCES IN THE MERGING OF UNIVERSITIES – A CASE STUDY

J.M. Jacobsz

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Supervisor: Prof. S. Rothmann

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COMMENTS

The following matters are brought to the attention of the reader:

- The editorial style as well as the references in this dissertation follow the format prescribed by the Publication Manual of the American Psychological Association (APA). This practice is in line with the policy of the Programme in Industrial Psychology of the North-West University (Potchefstroom) to use APA style in all scientific documents as from January 1999.
- The dissertation is submitted in the form of two research articles. The editorial style specified by the South African Journal of Industrial Psychology (which agrees largely with the APA style) is used, but the APA guidelines were followed in constructing tables.

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ABSTRACT

Title: Forces in the merging of Universities – a case study

Key terms: Merge, universities, higher education, psychological, forces, act of forces.

Much change has resulted from pressures at a global level, which now impact on South Africa as a member of the international community. Some changes were dramatic and, to a limited extent, resulted in revolutionary transformation. Various problems were experienced in the higher education sector in general. Merging of some higher education institutions in South Africa as part of transformation seemed to be an obvious solution. This was welcomed by some, yet resisted by others. Various forces started to evolve in the merging process. Owing to one of the most important characteristics of a force, namely its directedness, it can only be perceived (visibly) in its psychological context.

The first objective of this study was to conceptualise some psychological forces within the context of a merging higher education institution. The second objective was to determine the perceptions and attitudes of academic school directors, deans and vice-rectors towards the thematically identified psychological forces in a quantitative manner. The last objective was to make recommendations on how the psychological conceptualisation of forces could be utilised in the future development of the merged university in this study.

A qualitative exploratory and descriptive design was used to identify items that could be used in a quantitative survey. The quantitative data collected were used to assess interrelations among constructs. Constructs consisted of items related to the force as well as the psychological domain. Cronbach alpha coefficients and factor analysis of items linked to each construct were performed to confirm uni-dimensionality. Practically significant differences between certain constructs were reported by using Cohen's *d*-value. A measure of sampling adequacy (MSA) was also conducted as developed by Kaiser. Variances were explained and communalities were also indicated.

Regarding the first objective, it was determined that the government, council, management, students and alumni, culture, strategy, peers and resources were identified in the three psychological domains. Regarding the second objective, the results indicated the highest affectivity towards management and the lowest towards council; the highest cognition for management and the least for council; and a positive conation towards management and a less positive conation towards council. However, communalities lower than 50% were reported on the construct "*conative towards council*". It could therefore be concluded that, based on the identified forces and their respective links with the psychological domains, evidence exists of negative affectivity towards and limited understanding of council. The contrary, however, applies in the case of management, which attracted much affectivity, cognition and conation in respect of the merger.

Recommendations are made for the organisation and for future research.

OPSOMMING

Titel: Kragte in die samesmelting van universiteite: 'n gevallestudie

Sleuteltermes: Saamsmelt, universiteite, hoër onderwys, sielkundige kragte, aksie van kragte

Druk op wêreldwye vlak het baie verandering tot gevolg gehad, en dit het nou 'n impak op Suid-Afrika as 'n lid van die internasionale gemeenskap. Sommige veranderinge was dramaties en het, in beperkte mate, revolusionêre transformasie tot gevolg gehad. Verskeie probleme is in die hoëronderwyssektor ondervind. Die samesmelting van hoëronderwysinstellings in Suid-Afrika as deel van transformasie, het na 'n vanselfsprekende oplossing gelyk. Dit is deur sommige mense verwelkom, terwyl andere weerstand daarteen gebied het. Verskeie kragte het begin om rondom die samesmeltingsproses te ontwikkel. As gevolg van die belangrikste kenmerke van 'n krag, naamlik die gerigtheid daarvan, kan dit slegs (sigbaar) in die psigologiese konteks daarvan waargeneem word.

Die eerste doelstelling van hierdie studie was om sommige psigologiese kragte binne die konteks van 'n samesmeltende hoëronderwysinstelling te konseptualiseer. Die tweede doelstelling was om die persepsies van en houdings van akademiese skooldirekteure, dekanes en viserektore tot die temas geïdentifiseerde psigologiese kragte kwantitatief te bepaal. Die laaste doelstelling was om aanbevelings te maak oor hoe die psigologiese konseptualisering van kragte in die toekomstige ontwikkeling van die saamgesmelte universiteit in hierdie studie benut kan word.

'n Kwalitatiewe eksplorerende en beskrywende ontwerp is gebruik om items te identifiseer wat in 'n kwantitatiewe opname gebruik kon word. Die kwantitatiewe data wat versamel is, is gebruik om onderlinge verhoudinge tussen konstrakte te evalueer. Konstrakte bestaan uit items wat met die krag sowel as die sielkundige domein verband hou. Cronbach-alfakoëffisiënte en faktoranalise van items gekoppel aan elke konstruk is uitgevoer om eendimensionaliteit te bevestig. Prakties betekenisvolle verskille tussen sekere konstrakte is gerapporteer deur van Cohen se *d*-waarde gebruik te maak. 'n Meting van die toereikendheid van steekproefneming

(MTS) soos ontwikkel deur Kaiser is ook uitgevoer. Variansies is verduidelik en kommunaliteite is ook aangedui.

Wat betref die eerste doelstelling is daar bepaal dat die regering, die raad, bestuur, studente en alumni, kultuur, strategie, eweknieë en hulpbronne in die drie psigologiese domeine geïdentifiseer is. Wat betref die tweede doelstelling het die resultate op die hoogste affektiwiteit vir bestuur en die laagste vir die raad gedui; die hoogste kennis vir bestuur en die minste vir die raad; en op positiewe konsasie wat betref bestuur en 'n minder positiewe konsasie wat betref die raad. Kommunaliteite van minder as 50% is egter teenoor die konstruk "*konatief teenoor raad*" gerapporteer. Daar kan dus tot die slotsom gekom word dat, op grond van die geïdentifiseerde kragte en hul onderskeie skakels met die psigologiese domeine, daar bewys van negatiewe affektiwiteit teenoor en beperkte begrip vir die raad bestaan. Die teenoorgestelde is egter van toepassing in die geval van bestuur, wat baie affektiwiteit, kennis en konsasie ten opsigte van die samesmelting ontlok het.

Aanbevelings is vir die organisasie en vir verdere studie gemaak.

CHAPTER 1

INTRODUCTION

This dissertation deals with the identification of the forces embedded in the merger process of two universities in South Africa and the incorporation of one campus of a third university. Furthermore, the perceptions and attitudes of academic management towards the identified forces that manifested during the merger process were compared and analysed.

In this chapter a brief overview is provided of the problem statement, the research objectives, the research design and the division of chapters.

1.1 PROBLEM STATEMENT

Since the late 1980s, when it first became evident that an end to apartheid was inevitable, the South African higher education system has been subjected to enormous changes. Some of these changes have resulted from legislation enacted by the democratic government elected since 1994. Other changes have arisen as a result of pressures at a global level, which now impact on South Africa as a member of the international community, and yet more result from social and economic shifts within the country itself (Boughey, 2004).

According to Wolpe (1995), the election victory of the African National Congress (ANC) in 1994 marked a dramatic and indeed, to a limited extent, revolutionary transformation. This transformation was revolutionary in the sense that stable institutions of democratic and representative government were established, and it was limited in the sense that, parliamentary structures apart, the institutional and social structures created in the apartheid era remain largely intact.

Wolpe (1995) furthermore argues that the central developmental task facing the country is focussed precisely on the strategies to be followed in order to change these institutional and social structural conditions to bring about a democratic social

order in which race and gender inequalities are radically reduced and the economy expanded to satisfy the basic needs of the people and of the country as a whole.

Within the context of all the enormous changes a review of higher education should also be considered. In this regard Motala et al. (2003) note that reviewing higher education [with a view to merging some institutions] could be a step towards positively promoting the regional sharing of resources, including academic staff and libraries, eliminating wasteful duplication, and encouraging synergies between disciplines, universities and communities. Hay and Fourie (2002) identified various financial factors that necessitated the merging of higher education institutions. Various problems were experienced in the higher education sector. Some of the factors that contributed towards the problems in higher education according to Hay and Fourie (2002, p. 115) included in particular:

- the profound inequities and distortions of the system;
- incoherent and poor articulation between various types of higher education institutions;
- under-prepared students from poorly resourced socio-economic and academic contexts;
- unequal distribution of resources and subsidy amongst higher education institutions;
- declining state subsidy mainly as a result of poor economic growth;
- increased competition in the system from international and private higher education institutions in particular; and
- a decline in student enrolments.

Within the context of the identified factors that contributed to the problems experienced, various policies have been formulated that impacted directly or indirectly on the higher education environment. In the past few years virtually every state-funded higher education institution has been engaged in attempts to reposition itself in relation to the emerging policies of the new South Africa. Furthermore, many higher education institutions are struggling to survive in a context of financial

stringency, declining student enrolments and increasing competition. Amalgamation or merging with other institutions seemed to be the obvious solution.

The merging of higher education institutions is not unique to South Africa and as a matter of fact is also regarded as an international trend (Hay & Fourie, 2002). According to Rothmann and Viljoen (2002), the organisational transformation of higher education in South Africa includes revolutionary change (previous management practices and ways of doing things are discontinued); qualitative change (difficult to measure but relating to changes in the experiences of members of organisations); and multi-dimensional change (which affects all structures, processes and procedures and which requires changes in values, norms, attitudes, perceptions and behaviour).

Despite the contextual variables that influence the higher education sector the former minister of education, Kader Asmal stated that a rational, seamless higher education system that grasps the intellectual and professional challenges facing South Africa in the 21st century amongst others should be a priority (Motala et al., 2003). To address this priority, the merging of certain higher education institutions became inevitable.

The concept of "merging" in itself is rather controversial. Lang (2002) refers to a study of mergers in higher education, and highlights that a term like "merger" is widely used without precision and sometimes without accurate understanding. It is impossible to deal with all the variables that impact on the merging of higher education institutions. However, it is well known that people are the main role-players in the processes of merging higher education institutions. In managements' attempts to obtain common ground on variables that may impact directly or indirectly, positively or negatively on higher education, various psychological forces manifest themselves. Some of the psychological forces may be established intentionally whilst others may manifest themselves unintentionally. An imponderable number of variables may be involved in the equation of psychological forces, only a few of which may be active on a conscious level. The psychological forces may possibly also change according to the changes in the expectations and situations of the parties involved.

Lewin (1938) first formulated the conceptual properties of the construct of a force, as well as a definition to co-ordinate it with observable processes. The conceptual and dynamic relation between psychological forces, valences and tensions are discussed, as are theories concerning the relation between need, environment and the 'mechanics' of locomotion. Lewin (1938) indicates that one outstanding property of a force is its directedness. However, he states that direction in the psychological context cannot be defined as physical direction and cannot be determined by Euclidean geometry.

The future success of a merged university is likely to be determined by the level of willingness on the part of management to formulate their perceptions of and attitudes towards the psychological forces embedded in the processes of merging the different institutions.

In support of identifying the research problem it needs to be highlighted that no research could be found that related to identified "psychological forces" that exist during the merging of universities. Secondly, no attention has been paid in academic literature to the issue of psychological forces existing during the merging of universities. Thirdly, researchers largely studied staff perceptions that preceded- the (possible) merging processes of higher education institutions. Fourthly, research on the merging of higher education institutions has focused mostly on the inaccurate use of terminology during the merging processes. Hence a "merger" will typically be an extension of inter-institutional cooperation. Lastly, various researchers have published on issues in the merging of higher education institutions that relate to culture, finances and politics.

Information about the perceptions of and attitudes towards the thematic forces will enable management at all campuses of the relatively newly merged university to implement plans that contribute to the development of the merged organisation. The perceptions that those members of management involved in the merger had of the psychological forces that drove the merger processes of two universities and the incorporation of one campus of a third university were investigated. Furthermore, scientific information was also collected about how management (academic school directors, deans and vice-rectors) perceived the forces during the merger processes.

This information could be used to improve future relationships between the different campuses of this unitary university resulting from the merger.

1.2 RESEARCH OBJECTIVES

The research project is topical and of urgent importance in view of the fact that South African higher education institutions have already moved into the phase of merging, with some having advanced quite far. The possibility exists that various scenarios may unfold which may have definite influences on the future development of the university as an organisation. Secondly, the data obtained could become part of a managerial instrument enhancing synergy between the different campuses involved in this study.

1.2.1 General objectives

With reference to the above formulation of the problem, the general aim of the study was to investigate the forces embedded in the merging of The Potchefstroom University for Christian Higher Education, the University of North West (in Mmabatho) and the incorporation of the Sebokeng campus of the VISTA University.

1.2.2 Specific objectives

The specific objectives of this research were:

- to conceptualise some psychological forces within the context of merging higher education institutions from the literature by considering the various aspects, as well as through qualitative investigation;
- to determine the perceptions and attitudes of academic school directors, deans and vice-rectors at the selected institutions' campuses towards the thematically identified psychological forces in a quantitative manner; and
- to make recommendations on how the psychological conceptualisation of forces could be utilised in the future development of the newly established unitary university.

1.3 RESEARCH METHOD

The research method consisted of a literature review and an empirical study.

1.3.1 Literature review

A literature study was conducted in order to focus on previous research. A brief overview was given of how these forces were conceptualised in the literature and of the possible relationships among them.

1.3.2 Empirical study

1.3.2.1 Research design

In the first article (chapter 2) a qualitative exploratory and descriptive design were used to identify items that could be used in the questionnaire. The questionnaire was used in a quantitative survey (chapter 3). The information collected by means of the quantitative instrument was also used to assess interrelations among constructs within the target population.

1.3.2.2 Participants

The former vice-chancellors of the two main merging institutions, namely Potchefstroom University for Christian Higher Education and University of North West were included qualitatively to assist in determining the psychological forces experienced that were embedded in the processes of merging the two main entities (Chapter 2). Furthermore, all former and existing vice-rectors¹, deans and academic school directors were included in the quantitative part of the survey (Chapter 3).

¹ No feedback was received from any vice-rector.

1.3.2.3 Data analysis

Notes were taken and an audio recording was made of the extensive but informal interviews that were conducted in a relaxed environment with the two former vice-chancellors. The interview schedule was constructed on the basis of the initial literature survey. However, a phenomenological approach was followed to try and understand the data that were provided from the perspective of the participants.

It is presumed that, because of the variety of contexts, the issues with which this research is concerned would become clouded if the particularistic context of a certain university was reflected here. For this reason, only the findings pertinent to this research that relate to psychological forces were outlined. The interviews were transcribed verbatim and checked by two independent transcribers. Content analysis was used to analyse, quantify and interpret research data systematically and objectively.

The quantitative data analysis was carried out by means of the SAS program (SAS System for Windows Release 9.1 TS Level 1M0, 2002-2005). Cronbach alpha coefficients, inter-item correlation coefficients and confirmatory factor analysis were used to assess the reliability and validity of the quantitative measuring instrument (Clark & Watson, 1995). Descriptive statistics (e.g. mean, standard deviations) were used to analyse data. The practical significance of differences (*d*) between construct means were also determined (Cohen, 1988).

1.4 DIVISION OF CHAPTERS

In Chapter 1, a brief overview was provided of the problem statement, the research objectives and the research design. In Chapter 2, the conceptualisation of forces in the merging of two universities are reported. This is then followed by Chapter 3, which in turns focuses on a thematic analysis of cognitive, affective and conative expressions of senior academics in the merging of two universities. Chapter 4 gives a summary of the conclusions, and discusses research shortcomings and recommendations.

1.5 SUMMARY

This chapter focused on the problem statement, objectives and research method of this study.

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CHAPTER 2

ARTICLE 1

CONCEPTUALISATION OF FORCES IN THE MERGING OF UNIVERSITIES

ABSTRACT

The purpose of this study was to analyse the responses to questions concerning their experiences of former vice-chancellors who were actively engaged in the merger of two universities. Their respective experiences of the forces behind the merger were qualitatively explored, documented and then thematically grouped into the following categories: *government, management, council, culture, peers, students and alumni, strategic direction* and *resources*. It was evident that government was perceived as autocratic, leaving the most difficult part of the merger to the former management teams who, in collaboration with their councils, had to struggle to identify a strategic direction for the forced merger. When some trust developed between negotiating stakeholders, calm was ensured when it was mutually decided that each campus would have its unique culture, although it was realised that the government would perhaps oppose the idea. Concerns were expressed about resource limitations of the merger.

OPSOMMING

Die doel van hierdie studie was om die response op vrae betreffende die ervarings van voormalige visekanseliers wat aktief by die samesmelting van twee universiteite betrokke was te ontleed. Hul onderskeie ervarings van die kragte agter die samesmelting is kwantitatief ondersoek, gedokumenteer en daarna tematies in die volgende kategorieë gegroepeer: *regering, bestuur, raad, kultuur, eweknieë, studente en alumni, strategiese rigting* en *hulpbronne*. Dit is duidelik dat die regering gesien is as outokraties, en dat hulle die moeilikste deel van die samesmelting oorgelaat het aan die voormalige bestuurspanne wat, in samewerking met hul rade, moes worstel om 'n strategiese rigting vir die gedwonge samesmelting te identifiseer. Nadat 'n mate van vertroue tussen die onderhandelende belanghebbendes ontwikkel het, is kalmte verseker toe daar onderling ooreengekom is dat elke kampus hul eie unieke kultuur sou hê, hoewel daar besef is dat die regering moontlik teen die idee gekant sou wees. Bedenkinge is uitgespreek oor die hulpbronbeperkings van die samesmelting.

Mergers in higher education have attracted a large deal of international scholarly interest, possibly because of the way governments have used mergers to effect systemic change, and also because of the way institutions that are affected react to these pressures². Structural issues, procedural, and linkage arrangements, typologies, leadership and management of mergers have received their fair share of treatment in higher education literature (Kay, 2002, p. 92). While there is no single prescribed method to ensure that mergers in higher education are managed successfully, there is much to be learned from the experiences of senior managers, such as former vice-chancellors, where new institutions were formed.

The founding policy document on higher education after the 1994 elections has been the report of the National Commission on Higher Education (NCHE): *A Framework for Transformation*, which was produced by 13 commissioners whose terms of reference included advising the Minister on the shape or types of institutions and what the size of higher education should be (NCHE, 1996, p. 226). Faith was expressed in statutory regional structures that could be consulted on the planning needs of the region, mergers and rationalisation (NCHE 1996, p. 198). The subject of mergers in the NCHE report is dealt with in the context of teachers' training colleges. The emphasis of this report was not on University mergers but rather on institutional differentiation (Jansen, 2002). It was only in July 2000 that the Council on Higher Education (CHE) Task Team advanced a number of recommendations on the size of the system in relation to the number of institutions, closures, combinations and funding. The team furthermore provided examples of possible combinations that could create a more rational and coherent higher education landscape (CHE, 2000, p. 51). In March 2001 the Minister appointed a National Working Group consisting of 11 persons from business, labour, higher education and government, which released a report in December 2001 and recommended the reduction of higher education institutions from 36 to 21 through the specific mechanism of mergers, listing the specific institutions in various provinces to be targeted for merging (DoE, 2002, p. 4).

The researcher's interest in this subject stems from experience as a lecturer in higher education over the last 16 years. During this time a vast amount of change

² Pressure is exerted by a force

took place in South Africa in general and in higher education specifically. Although a wealth of research exists regarding the concept of mergers, the subject of mergers of higher education institutions and the accompanying forces have received very little attention. It represents an area that could make a highly useful contribution to a range of subjects, such as the development of future strategies for the managerial and governance teams involved in mergers in higher education. In order to maintain momentum in a merged higher education institution and to protect all stakeholders it is vital to determine how a selection of stakeholders experienced a merger of two higher education institutions.

In general an investigation into the levels of job satisfaction is of the utmost importance due to the fact that employees spend most of their life at work (Gruneberg, 1979; Kontrak et al., 1992). Owing to the changes in higher education and the forces exerted upon higher education institutions, there is a need to determine what these forces could include and how they are experienced or perceived by the employees concerned. The future success of any merged higher education institution is also likely to be determined by the level of willingness on the part of management to formulate their perceptions of and attitudes towards the forces embedded in the processes of merging the different institutions and to plan appropriate management interventions based on this information. However, there is evidence that due to the merging of higher education institutions an exodus of academics is already being experienced, mainly due to a lack of financial resources, resulting in doubt regarding stability and the sustainability of standards (Smit, 2005). It therefore seem, that a study of the conceptualisation of forces in a merger of universities could assist management to plan appropriate interventions to enhance and protect job satisfaction during the possible instability evoked in a merger.

The way in which clusters of academics, management and those responsible for governance, experience mergers may differ. How the move towards mergers was conceptualised and experienced by the various parties affected remains unclear. It is assumed that some sort of force(s) was (were) experienced by clusters of people working in those higher education institutions that had to merge. These forces could

possibly be directly related to their³ respective affective (emotional), cognitive (understanding) and conative (acting) dispositions. Consequently one could therefore refer to what is known as psychological forces.

The research problems can be summarised as follows: Firstly, no research could be found that relates to identified psychological forces that exist during the merging of universities. Secondly, no attention has been paid in academic literature to the issue of psychological forces that exist during the merging of universities. Some research on the merging of higher education institutions has focused on the inaccurate use of merger-related terminology during the merging processes, hence that the result of what is often referred to as a "merger" is typically often just an extension of inter-institutional cooperation. Lastly, various researchers referred to later in this article have published on issues in the merging of higher education institutions that relate to culture, finances and politics.

Information about the perceptions of and attitudes towards the psychological forces will enable management at all campuses of the merged university to implement plans that contribute to the growth, development and hence performance of the merged university.

The perceptions that the management involved have of the psychological forces that drove the processes in the merging of two universities and the incorporation of a campus of a third university were investigated. Furthermore, scientific information was also required about how management perceived the psychological forces during the merging processes. This information could also be used to improve future relationships between the campuses of the merged university and to provide useful baseline information to managers in contextually similar future mergers.

Psychological forces in higher education

The meaning of "force" in the human and social sciences is diffuse and controversial. It has a broad range of meanings, and can include positive or negative perceptions

³ Respondents

related to the type of force experienced or observed. The context in which a force is experienced or observed could possibly also influence the psychological conceptualisation of the force.

Lewin (1938) first formulated the conceptual properties of the construct of force as well as a definition co-ordinating it with observable processes. The conceptual and dynamic relation between psychological forces, valences and tensions are eminent. Lewin (1938) indicates that one outstanding property of a force is its directedness. However, he states that direction⁴ in the psychological context cannot be defined as physical direction and cannot be determined by Euclidean geometry.

Concepts or constructs⁵ that also relate to force can be regarded as intervening, dynamic or even genetic concepts. Terms such as force, energy, momentum and gravity are names for phenomena that cannot be directly perceived but that are properties representing certain types of reaction or behaviour. The existence of such states cannot be directly "seen", but must be demonstrated by "manipulation". One outstanding characteristic of a force is its directedness – but in the psychological context it cannot be defined as physical direction (Lewin, 1938).

Higher education cannot escape major and sometimes difficult change, and governments are determined to lead those changes, rather than be driven by them (Giannakou, 2006). Giannakou (2006) is furthermore of the opinion that reforms in higher education should specifically focus on funding, a clearer focus on what students learn, responsiveness and diversity, research and innovation and, finally, migration and internationalisation. Curri (2002) states that to achieve change in a higher education environment more than the factor must be present. Curri (2002) also established an inferred relationship between leadership, restructuring, managing staff relations, organisational development, external pressure for change and organisational change. Curri (2002) developed the "primary triad model", suggesting a holistic approach to achieving desired change outcomes. Otherwise change may be perception rather than the reality (Curri; 2002, p. 133). Changes in the work environment, in this case higher education, could influence job satisfaction.

⁴ Determined by force

⁵ Construct can refer to cluster or grouping of concepts

Coetzee (1998) postulates that job satisfaction could be linked to behaviour that serves as an indicator of positive organisational behaviour.

Since the late 1980s, when it first became evident that an end to apartheid was inevitable, the South African higher education system has been subjected to enormous changes. Some of these changes have resulted from legislation enacted by the democratic government elected in 1994. Other changes, however, have arisen as a result of pressures at a global level which now impact on South Africa as a member of the international community, and yet more result from social and economic shifts within the country itself (Boughey, 2004).

According to Wolpe (1995), the election victory of the African National Congress (ANC) in 1994 marked a dramatic and indeed, to a limited extent, a revolutionary transformation. It was revolutionary in the sense that stable institutions of democratic and representative government have been established, and limited in the sense that parliamentary structures apart, the institutional and social structures generated in the apartheid era at the time remained largely intact. Wolpe (1995) furthermore argues that the central developmental task facing the country turns precisely on the strategies to be followed in order to change these institutional and social-structure conditions so as to bring about a democratic social order in which race and gender inequalities are radically reduced and the economy expanded to satisfy the basic needs of the people and of the country as a whole.

Within the context of all the enormous changes a review of higher education should also be considered. In this regard, Motala et al. (2003) note that reviewing higher education [with a view to mergers] could be a step towards positively promoting the regional sharing of resources, including academic staff and libraries, eliminating wasteful duplication, and encouraging synergies between disciplines, universities and communities. Hay and Fourie (2002) amongst others identified various financial factors that necessitated the merging of higher education institutions. Various problems were experienced in the higher education sector. Some of the factors that contributed to the problems in higher education according to Hay and Fourie (2002, p. 115) included amongst others: the profound inequities and distortions of the system; incoherent and poor articulation between various types of higher education

institutions; under-prepared students from poorly resourced socio-economic and academic contexts; unequal distribution of resources and subsidy amongst higher education institutions; declining state subsidies mainly as a result of poor economic growth; increased competition in the system from particularly international and private higher education institutions; and a decline in student enrolments.

Within the context of the identified factors that contributed to the problems experienced, various policies were formulated that impacted directly or indirectly on the higher education environment. In this regard Jansen (2002, p. 1) correctly points out the overt aim of government to use levers such as policy and funding to effect change in Higher Education. He points out that he is uncomfortable about planners and policymakers in the sense that almost every official government document vests enormous authority in policy and planning instruments to "steer" higher education institutions, and specifically to steer the higher education system towards desired national goals. Jansen (2002, p. 1) furthermore highlights the profoundly positive ambitions of the National Plan for Higher Education by quoting the Ministry of Education as stating the following: "The National Plan indicates the strategies and *levers*⁶ through which the framework and system-wide targets and goals...*will be achieved*. The planning process in conjunction with funding and an appropriate regulatory framework will be the main *levers* through which the Ministry will ensure that targets and goals of this National Plan are realised."

In the past few years virtually every state-funded higher education institution had engaged in an attempt to reposition itself in relation to the emerging policies of the new South Africa. Furthermore, many higher education institutions were struggling to survive in a context of financial stringency, declining student enrolments and increasing competition. Amalgamation or merging with other institutions seemed to be the obvious solution (see Hay & Fourie, 2002; Jacobsz, 2004).

The merging of higher education institutions is not unique to South Africa; it is also an international trend (Hay & Fourie, 2002). According to Rothmann and Viljoen (2002), the organisational transformation of higher education in South Africa

⁶ Leverage enacted by a force

includes, most importantly, revolutionary change (previous management practices and ways of doing things are discontinued), qualitative change (difficult to measure, but meaning changes in the experiences of organisational members) and multi-dimensional change (which affects all structures, processes and procedures and which requires changes in values, norms, attitudes, perceptions and behaviour) (also see Steyn, 2007, p. 16).

Despite the contextual variables that influences the higher education sector the former minister of education, Kader Asmal stated that a rational, seamless higher education system that grasps the intellectual and professional challenges facing South Africa in the 21st century, amongst others, should be a priority (Motala et al., 2003). To address this priority, the merging of certain higher education institutions became inevitable. The change, however, is experienced as painful, as reflected by Kgosana (2005, p. 21) in his remark that *"students at the University of Limpopo⁷ and the University of KwaZulu-Natal⁸ abruptly ended the merger honeymoon as they reminded the powers that be, that despite the new identities, the problems of old still existed at these institutions"*.

The concept of "merging" in itself is rather controversial. Lang (2002) refers to a study of mergers in higher education, and highlights that a term like "merger" is widely used without precision and sometimes without accurate understanding. It is impossible to deal with all the variables that impact on the merging of higher education institutions. However, it is well-known that people are the main role-players in the processes of merging higher education institutions. In managements' attempts to gain common ground on variables that may impact directly or indirectly, positively or negatively on higher education, various psychological forces manifest. Some of the psychological forces may be established intentionally, while others may manifest themselves unintentionally. An imponderable number of variables may be involved in the equation of psychological forces, of which only a few may be active on a conscious level. The psychological forces may possibly also change according to the changes in the expectations and situations of the parties involved.

⁷ Merger between University of the North and Medunsa

⁸ Merger between University of Natal and University of Durban Westville

The way in which an employee perceives his/her primary work environment could be shaped by inner dialogue, as influenced by organisational climate. The organisational climate in turn ensures immediate external conversation. This is influenced by the organisational culture, which provides background to cultural conversation (Gallwey, 2001). As stated, terms such as force, energy, momentum and gravity are names for facts which cannot be directly perceived but which are properties representing certain types of reaction or behaviour. They cannot be directly "seen"...but must be demonstrated by "manipulation". The outstanding direction of a force is its directedness, but [in this case] only in psychological context (Lewin, 1938).

When linking the concept of force to higher education institution mergers, Jansen (2002, p. 2) is of the opinion that research has not paid sufficient attention to the comparative process and effects of institutional combination when very different kinds of institutions were merged in the same social context. It is assumed rather that the forces governing mergers, and the effects that emanate from them, are institutionally blind. Jansen's reference to "the forces governing mergers" is interesting in the sense that nobody else dared to refer to forces involved in the merging of higher education institutions. Trying to accurately identify or even group the forces involved in the merging of higher education institutions is extremely difficult. The scope and length of this article furthermore limits the researcher's ability to elaborate on all possible forces. Shifting and changing conditions and expectations vary the amount of influence any force can have on the merger at any one time.

We have been taught that education is the responsibility of the state, with strong local control (governance). We also know that the national government's influence increases whenever there is a real or even perceived problem to be solved with the assistance of the education system, in this case with the assistance of the higher education sector. Various agencies exist, such as university senates, managements, councils, provincial governments, national government, national and international accrediting agencies and professional organisations. The list is almost endless, directly or in-directly, almost every individual, interest or professional group, industry and political groupings may also influence the higher education environment. By

grouping the interacting forces according to their interests in higher education, it is possible to see their varying strengths or influences, and hopefully provide a method by which present and future forces can be recognised more easily.

It is well known that government has quite a large influence on the financial stability of higher education institutions. Without subsidisation of public higher education institutions from the fiscus, they will not be able to continue to offer services. Government's further influence in the compilation of university councils also becomes a force to be reckoned with. Forces can possibly be grouped into three areas, on the one end of the continuum those caused, created or influenced by government, that oversees higher education with a legalised governance role, and on the other end those related to steering or management of the institution. Between the two main forces a variety of forces may occur that are influenced in some or other way by the two forces at the ends of the continuum. This could also contribute to a fair amount of power play between the opposing ends of the continuum, governance and management, and all of those in between. Figure 1 can be used to illustrate the placement of, and hence relationships among, the various forces. If the perceptions of the staff working at the university coincide with those related to either governance or management, it would be reasonable to "rank" the forces influencing the success of any merger environment. Governance authorities create and legally influence the environment in which university management and hence academic staff has to work and perform.

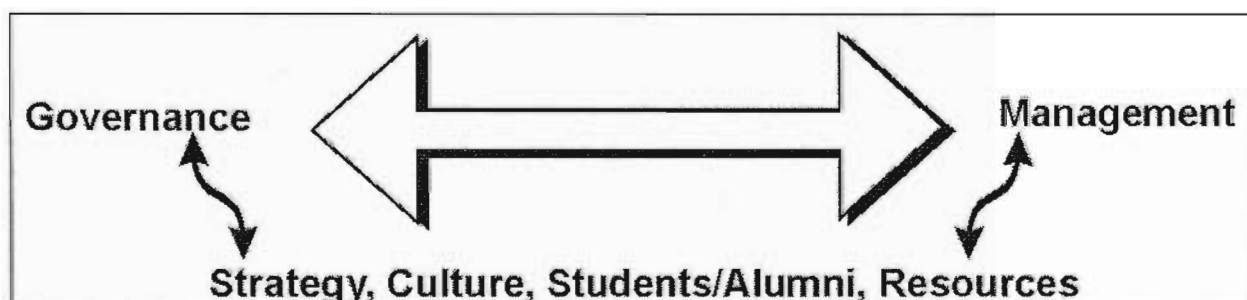


Figure 1. Forces in higher education institutions

METHOD

Research design

A qualitative design (interviews) was used, as this was an initial exploratory study to describe the experiences of two former university vice-chancellors involved in a merger. Qualitative research is particularly useful for studying phenomena or events about which little is known (Field & Morse, 1985). In this way items were identified that could be grouped into main themes. Semi-structured interviews were conducted with both participants. This qualitative design was used to identify items that could be used in questionnaires that resulted in quantitative data, the latter being reported in another chapter (article). Personal interviews as a method of data collection hold a number of advantages:

- it is well suited to the exploration of attitudes, values, beliefs and motives (Smith, 1975);
- it ensures that the respondent is unable to receive assistance from others while formulating a response (Bailey, 1987); and
- it provides the opportunity to evaluate the validity of the respondent's answers by observing non-verbal indicators (Gordon, 1975), which is useful when discussing such a sensitive issue as the merger of universities.

Although each force on the merging agenda constituted an integral part of the merging process, this research focused on consolidating these forces into categories of themes. The research questions were designed to collect data on the type of forces and how they were experienced. The widely acknowledged response rate obtained with these interviews was a consideration. Perhaps the face to face contact with the researcher could motivate respondents, who would otherwise not bother to complete a questionnaire, to participate.

Initial contact with each participant was made through a personal letter explaining who the researcher was and the purpose of the research project. A contact

telephone number and e-mail address were provided, in case more information was required. A convenient time was arranged for the interviews.

Participants

The data were collected from two vice-chancellors of previously autonomous universities who merged to become what is referred to as a merged university. The respondents comprised one Afrikaans-speaking male and one Sepedi-speaking female, both in their late forties. The interviews were conducted in July 2004, seven months after the merger had taken place. The purpose was to analyse the opinions of the two most senior officials who have been actively engaged in a merger. The participants had experience of being vice-chancellors at two separate, autonomous universities. Both participants at these universities were directly involved in their institutions being merged to become one. One participant was from an "historically disadvantaged higher education institution" (HDI) and the other from a "previously advantaged institution" (PAI). Interviews were conducted in private settings, namely the respondents' offices.

Data collection

Semi-structured interviews were selected as the means of data collection because they are well suited to the exploration of the perceptions and opinions regarding complex and sensitive issues, and enable probing for more information and clarification of answers. The personal histories of the two respondents precluded the use of a standardised interview schedule.

Gordon (1975) argues that the wording and sequence of all the questions in a standardised interview are exactly the same for each respondent so that one can be sure that any differences in the answers are due to differences among the respondents rather than in the questions asked. The objective is to standardise the stimulus (Mann, 1985). Implicit in this reasoning is that both respondents share a common vocabulary and that every word has the same meaning to every respondent (Denzin, 1989). In contrast, the opportunities to change the words but not the meaning of questions provided by a semi-structured schedule acknowledges that not

every word has the same meaning for every respondent and not every respondent uses the same vocabulary (Treece & Treece, 1986)

In establishing the questions for this study, two main points were addressed:

- how the questions should be formulated, and
- what the role of prior knowledge was.

A conceptual framework already existed in the mind of the researcher, i.e. prior knowledge and experience of the subject matter, and the initial literature study to engage in this research. This conceptual framework could have limited the interview and reduce its potential depth, rather than the methodology. The researcher's experience was shaped by working at two higher education institutions⁹ in the last 16 years in South Africa.

The respondents varied in their reactions to the questions – sometimes positive, sometimes negative; sometimes placing their comments in the public domain, sometimes regarding their views on the matter as completely confidential (therefore not reported); sometimes the two respondents were at different ends of the scale; sometimes they were in agreement. The methodological approach needed to situate an enquiry into specific individual viewpoints within an objective and neutral investigative framework. This phase of the work had demonstrated the inestimable value of speaking to senior managers directly in their own environments.

Data analysis

The audio-recording of the interviews was permitted and this has ensured that an identical replication of the contents of each interview was available to facilitate analysis. The researcher listened to each tape, transcribed it and then read each transcript several times to familiarise himself with the data. In the initial stages of data reduction each line of the interview transcriptions was numbered according to the question number it related to in the interview schedule. Because of the

⁹ An historically black institution, and an historically white institution.

complexities of the human thought processes, certain lines of data overlapped and referred to more than one question. A folder was produced for each question on the interview schedule. Once coded, all the interview transcripts were "cut and pasted" into relevant question sections and filed into the appropriate question folder. The researcher also kept an original hard copy of each transcript close at hand so that in the case of any of the passages he could refer back to the original section in the transcript to ensure that all comments were being analysed in context.

This provided insight into the performance of both the respondents and the interviewer. Furthermore, access to the nuances of the interactions between respondents and interviewer (e.g. intonations, pauses) helped validate the accuracy and completeness of the information collected.

The audio-taped interview data were analysed and grouped thematically into eight groups of forces,¹⁰ namely government, university management, university council, peers on other campuses, students and alumni, strategy, culture, and resources.

By using a grounded research method and more than one method to investigate the phenomenon, it was hoped to enhance the validity of the findings (Jick, 1979). Reliability is defined as the degree of consistency or dependability with which an instrument measures the attribute it is designed to measure (Polit & Hungler, 1991). In qualitative terms, this refers to the consistency, repeatability, or stability of a study in terms of the clarity and accuracy of the final research report (Lincoln & Guba, 1985). This study emphasises the uniqueness of human situations and the importance of experiences that are not necessarily accessible to validation through the senses (see Sandelowski, 1986).

Applicability in qualitative terms is related to external validity in quantitative research (Appleton, 1995). The descriptive interpretation which results from the analysis of the obtained data should apply to other areas as the aim of this article was to produce a rich database in order to gain understanding of the concept and experience of forces in or behind mergers. In fact, since completing the investigation the author has had

¹⁰ Respondents randomly referred to present, past and future thematic scenarios

the opportunity to discuss some of the findings with senior officials working in a number of different merger environments and certainly the interpretation of the analysis does appear to be mirrored in other cases.

Specific strategies have been identified to ensue the applicability and truth value of this qualitative study to reduce the threat of "elite bias", that is "overweighing data from articulate, well informed, usually high status informants" (Miles & Huberman, 1984) and the threat of "holistic fallacy" which can occur as the researcher becomes more certain that his conclusions are correct (Burns & Grove, 1987; Miles & Huberman 1984).

RESULTS

Table 1 provides an overview of the thematic grouping of identified forces and findings derived from the feedback of respondents in their approach to the merger.

Table 1
Summarised Findings in Approach to the Merger

Theme or type of force	Act of force	Finding
Government	Power enforced	Not collaborative but autocratic by constructing both the game and rules with no clear educational motive. As an irresistible force with the juridical base they enforced transformation and development with political correctness. Respondents were disoriented, angry and frustrated and could do nothing about the government's decision except than to manage it. This is due to an inappropriately exploited political power base that made the merger unavoidable. Although the minister of education had little empathy with the position of the respondents' constituencies, the possibility of improved university management was envisioned.
Management	Limited momentum	Different negotiating styles negatively impacted on the impetus towards merger implementation.
	Opposing directions	Much tension and conflict surfaced in a stormy start between the two former management teams due to a lack of trust and possible prejudice due to the enforced nature of the negotiations.
	Equilibrium	The negotiations were utilised as a tactical weapon and hence turned the negativity into a relationship of trust.
Council	Limited resistance	The respective councils had to accept the merger by assisting the relevant management teams in managing the merger.
	Power Limited direction	The new council appeared not have been composed according to agreement but according to the government's agenda and authority. This possibly led to limited direction with the merger six months into it.
Peers	Psychological distance Tension	Peers on campuses had reservations about the merger, causing a psychological distance due to differences associated with institutional culture and values. Reference to "Potchification" ¹¹ on the Mafikeng campus contributed to tension; however, leadership ensured that tension was limited and that peers on campuses collaborated.
Students and Alumni	Direction	No reference was made to existing students but only to the future breed of students emanating from the merger. Alumni had limited reservations about the direction of the merger.
Strategy	Direction	Much difficulty was experienced in deciding on a merger strategy, both before the merger and even six months into it. Staff had to support the strategy and their behaviour was driven by conviction.
Culture	Direction	Many differences were highlighted in terms of campus cultures. Acceptance of unique campus cultures brought calm, but with the reservation that government would not be satisfied.
Resources	Strenuous	The ability to ensure sufficient resource provision within an expensive merger context was flagged as a potential restraining factor.

Government

The way in which the government conducted and facilitated the decision to merge institutions appeared not to be collaborative but rather autocratic. The use of

¹¹ Mafikeng staff use the word "Potchification" in a negative sense, implying that all initiatives on the Mafikeng campus were driven to ensure compliance with the Potchefstroom campus agenda.

government's *power* and *authority* to *enforce* the merger was clearly emphasised by the respondents, and it was something that had to be accepted as a political "*fait accompli*". One respondent remarked that "*it was both political and perhaps economical*" reasons that underpinned the initiative to enforce mergers.

The existence of an investigative body into mergers for higher education institutions (HEI) only became apparent to the two respondents after the announcement of a so-called government report. On the question when they became aware of the fact that the two universities had to merge, both respondents mentioned that they were quite surprised by the release of the so-called report in July 2002. For them "a new game with new rules were being created by government-appointed and -selected role-players". More specifically, the minister of education conducted the selection process. Both respondents were of the opinion that neither of them had been consulted in the compilation of the report concerned nor in the period following the release of the report.

Both parties realised that the force exercised by government to merge the two universities could not be resisted. The respondents' direct feelings about the government as a possible political force were expressed by referring to the intentions of government to do away with the ghosts of apartheid and former "black universities". In this way "transformation" and "development" were clearly to be facilitated by *force*. It is clear from the respondents that no clear educational motive existed for the *forced* merge. At first it was thought by both parties that they would not be involved in any merger because of the fact that the campuses were isolated and physically removed from each other. Emphasis has been placed on this by respondents with comments such as "*we are not going to benefit from this merger...but we do it for the benefit of those who come after us*", "*there were no clear educational reasons for the merger to take place*" and "*as a political force the government wanted to transform former white universities and do away with black universities...the government had both the power and juridical base to do this...*" and "*the noise that came out of their first report, shook the country*".

One respondent was unequivocal that the minister of education had not been sensitive enough about issues related to the merger and that the "*voice of the*

institutions were not heard." It was mentioned and accepted that no political or juridical change could be expected to alter governments' decision to merge the two universities. Emphasis was also placed on the fact that some historically black universities had used political influence and pressure to avoid mergers.

The government's merger initiative never appeared to be an attractive option for any of the respondents. One respondent commented as follows: *"It was clear that the merger was coming, yet you did not want to think about it, until it was on your doorstep..."* Another respondent said: *"...when the ministry announced that there were going to be a change of landscape...the higher education landscape has to change...this started to make people think about what the results could be..."*

The way in which the government working group conducted both the investigation and the eventual announcement of the mergers was not experienced positively by the respondents. The fact that they were not consulted by the working group caused both to be *disoriented* as regarded exactly what was going on.

When asked what their experiences were after they had seen the provisional reports of the government working group they responded with: *"anger and frustration...the vision I had for my institution was destroyed...this made me angry... Further frustration was brought about by the mere thinking of change"* and *"Lord, give me the strength to change the things I can, the patience to accept the things I cannot, and the wisdom to know the difference."*

It was clearly mentioned that some former black universities had the political background and power base to ensure that they did not have to merge, while former white universities had no political power base to avoid a *forced* merger. A *political agenda* seems to have been the *force* that had to determine which institution had to merge with which.

Both respondents experienced the announcement of the final merger decision quite negatively. Responses such as *"It was a threat to myself, in my career, in the sense that I now had to do things differently. I now had to adjust my vision to all the changes... but also a threat that... that I started to feel from the people"* and *"I was*

negative, but I have studied it all and accepted the Biblical prescription to work from there. It was clear that this merger announcement was not comparable with those of companies where it is clear who gained market shares... and this is an advantage and that... this was not that kind of merger... this was in fact forced down on us. It took me some time to accept this but after accepting it I knew I could do nothing to overturn this [government] decision but to manage it." The assumption that free mergers are "better" should be problematised. Even in "willing" mergers the people on the "ground" might experience it as "forced".

The working group appointed by the minister of education to investigate the merging of higher education institutions was clearly experienced by both respondents as a driving force to reckon with, revealed in remarks such as *"they were a force, they influenced the thinking of people, and the noise that came out of their first report, shook the country... politically it had to happen"* and *"political correctness of the day ensured that transformation was put in front"*. One participant mentioned that *"my attitude started to change after the shock [of the merger announcement], I sat back and said, what could be the reasons, these are the reasons... that they are giving, and they are making sense to me..."*

The method used by the minister of education to overturn the structures of the former autonomous universities was experienced as a force in the sense that the minister made it clear to one respondent that he would have liked to close down the other potential merging partner but that politically he could not. The same respondent was of the opinion that the minister could have said the same words to the other merging partner. In this way the minister ensured a melting exercise and forced transformation on both institutions. *"Politicians always play two cards – on the one hand the governments' political transformation and on the other hand... improved management for both campuses"*.

It was indicated that government had some managerial reasons why they wanted to enforce the merger, but it was evident and clear that the politics of the day and political correctness had transformation as its main agenda. The one university could have been closed down due to managerial problems whilst the other had to be transformed. Rationalisation was explicitly mentioned. A respondent said that

"politicians [would] always play two sides". Therefore by merging the two, it made some managerial sense. These government interventions were experienced as "external forces"¹². It was stated that the Potchefstroom campus was not loved by too many people so that politically the interventions were acceptable.

University management¹³ and council¹⁴

The initial negotiations between the two management teams were not experienced as very progressive due to the differences in negotiation styles. It was mentioned that one campus management had decided to open the negotiations to other staff members that do not form part of management. This in turn was experienced by the other campus as very disruptive and frustrating, in the sense that little progress could be made: *"A stormy start"*. Much tension and conflict surfaced due to the "opening up" of the negotiation phase. One participant verbalised the experience as follows: *"There were moments of great, great tension. During combined councils, well single council, I'll talk about my own previous council... in task teams... there were, very, very, interesting moments of tension"* and *"I didn't have to modify my behaviour, and I have thought about it, and I said it wouldn't be fair because I'll be pretending. I want people to know me as I am... the people ... on the other side ... for me it was very guarded. It was like we... to a certain extent, we shouldn't do certain things because they might be perceived as bad or as racist or as this or as that. I just got that feeling that, when we started, most of them were very guarded on their behaviour"* [because] ... *"we were two very different institutions, where one was a totally black institution, historically disadvantaged, and the one was a white institution, fairly advantaged as compared to the other one. Some of them was very, very conservative... conservative in the sense of keeping things as they are... it was like... the merger makes... makes us lose what we actually are, and at times, one would have a feeling of... here we are... we have to take over this burden, the merger makes us a burden to the other side.... but our approach towards each other has grown...has changed."*

¹² Reference was also made to so called internal forces

¹³ Reference is made to the previous University campus managements and the existing new Institutional Management

¹⁴ Reference is made to the previous two University Councils and the new Council at the time (2004)

The other respondent remarked, *"I experienced these negotiations as conflict generators" and "the other parties were very suspicious, did not trust us at all...and somewhat belligerent by saying...you cannot come and tell us what to do...but I think we felt the same. This was a typical negotiating situation, where it is forced down upon you, none of us wanted this, but it turned out to be our strongest weapon...but the moment we overcame this hurdle we were very convinced what we really wanted to do and how we had to collaborate...."*

One respondent mentioned that it was impossible to act as facilitator, otherwise their [internal] support base would have been lost. A new role had to be adopted which required a strong stance.

The announcement of the merger evoked much debate on the campuses. Debate centred around values, the value of language, and the quality of teaching, learning and research. Furthermore, it was not clear whether financial and educational sustainability could be ensured through the merger. Members of senior management could not identify any advantages to merging. All the advantages linked to the merger were of a political nature, like *improved funding and broader acceptability*. A definite negative force was presuppositions. People were unsure. They first needed assurance and some form of security. Although people did not like what they had heard, they knew what was going on and could progress from there. This made the members of management of the one university decide to show the government that the merger could work. It became a positive driving force that positively influenced the merger outcome.

Both parties experienced a certain amount of fear while they broke the news (of the merger decision) to their respective management teams and councils. Much resistance was experienced by both respondents. Reference was made to *"hours of consultation, negotiations, meetings and fighting with senior management, extended management committee, which included the deans, and council to ensure a balance between what we are able to change and what we are unable to change and what we want to change and what we do not want to change."* Eventually the management team and council concerned were given a 48 hour deadline to make a final decision on how they were to approach the government announcement that a

merger was in the pipeline. Constant focus was only ensured by the thought that nothing could be done to overturn this *government decision*, it simply had to be accepted and managed.

One participant remarked that it took a while to convince the management teams (at the time) that it (the merger) had to be done in the best possible way. A focus on what was regarded as "*really important*" was encouraged. Some issues were then flagged as so-called *prerequisites* before the merger could be considered. The important issues were clearly identified as the academic level of teaching-learning and research, values, language, good management, and financial and educational sustainability.

During an engagement with the members of extended management on the one campus, which included deans and directors, they were asked by the vice-chancellor to list the advantages of the merger. Initially only disadvantages could be listed, but after a while some advantages were identified, the majority of which were politically related: to be more acceptable, to be a broader university, to have improved access to funds and to offer a wider variety of subjects and disciplines. It was mentioned that these things were clearly experienced as a positive driving force. "*We wanted to show the world that what they thought would not work is in fact going to work and that this positive force should not be underestimated*".

Clear reference was made to existing barriers in management structures, namely the imbalances in terms of race, gender and the language issue. However, it was mentioned that this was something that could be coped with whilst capacity was developed to overcome these barriers.

One respondent remarked that, "*I won't say that we have reached an equilibrium [with regard to merger issues], but the one thing that I am comfortable with, is the issue of trust*". The other respondent remarked that the positive forces of effective management are balanced with the necessity of transformation, equity and efficiency.

One campus' management and eventually its council also supported the issues that were clearly identified, namely the academic level of teaching-learning and research. Furthermore, values, language and good management were highlighted as really important issues that had to receive attention in the merger.

With the appointment of the new council it was eminent that the minister of education would appoint his candidates and that the 50:50 principle [of equal representation from each campus] would not really be adhered to. This was proved by the appointment of four candidates who clearly supported the Mafikeng campus, while only one person who supported the Potchefstroom campus was appointed by the minister.

The following response indicates that some force was experienced to "embrace" the merger: *"One would say that those who did not like it, were forced to like it"*. It was also clearly stated although being enforced, if perhaps the different campuses could work together with clear outcomes in mind, it was achievable. This is illustrated by the quote *"... but it may actually not be a forced thing, if we work together, perhaps this would be the outcomes..."*

Seven months into the merger, with both former vice-chancellors operating from one campus, uncertainty existed due to limited direction in which the merger was moving. One former vice-chancellor responded with, *"we still try to get our direction...but I think... according to me, we are moving a little slow... I would like us to increase the speed a little bit, so that in about five years, we see major change"*. It was also highlighted that the direction was not clearly defined. The following remark reflects this: *"It looks like there is this undefined, undisclosed kind of direction that we all have, but we didn't come together to share it."*

Peers

It was stated that when liaison with colleagues and peers on the campuses took place, clear reference was made to the fact that *"much tension was experienced"* and *"we had to accept this merger"*. Although the negativity and experience from

colleagues could be regarded as an internal force, *"some sort of willingness that we will make this thing work was also visible"*.

It was indicated that much pre-suppositions, fear and uncertainty existed amongst staff members, also that uncertainty is something that is difficult to cope with. It was clearly expressed that people would rather accept something they do not like than to continue operating in uncertainty by wondering about the eventual outcome. One respondent was clear that strategically the uncertainty associated with the merger had to be gotten rid of. This is why a clear decision was made that the merger was to be engaged in, and by indicating how it was to be done, a fair degree of certainty about the future was ensured amongst staff members.

When referring to peers, one respondent remarked that *"we are totally different, and I think ... that this is where I observe this guarded feeling"* and *"well, because of the differences in institutional cultures, our values were also different."*

The issue of whether the two former universities would be regarded as equal partners in the merger clearly surfaced. Reference was made to the so-called "Potchification" of the Mafikeng campus. It was emphasised that due to the so-called "big campus in Potchefstroom", the reference to 'Potchification'¹⁵ would possibly never be removed as it was stated, *"the Vaal Triangle and Mafikeng campuses will not really surpass the Potchefstroom campus...there were just too much history and resources ploughed into the Potchefstroom campus."*

It was mentioned by one respondent that legitimate fears existed that some people on the other campus were working very hard, while the contrary was also true, namely that there were people doing nothing, and that those doing nothing were afraid of the fact that they had to stop doing nothing.

The one respondent emphasised that it was not possible to tell staff on the campus that everything will fall into place without any assurance of when this would happen. Realism had to be embraced whilst fighting took place to two sides, *"I had to tell my*

¹⁵ Mafikeng staff started to use the word "Potchification" implying that all initiatives on the Mafikeng campus was agenda driven to ensure compliance with that on the Potchefstroom campus.

own people let's do this, and those who were negative I had to influence to become positive. And then there were those who were just too naïve who had to be told to be more realistic. At the same time I had to tell the merging partner, 'You are not realistic...' This really was a multifaceted thing..."

Getting peers to move in the same direction was highlighted by the following: *"Being in the leadership and... after convincing myself about the positive side of it, I had to come up with a strategy of showing people the positive side of it so that we all move towards the same direction, even if we don't get 100% to do that, but at least then the majority would support it..."*

It was mentioned that a psychological distance existed between the two partners who were engaged in the merger. Conceptual differences relating to the merger created some distance between those who had to collaborate. It was stated: *"Psychologically it's still there...you know, you listen to people as they speak... you ask yourself, these people are in the same area, and there's still this distance between them..."*. It was indicated that time was needed to clarify misconceptions when the two sides met.

Students and alumni

During the merger process various meetings were held with former students of one campus. It became clear that the majority of them were unsure of what this merger would bring about for their alma mater. This was regarded a never ending process of also talking to alumni...Reference was made to about 25 discussion forums with alumni over the entire country. From the fears and uncertainties identified during these discussions, some answers were also being derived at.

One respondent mentioned students by referring to producing a *"new kind of student. Although the campuses can be apart from each other, they are going to have certain characteristics that they share...and will represent this university properly, also with loyalty"*.

Strategy

Strategically it was important to take the correct decisions by looking at the big picture, identifying the strategic beacons, isolating them and working on them. In this way, certainty was established about the approach towards the merger. This was summarised by the remark: *"I think this worked...by isolating the critical strategic issues and by planning how it could be implemented"*

Many strategic alternatives were considered before entering into the merger. One response indicated that a model of collaboration between the two universities was first thought of as an option, but as they went along and started to ensure one vision for the merger, this idea started to fade, but not without difficulty, because *"everybody did not agree"*. The behaviour of those who had to make the decisions was difficult to predict because *"behaviour is driven by conviction."* It was also emphasised that when the merger was accepted as a *"fait accompli"*, and that it had to be accepted, a *"behavioural change and determined willingness to make this work was observable...initially everybody did not agree but as we progressed the differences became less..."*

The strategic direction of the merger was described as positive although the movement was *"a little slow... I want to see it finished before I start to lose interest, or I lose momentum, if something drags and drags and drags, I lose interest and look at other things. So, while I am still excited, I would like us to increase the speed a little bit."* One respondent mentioned that the direction in which the merger was heading *"was based on unity, diversity, equity and effectivity"¹⁶...possibly the best outcome for both parties."*

Culture

Reference was made to work ethics, institutional culture, campus culture and racial culture respectively. One response was, *"well, because of the differences, in*

¹⁶ Assumed by researcher that the respondent meant effectiveness

institutional cultures, our values were also different... but I was cautious not to be offensive."

One respondent clearly indicated that the merger started to look more attractive when both parties accepted that campuses will be allowed to create their own campus cultures. It was furthermore expressed that government would possibly not be satisfied with this decision but it was something that both negotiating parties agreed on...*"This was uniquely South-African, unity in diversity dynamics"*. Although each campus had its own culture everybody would feel welcome within any campus culture.

Resources

Both respondents wondered about the extent of the resources government was prepared to put into the merging universities. The cost associated with the merger was highlighted with the following remark: *"The merge is very expensive. I don't know when we are going to reap the benefit or the fruit economically but politically it had to happen"*. Furthermore, the lack of *"breathing space"* was mentioned and a comparison was made with industry organisations which merge, where they know exactly which issues are to be focussed on. In this instance the thought was expressed that *"we did not clearly know what to do, we just had to go back, deal with these things and make the merger succeed...this was not conducive, it was very, very strenuous."*

The physical distance between the campuses was mentioned and the cost-effectiveness and the burden it placed on human resource capacity were questioned as follows: *"...really the distance is dangerous. We drive up and down...during nights... the distance is too far. We spend a lot of time driving, this while we could be doing something [else]. We drive long distances to come for an hour meeting... you know, having driven five hours... just to have a meeting for one hour... it's not economical if we talk of time"*.

DISCUSSION

After interviewing the two respondents, various issues that affect the merger were identified. On the basis of these experiences, it seems fair to state that merging two such diverse higher education institutions in the South African context does not come easy. Whether the politicians realise this or even care about the people who are at the coal face of making a merger succeed needs to be determined. The possibility may exist that various higher education institutions involved in mergers feel as if they find themselves in a "*cul de sac*", not knowing whether they are on the correct track.

Could government as the initiator of and force behind the mergers in pursuit of the transformation agenda and all the jargon associated with it not have identified some contributing factors, excluding the financing of their own agenda? By possibly ignoring the identification of aggravating or assisting factors, the restrictive factors became dominant and overwhelming in an environment where success is of the utmost importance.

A variety of forces, at least conceptually and psychologically, were generated and therefore exist in, behind or during the merging of higher education institutions. Since it was found that the two former vice-chancellors who were involved in the merger identified, and were possibly influenced by, these forces, they and the dimensions associated with them should be taken into consideration when the future of the merged institution is predicted. Both respondents expressed some emotional (affective) reactions; they also expressed their understanding (cognitive) of certain scenarios and it could also be derived from their responses how they act (behaviour) and intend to act in the circumstances. A thematic grouping of forces, the possible actions of the forces and how they impact psychologically on human nature are graphically illustrated in Figure 2.

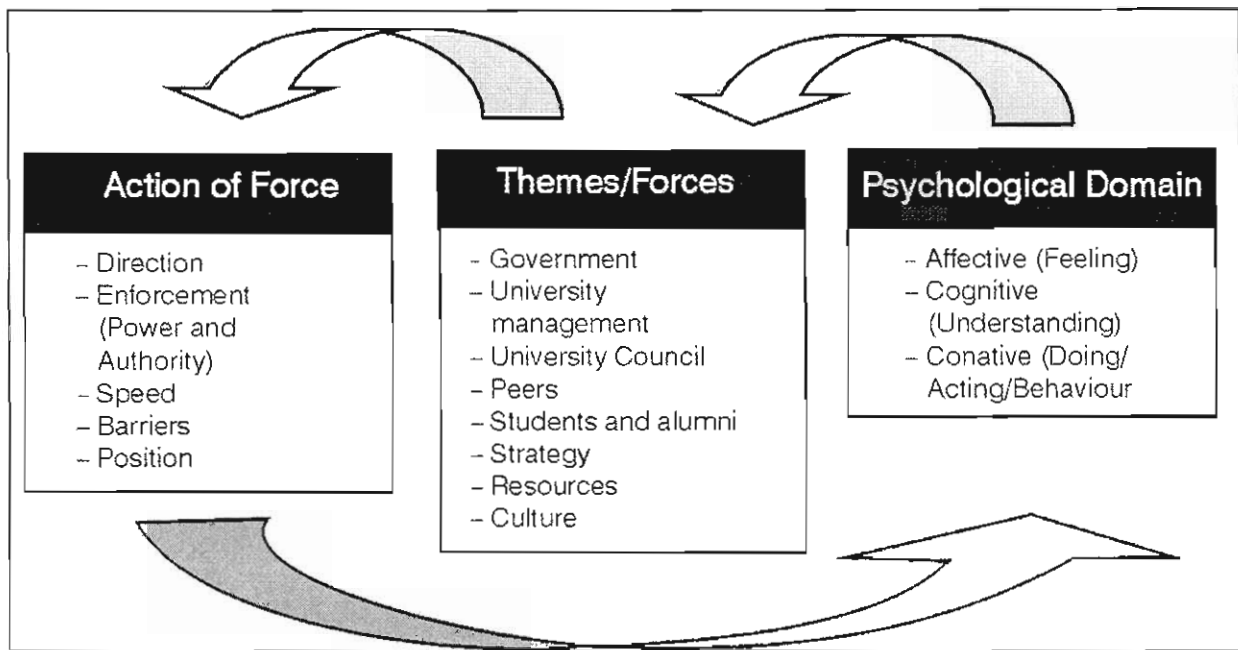


Figure 2. Thematic grouping¹⁷ of forces, their actions and psychological effects

Figure 2 provides a description of some contemporary forces identified thematically within the context of this merger. The interrelatedness, and hence interdependence, of forces remains to be determined.

The act of the government, as co-custodian of governance in higher education, of enforcing the merger in a non-collaborative, non-consultative and autocratic way was disruptive. This was not only done by determining the game, the game plan and the rules for both sides involved but was also done without any clear educational motive for the merger (the forced game). This tactical move by government could be the one that is referred to by Jansen (2002, p. 2) as "the forces governing mergers, and the effects that flow from them, as institution blind". Jansen's reference to "the forces governing mergers" is interesting in the sense that nobody else ever referred to forces involved in the merging of higher education institutions. He furthermore states clearly that due to a lack of research it is evident that insufficient attention has been paid to the process and effects of institutional combination when very diverse

¹⁷ Thematically grouped based on the qualitative analysis of responses.

institutions were merged into the same social context. Merger environments could be regarded as ticking time bombs if not governed and managed sufficiently.

It is evident from the findings that government was regarded as an irresistible force having the necessary juridical base to enforce transformation and development with political correctness and precision. The role that governments worldwide play in the formulation of legislation and hence the structuring of universities cannot be ignored. Higher education in general cannot escape major and sometimes difficult change, and governments are determined to lead those changes, rather than be driven by them (Giannakou, 2006). The role of government in higher education has been well researched and included themes on government's getting even "closer" to higher education (Court, 2004) and trying to create greater access for students whilst assuring that they are trained for the world of work (Coaldrake, 2000; Maloney, 2006; Rammel, 2005).

Whether this applies to the South African situation still needs to be determined. The intention, however, was expressed by government's vision in 1997 of a transformed, democratic, non-racial and non-sexist system of higher education that will promote equity of access and fair chances of success to all who are seeking to realise their potential through higher education, while eradicating all forms of unfair discrimination and advancing redress for past inequalities; that will meet, through well-planned and co-ordinated teaching, learning and research programmes, national development needs, including the highly-skilled employment needs presented by a growing economy operating in a global environment; that will support a democratic ethos and a culture of human rights by educational programmes and practices conducive to critical discourse and creative thinking, cultural tolerance, and a common commitment to a humane, non-racist and non-sexist social order; that will contribute to the advancement of all forms of knowledge and scholarship, and in particular address the diverse problems and demands of the local, national, southern African and African contexts; and that will uphold rigorous standards of academic quality (DoE, 1997).

Respondents were disoriented, angry, and frustrated and could do nothing to overturn government's decision; they simply had to manage it, owing to an

inadequate political power base to avoid the merger, as other institutions did¹⁸. The minister of education clearly had little empathy with the position of the respondents' respective constituencies. This scenario becomes evident from the following statement: "... the Ministry will not hesitate in certain limited circumstances to intervene directly in the higher education system in order to ensure stability and sustainability..." (RSA, 2001, section 1.5). Jansen (2002, p. 1) highlights the profoundly positive ambitions of the national Plan for Higher Education by quoting the Ministry of Education: "The National Plan indicates the strategies and *levers* through which the framework and system-wide targets and goals...*will be achieved*. The planning process in conjunction with funding and an appropriate regulatory framework will be the main *levers* through which the Ministry *will* ensure that targets and goals of this national Plan are realised". Referring to *lever* possibly implies some kind of force. The control over funding as part of the government equation strengthens its power as a force with the necessary leverage to be obliged with. The well known words of George Orwell (1946) "Power tends to corrupt; absolute power corrupts absolutely" could possibly (also) be brought into the equation.

However, although the merger was enforced by government, both respondents visualised the possibility of an improved university management. The role of university management is supported in literature when Moja and Hayward (2000) refer to The National Commission on Higher Education's (NCHE) intentions to move forward rapidly in transforming institutions, and in instilling improved management practices without violating academic principles. It can be deduced that university management and those responsible for governance (government and university councils) all play a cardinal role in leading and directing (changing) the university in a desired direction, which can also be referred to as a vision. Vision in turn requires leadership.

Curri (2002) established an inferred relationship between leadership, restructuring, managing staff relations, organisational development, external pressure for change and organisational change. Curri (2002, p. 133) developed the "primary triad model", suggesting a holistic approach to achieving desired *change* outcomes, failing which

¹⁸ Institutions that had political influence to avoid a merger were known to one respondent. This was verified by the researcher during an informal discussion at a conference with senior staff members of such institutions.

change may be a perception rather than a reality. Whether the anticipated change took effect to some extent needs to be determined by the way in which it was managed. Kavanagh (2000) is of the opinion that corporate-style management has eroded academic freedom and tenure¹⁹. He furthermore mentions that the restructuring of higher education to increase performance is but one element of corporate ideology that undermines a university's mission of knowledge production and dissemination.

In Australian higher education a clear distinction is also made between management and governance (Knight, 2002). Governance of the institution is the direct function of the University Council. The (political) role of the Department of Education and hence the minister of education can also not be neglected, especially with regard to the appointment of "government-friendly" council members.

The defining trend in governance has been a systematic increase in direct state control over higher education in South Africa. 'Conditional autonomy', in contrast, allows both for the procedural role of the state in ensuring the effective use of public money and the substantive rights of higher education institutions to academic freedom in teaching and research (Hall & Symes, 2005, p. 200). State steering of governance in higher education was established as a form of state supervision that relies on a political mode of coordination based on the participation of diverse stakeholders within a hierarchical system of authority, and with formal constraints on the exercise of power (Cloete, 2002).

Hall and Symes (2005, p. 207) postulate that the following question remains: How can institutional autonomy and the facilitative and directive role of the state be conceptualised for the purposes of practical, day-to-day policies? According to Hall and Symes (2005) a possible answer lies in a more nuanced conceptualisation of the complex notion of autonomy, which in turn guides appropriate assignment of roles to state and institutions in system-level governance. Berdahl (1990, p. 171) suggests

¹⁹ The reported university has a unique management structure as set out in its statute as approved by the minister of education. The positions of vice-chancellor and rector have been separated, resulting in it having a vice-chancellor, one vice-principal and three campus rectors. The vice-chancellor and vice-principal are situated in an institutional office, while the three campus rectors are situated on the respective campuses. The three campuses have equal status and are thus equal partners; there is no main campus. A clear distinction is also drawn between management and governance.

that: taken most simply, autonomy in its complete sense means the power to govern without outside controls, and accountability means the requirement to demonstrate responsible actions to some external constituency(ies). In theory, the argument has been advanced that there is not necessarily an incompatibility between being both highly autonomous and rigorously accountable; in practice, one senses that usually where more accountability is required, less autonomy remains (also see Boesak, 2007, p. 4). The ideal to be sought seems clearly to be a balance of both conditions. Indeed, these are difficult circumstances where strong management and leadership are needed to guide a university through the many challenges facing the higher education sector (Kgosana, 2006a, p. 2).

The indication by respondents that peers on campuses had their reservations, causing a psychological distance due to differences associated with institutional culture and values, is reported in literature as a tendency. Baron (1983) reports that employees working in an organisation quickly tend to develop attitudes towards their work environment, but also towards their peers. In this instance, possibly even more so because strangers now have to work together. The extent to which employees on the different campuses are able to work together, especially in view of academic programme alignment and reconfiguration, will definitely influence the merged institution's overall performance. The pro-active engagement by leadership in limiting any contra-productive perception is possibly the key to limit constraining factors when the merger is fully implemented at the core level of academic process and procedure.

Government clearly had a(nother) plan with students, therefore in the National Plan on Higher Education (NPHE, 2001) the South African government has highlighted the following imperatives: Producing the graduates needed for social and economic development by means of an increased participation rate, increased graduate outputs, a broadened social base of students, increased recruitment of students from SADC countries, changed enrolments by fields of study and enhanced cognitive skills of graduates, hence producing the graduates that are needed for social and economic development. This plan is to be ensured by restructuring the higher education landscape, by achieving equity and diversity and by sustaining and promoting research.

The role played by students and alumni in influencing the future of an academic institution should certainly not be underestimated. Students want assurance that they will be employable once they have graduated. Whether they are always correctly trained for the world of work is questioned by several stakeholders, including government (Maloney, 2006). Student and alumni associations are institutions that are used to create, maintain or modify relations between educational organisations and their publics.

One respondent indicated that several discussions had been held with alumni groups all over the country, explaining the merger process in which their alma mater was involved.

This seems also to have happened where student and alumni associations were a fundamental part of the workings of the education and employment engine in Spain during a political transition they had undergone. Public relations managers of higher education institutions could gain information from alumni associations, professional associations, student associations, government, and the public in general, and could therefore achieve their goals with greater ease (Arceo, 2003). Furthermore, alumni associations could serve as bridges between the educational sphere and the job market (Arceo, 2003). This is supported by Mashalaba (2006), who argues that the gap between higher education and the labour market needs to be breached. Arceo (2003) furthermore argues that student and alumni associations could serve as an indicator of youth unemployment and with their independent roles, have been and are an essential element for the undertaking of public relations.

By working with alumni associations, higher education institutions are achieving their goals and objectives with increased ease, and the perspective of the job market is being made clearer. Alumni associations become institutions worth considering in the evolving relationships between organisations (public, private, political and others) and their publics. Sufficient engagement with former students during a transformation phase could be a contributing factor in ensuring success.

It was indicated by the respondents that much difficulty was experienced in deciding on a merger strategy, possibly because it was something they were forced to engage

with. This at least was the scenario before the merger, and even still so six months into the merger. Clear reference was made to the fact that staff had to support the strategy but that their behaviour was driven by conviction [that the merger would be a success].

The processes associated with the strategic direction of an institution generally refer to three stages, namely strategy formulation, implementation and evaluation. The formulation includes developing a mission and a vision, identifying business opportunities, deciding how to allocate resources, whether to expand or diversify operations or whether to merge or form new ventures. Implementing strategy not only requires the formulation of annual objectives, devising policies, motivating employees and allocating resources to ensure that the formulated strategies are executed, but also the development of a strategy-supportive culture. Evaluation of strategy ensures that managers know what is working and what not (also see David, 1997, p. 5).

Whether sufficient processes in support of a clear strategic direction were implemented to ensure committed and willing staff members could be quantitatively determined but is dependent on the time when it is done. In today's market, higher education leaders find themselves considering issues of quality assurance, increased participation, the potential of new technologies and improving standards of teaching, learning, research and community engagement, and hence also of leadership. Strategically universities need to decide on issues related to political and economic climate indicators; national and institutional internal policies and procedures, and their implementation and implications; development of academic programmes that are able to enhance student achievement yet still delivering in terms of national priorities; ensuring institutional effectiveness; strategic planning and the linking of planning, quality improvement, resource allocation and institutional research; applying institutional research findings to strategic planning; and utilising the HEQC programme accreditation, national review and institutional quality audit system as a catalyst for institutional planning.

In addition to the strategic direction Wolpe (1995) postulates that the central developmental task facing the country is dependant upon the strategies to be

followed in order to change institutional and social structural conditions so as to bring about a democratic social order in which race and gender inequalities are radically reduced and the economy expanded to satisfy the basic needs of the people and of the country as a whole. Aiming in a specific strategic direction could possibly influence the "cultural future" of the institution.

Many differences were highlighted by the respondents in terms of campus cultures. During the stormy negotiations a consensus decision brought along acceptance and calmness that unique campus cultures were to be assured. However, it was done with the reservation that government (as a force) would not be satisfied.

Culture has been defined by Hofstede (1991, p. 19) as "the collective programming of the mind which distinguishes the members of one group or category of people from another". Consequently, "organisational culture"²⁰ is holistic, historically determined, related to things like rituals and symbols, socially structured, created and preserved by the group of people who together form the organisation, soft and difficult to change".

Defining culture in a university environment to some extent can be regarded as complex and possibly also controversial. The relationship between the existing national education culture, as predominantly dictated by the governing ANC, compared to the cultures of the former autonomous universities, could not be left out of scope by asking whether it is possible to modify campus cultural patterns as manifested in an ANC government-dictated environment through managerial interventions. The requirement of culture change seems to be very difficult to achieve since culture itself is highly complex (Herguner & Reeves, 2000).

As the trend to mass higher education has continued the culture of academic organisations has been viewed as much more complex than that of other organisations, though the area of organisational culture has been neglected in discussions of academic management. Systems of belief, or ideologies, have an influence on academic institutions at three different levels, namely the culture of the

²⁰ For the purpose of this research an in-depth analysis of the meaning of "organisational culture" is regarded unnecessary.

academic enterprise, the culture of the academic profession at large and the culture or distinctive ideologies of the academic disciplines (Dill, 1992).

Wilson (1999, p. 15), an American researcher, reports that on nearly every campus, a bureaucracy of residence-life advisers, multicultural affairs offices, women's centres (for feminists only), ethnic dormitories and social centres, and special services for gay, lesbian and trans-gender students now exists. He furthermore elucidates that the categories of culture that are recognised by the orthodox academic notion of diversity and multiculturalism are astonishingly limited – race and ethnicity, (but only race and ethnicity that have experienced oppression), gender (but only as defined by academic feminism) and sexual orientation (with only gay, lesbian and trans-gender identities being worthy of celebration and sympathetic study; heterosexuality is the mark of the oppressor) (Wilson, 1999, p. 17). Could these phenomena be regarded as culturally related, could be asked?

Cultural diversity is possibly the one phenomenon that merged higher education institutions would prefer to celebrate by referring to it as a strength due to the merger. But, where diversity is celebrated [possibly as is in the case of a merged university], Wilson (1999, p. 19) postulates (albeit from an American perspective) that what is excluded from the celebration is the study and deeper understanding of "evangelical, fundamentalist, protestant culture", "traditionalist catholic culture", "gender roles of orthodox Jewish or Shiite Islamic culture", "black American Pentecostal culture" or of assimilation of the "white rural south" and "cultures that require mastery of non-English languages for genuine understanding".

The possibility exists that academics (and students) may have a variety of views and interpretations of what should and what should not be embedded in a university's culture. One clear reference to culture in a higher education context was made by Mandla Seopela, SASCO president (as quoted by Kgosana, 2006b, p. 12), when he said that before poor performance [of students] can be taken into consideration, other factors such as institutional cultures and the attitudes of academics need to be taken into account. At historically white universities, he added, black students continue to fail at a higher rate because of the culture of those institutions and the racist attitudes of certain white academics. At historically black universities, students

have to learn in overcrowded lecture halls and are forced to live in residences that are not suitable for human habitation. In conclusion he asked: "How many black students drop out of universities because of socio-economic conditions and racism of academics in white institutions"?

Managing the cultural dimension of mergers is a very important element in helping to ensure integration, in creating a sense of loyalty to the new institution and in addressing possible high levels of conflict and stress. This dimension has been vastly understated or ignored because of the elusive and hard-to-pin-down nature of institutional culture and because of the time needed for culture building and consolidation to occur in newly created institutions. Such a process involves important elements, which include managing the diverse academic orientations, values and attitudes of staff, integrating different student cultures, creating a strong research culture, and building morale and a sense of community that helps develop loyalty to the newly created institution (Kay 2002)

From the limited research available that relates to post-apartheid university culture in South Africa it could be deduced that cultural issues, besides several other issues, also relate to social clusters or groupings of people, student life, race, gender, religious and language issues. The findings of this research could possibly be indicative of the pressures imposed on change by "national cultural patterns".

The reference made to the resource implications that the merger was experienced as strenuous and hence a restrictive factor. The Council on Higher Education advised that the restructuring of the higher education system to ensure its sustainability, including in particular, the efficient and effective use of resources, required a reduction in the "number of institutions through combining institutions" (CHE, 2001, p. 56-57).

The assuring of control over resources as part of the national agenda obviously became a force to be reckoned with. Financing of higher education institutions is regarded as one of the most powerful steering mechanisms to enforce government policies (Smit, 2005). The reference to resources was included because of the argument occurring in a Council on Higher Education (CHE) document that the

"current landscape and institutional configuration of higher education has had its roots in an apartheid past; is inadequate to meet socio-economic needs and was no longer sustainable; a lack of human and financial resources to maintain the present institutional configuration; senior and middle-level leadership, management and administrative capacities are absent or lacking in parts of the system; patterns in student enrolments also indicated that a number of institutions were at risk and that some institutions did not satisfy the specification to continue as independent institutions" (CHE, 2001, p. 51). It might be asked whether these were the only reasons.

In support of the CHE document, Hay and Fourie (2002) identified, amongst others, various financial factors that necessitated the merging of higher education institutions. Quite a number of problems were experienced in the higher education sector. Some of the most important factors that contributed to the problems in higher education according to Hay and Fourie (2002, p. 115) included above all the inequities and distortions of the system; incoherent and poor articulation between various types of higher education institutions; under-prepared students from poorly resourced socio-economic and academic contexts; unequal distribution of resources and subsidy amongst higher education institutions; declining state subsidy, mainly as a result of poor economic growth; increased competition in the system from particularly international and private higher education institutions, and a decline in student enrolments. Also in support of the CHE's resource notion, Motala et al. (2003) note that reviewing higher education could be a step towards positively promoting the regional sharing of resources, including academic staff and libraries, eliminating wasteful duplication, and encouraging synergies between disciplines, universities and communities.

When reforms in higher education are on the agenda, they should specifically be focused on funding, what students learn, responsiveness and diversity, research and innovation, and, finally, migration and internationalisation (Giannakou, 2006). This has a definite influence on planning for the allocation of resources in the higher education context, at least in the case of South African higher education.

In the past few years virtually every state-funded higher education institution has engaged in an attempt to reposition itself in relation to the emerging policies of the new South Africa. Furthermore, many higher education institutions are struggling to survive in a context of financial stringency, declining student enrolments and increasing competition. Amalgamation or merging with other institutions seemed to be the obvious solution (Jacobsz, 2004). After 1994, the legitimacy of government policies has been founded in a discourse that stresses the interests of all South Africans. Shifts in governance arrangements, which in turn frame policies for increasing equitable participation in higher education and for achieving outputs considered appropriate for a developing economy, reflect an interpretation of the appropriate relationship between the state and individual institutions (Hall & Symes, 2005).

Despite the contextual variables, as highlighted by Jansen, (2002) which influence the higher education sector the former minister of education, Kader Asmal, progressed with government's transformation agenda to merge certain higher education institutions into a so-called Asmal-etic²¹ "rational, seamless higher education system that grasps the intellectual and professional challenges facing South Africa in the 21st century" (see Motala et al., 2003). To drive the endeavour towards a seamless system and in support of the political agenda, the so-called "Asmal-isation"²² of higher education institutions were accepted as a *fait accompli*.

It is a familiar fact that the traditional main source of funding,²³ namely subsidy awarded by the Department of Education, has become tighter from year to year. This is particularly true in the wider context of social demands for improved health and primary education. The percentage of the government budget to higher education is under pressure in the context of other equally important national needs. Furthermore, public higher education institutions are facing mounting enrolment pressures in the context of state appropriations. Public higher education institutions are all looking to the same [re]sources for new support: fundraising, educational ventures, internal cost savings and efficiencies, entrepreneurial activity involving

²¹ Refers to a former minister of education, Kader Asmal.

²² Refers to a former minister of education, Kader Asmal.

²³ Financing influences all resource allocation, e.g. human, and physical infrastructure.

intellectual property, innovation and industry-university collaboration. The question should then possibly be asked whether higher education does not risk losing sight of the essential functions of higher education. Universities are called upon by many constituencies to act more businesslike and to pursue goals that are more measurable, at least in the context of profit and loss.

RECOMMENDATIONS

Given the results of this study, it is recommended that the institution take care in assuring that other managerial levels involved in this institution do not experience difficulty with the same types of forces, as such forces could place extra demands on individuals, especially academics. Academic management's feelings regarding and understanding of forces could possibly jeopardise their performance and even work wellness.

Two suggestions for further research stem from the present findings. Although this study has identified the experiences of two former vice-chancellors indicating some forces associated with the merger, additional research is needed to further determine the cognitive, affective and conative orientation of vice-rectors, academic school directors and deans. Various analyses can be made on the basis of this feedback and an indicative set of results is quite possible.

This paper has highlighted some thematically grouped forces as experienced by two vice-chancellors of former universities who had to merge.

In summary the results of this study show a vast amount of forces, at least psychologically speaking, that have been established either intentionally or unintentionally.

AUTHOR'S NOTE

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CHAPTER 3

ARTICLE 2

A THEMATIC ANALYSIS OF COGNITIVE, AFFECTIVE AND CONATIVE EXPRESSIONS OF SENIOR ACADEMICS IN THE MERGING OF TWO UNIVERSITIES

ABSTRACT

The objectives of this study were to determine the cognitive, affective and conative expressions of senior academic managers in the merging of two universities. Questions based on thematically grouped forces associated with the merger environment were used in the survey to determine the respondents' cognitive, affective and conative responses. The whole population of vice-rectors, school directors and deans was requested to participate in the research. Questions or items were linked to the aforementioned three psychological domains and then grouped as constructs. The Cronbach alpha reliability coefficient on all constructs, except one, measured higher than 0.75. It may therefore be deduced that all the constructs were reliable in the context where they were used. Evidence was found to support the statement that the university council at the time of the study was a restraining factor and hence a negative force in the merger.

OPSOMMING

Die doelstellings van hierdie studie was om die kognitiewe, affektiewe en konatiewe uitdrukkinggewing van senior akademiese bestuurders in die samesmelting van twee universiteite te bepaal. Vrae gebaseer op temasies gegroepeerde kragte wat met die samesmeltingsomgewing verband hou, is in die opname gebruik om die respondente se kognitiewe, affektiewe en konatiewe response te bepaal. Die hele populasie van viserektore, skooldirekteure en dekanes is versoek om aan die studie deel te neem. Vrae of items is aan die voorgenoemde drie psigologiese domeine geskakel en daarna as konstruksies gegroepeer. Die Cronbach-alfa-betroubaarheidskoëffisiënt op alle konstruksies, behalwe een, het hoër as 0.75 gemeet. Daar kan dus afgelei word dat al die konstruksies betroubaar was in die konteks waarin dit gebruik is. Bewyse is gevind om die stelling te ondersteun dat die universiteitsraad op die tydstip van die studie 'n beperkende faktor en dus 'n negatiewe krag in die samesmelting was.

The change in the South African government in 1994 led to a fast-tracked transformation agenda. This agenda also included higher education. Transformation of higher education is directly linked to a political agenda (Phoenix, 2003) (also see Rademeyer, 2007, p. 6). The higher education sector in South Africa is being urged (or forced) to transform, with specific reference to social transformation, widening of access and improving efficiency (Cele & Menon, 2006). However, there is evidence of mistrust in this transformation agenda. According to Gerber, as quoted by Du Plessis and Azzakani (2006), healthy educational principles have since 1994 been replaced by an obsessive political ideology. Reference to the governments' political ideology is also made with regard to the commemoration of history (Greyling, 2006, p. 10).

According to Hall and Symes (2005), it could be argued that any state control in governance of universities is contrary to the principles of academic freedom and counter to the conditions necessary for higher education to prosper. However, Hall and Symes (2005) state that this argument fails to accommodate the requirement that government is accountable to the electorate for the appropriate and effective use of public funds. This could only partially be supported within a context where government is contributing only 40–50% of a university's income, yet it could be experienced as if government, with this [minority] contribution, acts as if it has a 100% stake, and therefore acts as if universities are [just] state departments (Smit, 2005, p. 13). To name but one example of government's involvement, Jansen²⁴ (as quoted by Kgosana, 2006a, p. 9) says that forcing²⁵ universities to cap their tuition fees could threaten the existence of several institutions and that the minister²⁶ was using extremist examples to make policy. In conclusion Jansen (as quoted by Kgosana, 2006b, p. 9) asked whether there is enough money to enable universities to operate in a responsible fashion (also compare Mkhabela, 2006, p. 5). The use [or misuse] of funding was also raised by Modiba²⁷ (as quoted by Kgosana, 2005, p. 21) when he said that the major problem facing higher education is that government is expected to carry this burden on its own. "We want the corporate sector to play a bigger role in assisting government to fund higher education. The funding of higher

²⁴ Jonathan Jansen of the University of Pretoria (at the time of the study)

²⁵ Force (see discussion of term below) exercised by Government during DoE budget vote in parliament

²⁶ Government

²⁷ Mothupi Modiba was Sasco National Chairperson at the time - 2005

education has drastically and steadily decreased by comparison with the days of the apartheid regime"

Greyling (2006) states that the government is unable to manage mainly due to the establishment of an administrative system that cannot be trusted. The continuous black economic empowerment agenda is also questioned in the reference to the phenomenon that if the past is constantly raked up, the effect will be that a new generation of whites, coloured and Indians will be punished for the past because they are simply not black enough (Bekker as quoted by Ueckermann, 2006). The replacement of white vice-chancellors at former white tertiary institutions with black people is sometimes supported by staff and students. A quote from one of the union spokespersons at one institution reflects this: "Blacks are the majority in this institution [now] and hence there is a need for a black academic with impeccable academic credentials to lead the university as it transforms." (Pearce, 2005, p. 9). By merging higher education institutions the government has created an equity gap, reducing the number of women vice-chancellors from four to one (Kgosana, 2005, p. 6). The implication is that some remaining white chancellors may also be replaced.

By merging some²⁸ higher education institutions the government undeniably wanted to leverage the political transformation agenda. In March 2001 the Minister of Education appointed a national working group consisting of 11 persons from business, labour, higher education and government which released a report in December 2001 and recommended the reduction of higher education institutions from 36 to 21 through the mechanism of mergers, listing the specific institutions in various provinces to be targeted for merging (DoE, 2001, p. 4). On 1 January 2004 the University of North West²⁹ was merged with the Potchefstroom University for Christian Higher Education to become the North-West University. The Vista University's Sebokeng campus was incorporated into the Vaal Triangle Campus of the North-West University (Van der Walt, 2006).

²⁸ Various underperforming higher education institutions escaped the merger agenda due to the influence of politicians who had previously studied there (Smit, 2005, p. 13).

²⁹ A so-called "Historically Disadvantaged Institution" (HDI)

In order to maintain good practice in this merged higher education institution and to protect all stakeholders it is vital to determine how a selection of academic managers have experienced the merger of the two higher education institutions to date.

The researcher's interest in this subject stems from experience as a lecturer in higher education over the past 16 years³⁰. During this time, a vast amount of change took place in both the country in general and in higher education specifically. Although a wealth of research exists regarding the concept of mergers, the area of mergers for higher education institutions and the accompanying experiences of academics has received virtually no or very little attention. It represents an area that could make a highly useful contribution to a range of issues, such as the development of future strategies for the institution's managerial and governance³¹ teams.

According to Gruneberg (1979), an investigation into the levels of job satisfaction is of the utmost importance due to the fact that employees spend most of their working lives at work. Due to the changes in higher education and the forces enacted upon higher education institutions, it needs to be determined how they are being experienced by the employees concerned. The future success of any merged higher education institution is also likely to be determined by the level of willingness on the part of managers to formulate their perceptions of and attitudes towards the alignment of the institution's core business processes and procedures and to plan appropriate management interventions based on this information. It may be true that without aligning the core business processes and procedures that the government's agenda of improving efficiency will not be realised in good time.

The way in which different clusters of employees, e.g. academics, support staff, management and governance teams, have experienced the merger could possibly differ. How the move³² towards the merger was conceptualised and experienced by all staff involved remains unresearched. It is assumed that some sort of force(s) was(were) experienced by the different clusters. This in turn could possibly be

³⁰ At Technikon Northern Gauteng (Soshanguve Campus of Tshwane University of Technology): PU for CHE and presently North West University.

³¹ I.e. Council.

³² Description of a force (see discussion of term below).

directly related to their respective affective (emotional), cognitive (understanding) and hence conative (acting, behavioural) disposition. Consequently reference could be made to what is known as the conceptualisation of psychological forces.

The meaning of "force" in the human and social sciences is diffuse and controversial. It has a broad range of meanings, and can include positive or negative experiences related to the type of force experienced or observed. The context in which a force is experienced or observed could possibly also influence the psychological conceptualisation of the force concerned. Lewin (1938) first formulated the conceptual properties of the construct of force as well as a definition co-ordinating it with observable processes. The conceptual and dynamic relation between psychological forces, valences and tensions is eminent. Lewin (1938) indicates that one outstanding property of a force is its directedness. However, he states that direction in the psychological context cannot be defined as physical direction and cannot be determined by Euclidean geometry.

The future success of a merged university is also likely to be determined by the level of willingness on the part of members of management to formulate their perceptions of and attitudes towards the psychological forces embedded in the processes of merging the different institutions and to plan appropriate management interventions based on this information. The perceptions are formed by means of inner dialogue, organisational climate and organisational culture, as graphically illustrated by Gallway (2001) (see Figure 1).

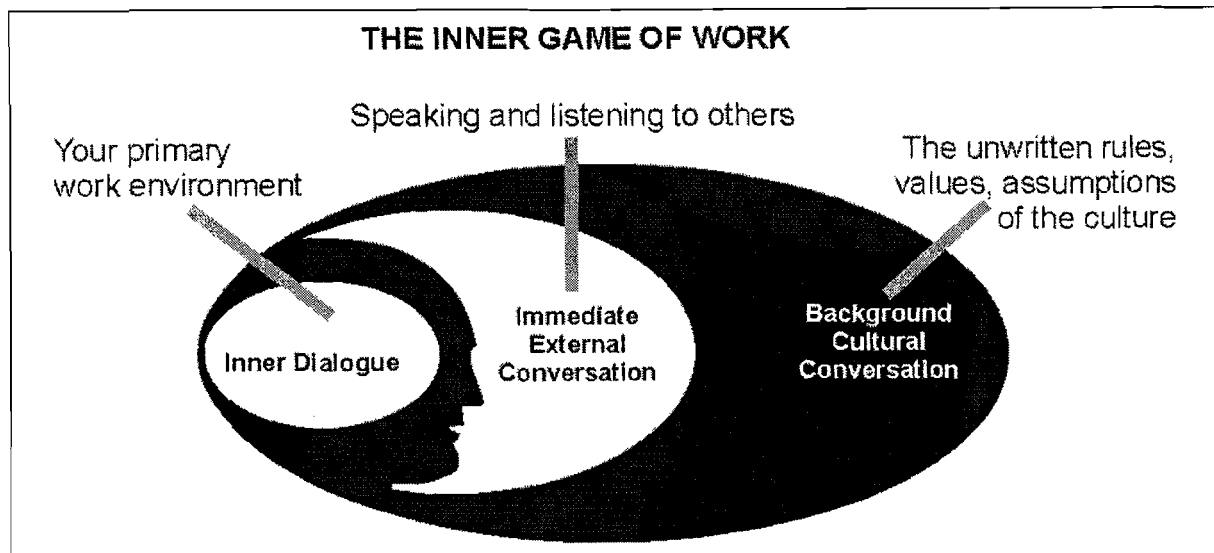


Figure 1. The inner game of work (Gallway, 2001)

Firstly, no research could be found that relates to psychological forces that exist during the merging of universities, nor were any published surveys on similar research available. Secondly, no attention has been paid in academic literature to the issue of psychological forces in the merging of universities. Various researchers have published on issues in the merging of higher education institutions that relate to culture, finances and politics, as referred to in a previous article by the author (also see Wilson; 1999, p. 19).

Information about the perceptions of and attitudes towards the psychological forces will enable management teams at all campuses of the merged university to implement plans aimed at ensuring that the merger has the envisioned impact and change.

Curri (2002) says that to achieve change in a higher education environment more than one factor must be present. Changes in the work environment, in this case higher education, could influence job satisfaction. Coetzee (1998) postulates that job satisfaction could be linked to behaviour that serves as an indicator of positive organisational behaviour. However, controversy exists regarding the relation between job satisfaction and general life satisfaction (Kontrak, Futrell, & Sager, 1992).

The perceptions³³ of vice-rectors, academic school directors/heads of academic departments³⁴ and deans of the psychological forces embedded in the merging of two universities were investigated to obtain baseline scientific information in this regard. Such information may be used to improve future relations between the different campuses of the merged university.

DESCRIPTION OF FORCES

As stated in a previous article (chapter 2 above), Lewin (1938) first formulated the conceptual properties of the construct of force, as well as a definition co-ordinating it with observable processes. The conceptual and dynamic relation between psychological forces, valences and tensions was referred to, specifically in regard to the relation between need, environment and the 'mechanics' of locomotion. Lewin (1938) indicates that one outstanding property of a force is its directedness. However, he states that direction³⁵ in the psychological context cannot be defined as physical direction and cannot be determined by Euclidean geometry.

DOMAINS

In order for us to understand our situation adequately and for us to identify correctly what is needed to change it, we need to take a step back and look at the humanly perceived dimensions of the forces that seem to be affecting the institution. It is this human dimension, somewhat hidden, possibly not even openly communicated, that also needs to be focused on.

People as workers work in a system, in this instance, the higher education system. But how do they, the workers perceive or cognitively understand the changes caused by forces, and how do they feel about it emotionally or affectively? How are the results or movements of these forces in turn reacted upon conatively in the day to day working environment?

³³ This survey was conducted 30 months after the merger

³⁴ At the time of the survey the Mafikeng Campus had Heads of Departments

³⁵ Description of a force

Attitude has several psychological components. A cognitive attitude is a consciously held opinion, or belief, such as *"I believe that government has enforced the merger"*. The evaluative component concerns whether one considers a particular thing as positive or negative as in *"the force enacted by government is a serious threat."* The affective component concerns the emotional tone or feeling: *"Government as a force scares me"*. Each of these aspects is important in defining the conative component or disposition in influencing the action: *"I will not implement the government merger initiative."*

There are three domains according to which experiences, perceptions or attitudes can be grouped, and hence documented and compared: The affective domain is mainly determined by employees' attitude towards issues related to the working environment and is known as an emotional reaction (Antonovsky, 1987; Du Preez, 2001). The cognitive domain is mainly determined by employees' rational decision about issues related to the working environment (Du Preez, 2001). This includes external stimuli as clearly structured consequent information (Antonovsky, 1987). Employees will demonstrate certain (conative) behaviour as influenced by the employees' attitudinal (affective) and rational (cognitive) domains (Du Preez, 2001).

Constructing a framework of what is to be determined from respondents one has to find some way to depict such relationships without making the instrument too complex (and thereby impractical) or too simplistic. In seeking an organisational principle that would accommodate those demands, the work of Buss and Finn (1987) refers to the old tripartite system that has informed psychology over the centuries, one that recognised the three psychological domains; cognition, affection and conation. However, there are those who argue that the view of cognition/affection/conation as separate processes seriously misrepresents the unity of psychological processes. However, for purposes of this research, the domains are composed of cognitive, affective and conative dimensions.

METHOD

Research design

For purposes of this study, ex post facto (non-experimental) research was undertaken within this field by using a questionnaire as the research instrument (Huysamen, 1976). A structured closed-ended questionnaire was used (quantitative study) to collect data from academic school directors, deans and vice-rectors on all campuses of the institution. The questionnaire was piloted and corrected, after which the questionnaires were electronically distributed to the whole population. Data collected were then submitted to the Statistical Consultation Services of the North-West University for processing. Various statistical tests were conducted, including tests on reliability (Cronbach Alpha), validity (factor analysis) and d-values.

According to Neuman (1994), a survey is the most widely used data-gathering instrument in many fields of study. White (2003) explains that a questionnaire is an instrument with open- or closed-ended questions or statements to which a respondent must respond, and is the most widely used technique for obtaining information from subjects. Cohen et al. (2003) also remark that a questionnaire is a widely used instrument for collecting survey information providing structured and numerical data, as it can be administered without the presence of a researcher and it is comparatively straightforward to analyse. According to White (2003), closed-ended questionnaires only permit certain responses and the quantification and analysis of results may be carried out easily and very effectively. It should be used where the answer categories are discrete, distinct and relatively few in number. Neuman (1994) argues that the issue is not which form is the best, but rather under what conditions a form is most appropriate. A researcher's choice between an open- and closed-ended question depends on the purpose of a research project.

The advantages of a structured (closed-ended) questionnaire as research method could be summarised as follows: it is easier and quicker for respondents to answer; the answers of different respondents are easier to compare; answers are easier to code and analyse statistically; the response choices can clarify the meaning of a question for respondents; respondents are more likely to answer about sensitive

topics; there are fewer irrelevant or confusing answers to questions; less articulate or less literate respondents are not at a disadvantage; and replication is easier.

The disadvantages of a structured (closed-ended) questionnaire as research method, however, are: they can suggest ideas that the respondent would not otherwise have; respondents with no opinion or no knowledge of the relevant question can answer any way; respondents are frustrated because their desired answer is not a choice; it is confusing if too many response choices are offered; misinterpretation of a question can go unnoticed; distinctions between respondents' answers may be blurred; clerical mistakes or marking the wrong response is possible; it forces respondents to give simplistic responses to complex issues; and it forces people to make choices they would not make in the real world.

It is also necessary to understand the motivation for using a closed-ended questionnaire for this study. According to Cohen et al. (2003, p. 255), the following reasons are stated why a structured questionnaire was used: the relative ease of access by the population, in this instance spread over three campuses some distance removed from one another (interviews were not included since they would have been more time- and cost-consuming); objectivity of the test results would be ensured by the use of closed-ended questions; a structured questionnaire is relatively less expensive than interviews; respondents would be able to complete the questionnaires in their own time; the ease of processing closed-ended questionnaires in comparison with open-ended questionnaires; the anonymity of the respondents could be ensured if they decided to return a printed version of the questionnaire.

A consideration to be taken into account in designing the methodology of this research was timing. The University was still involved in finalising major issues during the early months of the first phase of this research, and no formal merger initiatives influencing the academic environment had been proposed or implemented or had hence impacted on academic managers. For this reason, the second part of the research was only conducted 30 months after the merger, which gave academic managers the opportunity to experience issues related to the merger.

Participants

The population or universe is the set of products, companies and markets of interest to the researcher. According to Visser (2002), the population to be researched should be well defined by the researcher. In this case the target population was the vice-rectors, academic school directors (excluding research directors) and deans on all the campuses of the North-West University, and these persons also comprised the study population. The purpose was to analyse the opinions of these senior academic officials who had been actively engaged in a merger. The total population was used and therefore no sampling was done. In all cases the questionnaire was sent out by e-mail. Questionnaires were distributed to 67 respondents.

Of the total of 67 targeted in the study population, 31 questionnaires, representing 46,2%, were received back but only 22 of these questionnaires, or 32,8%, could be used as the rest had been completed incorrectly³⁶. Therefore, no deductions can be made that can be generalised to either of the campuses or the institution itself. Only tendencies can be observed in this group of respondents. Tendencies that are of significant practical value are reported. The intention is to provide directives from this study by the compilation of guidelines based on the outcomes achieved through the survey to serve as directives in merged higher education institutions.

As the questionnaire was e-mailed to respondents, it could be determined whether or not the e-mail had been opened. Three persons deleted the e-mail without opening it, whilst five persons had not opened the e-mail by the time the questionnaires had to be returned.

The majority of respondents (77,3%, or 17 out of 22) were from the Potchefstroom campus. Two responses, representing 9,1%, were received from the Mafikeng campus, whilst three responses (13,64%) were received from the Vaal Triangle campus. The majority of respondents (90,9%, or 20 out of 22) indicated that they were directors/HODs, while the remaining two respondents (9,1%) indicated that they were deans. The majority of respondents, namely 50% (11 out of 22) indicated

³⁶ It can be assumed that the nine questionnaires completed incorrectly were due to a lack of computer literacy.

that they had been in their present positions for longer than five years. Only three respondents (13,6%) indicated that they had been in their present positions for less than one year. 95% of respondents indicated that they were employed on the Potchefstroom campus on 1 January 2004, the date the merger took place. 81,8% of respondents were male and the remaining 18,2% were female.

Data collection and procedure

Questionnaires are used in research to collect in writing information that is not normally visible, namely with regard to behaviour, attitudes and beliefs or opinions, characteristics, expectations, classification and knowledge (Neuman, 1994, p. 222). White (2003, p. 66) suggests the following guidelines for drafting effective questions or statements in the questionnaire: make items clear; write items so that respondents are competent to respond to them; items should be relevant; simple items are best; negative items should be avoided; and biased items or terms should also be avoided.

According to Ary et al. (1996, p. 429), the structure of the questionnaire should comply with the following requirements: it should not be too long; it should provide sufficient information; it must be interesting; it must be constructed in such a way that it is easy to complete; items must be numerically listed; and instructions should be clear.

A structured closed-ended electronic questionnaire was compiled from information in chapter 2. Respondents were required to make choices in the questionnaire on a 4-point Likert scale (Steyn, 2005; Huysamen, 1976), varying from 1 (not at all) to 4 (to a large extent). Respondents had the choice to submit the questionnaire either in electronic format or in hard copy. The questionnaire was easy to complete and the option for each question could easily be selected. Although the acting of each force on the merger agenda constituted an integral part of the merger process, this research focused on consolidating these acts associated with forces into some sorts of clusters. The research questions were designed to collect data on the types of forces and how they were experienced.

All records of questionnaires of respondents (including statistical data), whether complete or incomplete, electronic correspondence with respondents, dates of electronic delivery of questionnaires, when these were electronically opened by respondents and electronic discussions with respondents have been stored. Several questionnaires were received in hard copy but were incomplete and therefore could not be used. The researcher reviewed the individual responses on the questionnaires of the correctly completed 22 questionnaires with the intention of transferring information from questionnaires to a format suitable for statistical analysis.

The researcher attempted at all times to ensure that data is accurate, consistent with the intention of the questions and other information in the survey, that data were uniformly entered, complete and so arranged as to simplify coding and tabulation (see Cooper & Schindler 2001, p. 423). After the transfer of the data, data were organised and coded in order to be analysed. Coding implies that the variable to be statistically analysed has to be identified and a decision taken on various code values represented by such variable (Welman & Kruger, 1999, p. 208). Through coding of raw data, data are transformed into symbols that may be tabulated and counted (Churchill, 1991, p. 687). The researcher did not complete any incomplete answers, thereby avoiding the creation of misrepresentation or bias in the study. After the editing and coding of data, data were processed.

Data processing and statistical analysis

The questionnaires were coded prior to data capturing by the researcher in collaboration with the Statistical Consultation Service of the North-West University (Potchefstroom campus) for statistical analysis. Responses were captured directly from the questionnaires by the Statistical Consultation Service. Data was then processed with the aid of the SAS programme (SAS System for Windows Release 9.1 TS Level 1M0, 2002-2005). For the purpose of this study, descriptive statistics and one-way analysis of variance were used to indicate the statistically differences between the constructs. The Cohen d-values (Steyn, 2005) were calculated to indicate the practically significant differences between constructs.

A confirmatory exploratory factor analysis was used to assess validity. The Cronbach alpha coefficient was used to assess reliability. The reliability of a test refers to the consistency of scores obtained by the same persons when they are re-examined with the same test on different occasions, or with different sets of equivalent items, or under other variable examining conditions. The validity of a test concerns what the test measures and how well it does this (Anastasi & Rhodes, 2000). It then measures what it is supposed to. According to Mitchell and Jolley (2001, p. 115), reliability is the extent to which a measure produces stable and consistent scores. A measure can be reliable but not valid, but if a measure is not reliable it cannot be valid. Reliability is a prerequisite for validity. Furthermore, reliability is necessary for validity and is easier to achieve than validity. The degree of intercorrelation among the variables and the appropriateness of the factor analysis were determined by Kaiser's measure of sampling adequacy (MSA) (see table 5). This index ranges from 0 to 1, reaching 1 when each variable is perfectly predicated without error by the other variables (Hair et al., 1998).

According to Cronbach (1970, p. 309), factor analysis is a systematic method for the examination of the meaning of a test by studying its correlation with other variables and the basic idea is that of simple correlation itself. A factor analyst introduces latent composite variables also known as factors that can be interpreted and describes the test by its relation to key variables (Cronbach, 1970, p. 312). Interrelated items are combined as factors to describe the latent variables. Factor analysis is considered a general method of inquiry in an attempt to minimise some of the misuses of the past. Furthermore, its success is dependent upon the careful choice of variables and subjects to ensure all variables of interest correlate highly with other variables (Nunnally, 1978, p. 447).

Because a random selection of respondents was not done, the practical significance between only certain constructs was determined by using Cohen's *d*-value (Steyn, 2005). The findings of this research would only report practically significant tendencies but findings would not be generalisable to the whole institution's academic management or population.

Validity was determined by means of factor analyses only of questions related to each construct. This was performed to confirm the unidimensionality of the factors. The measure of sampling adequacy (MSA) was also determined. If an MSA is smaller than 0,5 the correlation matrix cannot be used for factor analysis.

RESULTS

Tables 1, 2 and 3 provide an overview of the mean and standard deviation of each item included in the questionnaire.

From Table 1 where items related to the affective domain are listed it can be derived that respondents felt:

- the least positive towards council (1,45), while they felt the most positive towards management (3,40);
- the most positive about the way in which management had directed and moved with the merger (2,82), while they felt the least positive about the direction and movement of council (1,41) and government (1,68);
- that council was acting as a barrier³⁷ to the implementation of the merger (3,59), more than they felt like this towards management (1,64); and
- that the merger strategy was not a barrier to the implementation of the merger (1,77).

³⁷ For other interpretations these values were reversed due to the negative nature of the concept "barrier"

Table 1

Descriptive Statistics of Scores on Items³⁸ related to Affective Domain (N=22)

Item ³⁹	Mean	SD
A Personally I feel positive:		
A1 Towards government's merger initiative	2,32	1,25
A2 Towards management	3,40	0,85
A3 Towards council	1,45	0,74
A4 Towards my peers on the other campuses	2,64	0,90
A5 About students' and alumni's support for the merger	2,18	1,00
A6 About the strategic direction of the merger	2,78	1,07
A7 About the culture of the university due to the merger	2,27	0,98
A8 About the financial and resource future of the university	2,27	0,88
D Personally I feel positive about the direction:		
D1 In which government moved with the merger	1,68	0,72
D2 In which management moved with the merger	2,82	1,10
D3 In which council moved with the merger	1,41	0,73
D4 In which my peers have moved on the other campuses	2,23	0,92
D5 In which students and alumni have moved in support of the merger	2,36	0,90
D6 Of the merger strategy	2,68	0,99
D7 In which the university culture is heading	2,50	0,86
D8 Of finance and resource allocation	2,55	0,80
J Personally I feel that:		
J1 The government is acting as a barrier to the implementation of the merger	2,23	1,27
J2 Management is acting as a barrier to the implementation of the merger	1,64	0,95
J3 Council is acting as a barrier to the implementation of the merger	3,59	0,96
J4 My peers on the other campuses are acting as barriers to the implementation of the merger	2,09	0,81
J5 Students and alumni are acting as barriers to the implementation of the merger	1,73	0,55
J6 The merger strategy is a barrier to the implementation of the merger	1,77	1,07
J7 The different campus cultures are barriers to the implementation of the merger	2,50	1,14
J8 The provision of financial and resource support is acting as a barrier to the merger implementation	2,59	1,22

³⁸ No results were reversed.

³⁹ Item numbering for purpose of analysis.

Respondents also reacted to items linked to the cognitive domain, and these responses are listed in Table 2.

Table 2

Descriptive Statistics of Scores on Items⁴⁰ related to Cognitive Domain (N=22)

Item ⁴¹	Mean	SD
B Personally I understand:		
B1 Why government initiated the merger	2,86	1,17
B2 The way in which management steers the merger	2,91	1,27
B3 The way in which council governs the merger	1,45	0,85
B4 The feelings of my peers on the other campuses	2,77	1,15
B5 The feelings of students and alumni towards the merger	2,23	0,97
B6 The strategy behind the merger	2,32	1,17
B7 The impact the merger might have on the culture of the university	2,59	1,10
B8 The resource and financial implications of the merger	2,73	1,08
E Personally I understand the direction in which:		
E1 Government is heading with the merger	2,14	1,08
E2 Management is heading with the merger	2,82	1,05
E3 Council is heading with the merger	1,41	0,67
E4 My peers on the other campuses are heading due to the merger	2,18	0,80
E5 Students and alumni are heading due to the merger	2,23	0,81
E6 The merger strategy is heading	2,55	1,06
E7 The university culture is heading	2,27	1,12
E8 Resource and finance allocation is heading	2,45	1,10
H Personally I express understanding:		
H1 As to why government fast-tracked the merger initiative	2,09	1,23
H2 As to why management is implementing the merger at the present pace	2,86	1,17
H3 As to why council is governing the merger in the present way	1,45	0,80
H4 For the pace at which my peers on the other campuses react	2,09	0,87
H5 For the pace at which students and alumni reacted towards the merger	2,27	0,88
H6 For the speed at which the merger strategy is being implemented	2,59	1,26
H7 For the tempo at which the culture of the university is being shaped	2,41	1,05
H8 For the speed at which resources and finances are being made available in support of the merger	2,32	0,95

⁴⁰ No results were reversed

⁴¹ Item numbering for purpose of analysis

From Table 2 it can be derived that respondents:

- understood reasonably well why government initiated the merger (2,86) and that it would have resource and financial implications (2,73);
- had the least understanding for the way in which council governed the merger (1,45), while they expressed the most understanding for the way in which management steered the merger (2,91);
- expressed a higher understanding of why management was implementing the merger at the present pace (2,86) than why council was governing the merger in the way it did (1,45);
- expressed the most understanding for managements' position (3,05), a reasonable understanding of the government's position (2,63) and the least understanding for the position of council (1,41); and
- had the most understanding for the direction in which management was heading with the merger (2,82), while they had the least understanding for the direction in which council was heading with the merger (1,41).

Respondents also indicated the extent to which they were of the opinion that they acted towards items linked to conation. These scores are listed in Table 3.

Table 3

Descriptive Statistics of Scores on Items⁴² related to Conative Domain (N=22)

Item ⁴³	Mean	SD
C Personally I act in a way that supports:		
C1 Government's merger initiative	2,95	0,79
C2 Management to steer the merger	3,32	0,72
C3 Council to govern the merger	2,05	1,00
C4 My peers on the other campuses	2,86	0,89
C5 Students' and the alumni's understanding of the merger	2,68	0,84
C6 The merger strategy	2,73	1,03
C7 The shaping of a new university culture	3,05	0,90
C8 The limitation in terms of resources and finances	2,86	0,99
F Personally I act in a way that supports:		
F1 Government's direction with the merger	2,55	1,01
F2 Management's direction with the merger	3,05	0,79
F3 Council's direction with the merger	1,68	0,84
F4 The direction in which my peers on the other campuses are moving due to the merger	2,41	0,80
F5 The direction students and alumni are taking due to the merger	2,32	0,95
F6 The merger strategy	2,95	0,84
F7 The shaping of a new university culture	2,68	0,99
F8 The limitations in terms of resources and finances	3,00	0,82
G Personally I support the speed at which:		
G1 Government has enforced the merger	1,86	1,13
G2 Management has implemented the merger	2,86	1,32
G3 Council has governed the implementation of the merger	1,45	0,74
G4 My peers on the other campuses have reacted	2,03	0,81
G5 Students and alumni have expressed their opinion about the merger	2,50	0,74
G6 The merger strategy is being implemented	2,77	1,07
G7 A new University culture is being shaped	2,55	1,10
G8 Finances and resources are made available in support of the merger	2,05	0,72

⁴² No results were reversed

⁴³ Item numbering for purpose of analysis

Table 3

Descriptive Statistics of Scores on Items⁴⁴ related to Conative Domain (continued)

Item ⁴⁵		Mean	SD
<i>I</i> ⁴⁶	Personally I act in a way that supports:		
/1	The speed at which government wants to finalise the merger implementation	2,41	0,85
/2	The speed at which management is steering the merger	2,86	0,99
/3	The speed at which council is governing the merger	1,50	0,67
/4	The pace at which my peers on the other campuses are contributing towards the merger	2,41	0,67
/5	The reactions of students and alumni due to the merger	2,32	0,95
/6	The speed at which the merger strategy is being implemented	2,55	1,14
/7	The speed at which a new university culture is being shaped	2,50	1,06
/8	The speed at which resources and finances are made available in support of the merger	2,36	0,90
L	Personally I act in a way that supports:		
L1	Government in the merger	3,00	1,02
L2	Management in the merger	3,36	0,79
L3	Council in the merger	1,68	0,95
L4	My peers in the merger	2,77	1,02
L5	Students and alumni in the merger	2,55	0,80
L6	The merger strategy	3,05	0,90
L7	The cultural change	2,77	1,11
L8	The way in which resources and finances are allocated in the merger	2,95	0,95

From Table 3 it can be derived that respondents:

- acted more in a way that supported management to steer the merger (3,32) than they acted in support of council to govern the merger (2,05), yet they acted to a fair extent in support of government's merger initiative (2,95);
- acted more in support of managements' direction with the merger (3,05) than they acted in support of the direction of council with the merger (1,68);
- acted more in support of the speed at which management had implemented the merger (2,86), that they showed less active support for the speed at which government enforced the merger (1,86), whilst the least support was expressed for the speed at which council has governed the merger implementation (1,45);

⁴⁴ No results were reversed

⁴⁵ Item numbering for purpose of analysis

⁴⁶ "I" Printed in *italic* to be distinguished from a 1

- acted more in support of the speed at which management had steered the merger (2,86), acted to a fair extent in support of the speed at which government wanted to finalise the merger implementation (2,41), while they expressed the least active support for the speed at which council was governing the merger (1,50); and
- acted most in a way that supported management in the merger (3,36) whilst the least support was expressed for council (1,68).

In every instance it was management and council that ended up at the two ends of the continuum. Other choices included government, peers, students and alumni, the merger strategy, cultural change and resources and finances. As management and governance issues seem to be positioned at opposite ends of the continuum a further analysis will be conducted where the means for all questions related to each force are determined as a construct. For purposes of this research and due to the limitation on the length of this article the focus will only be on government, management, council and culture (see Table 4).

To ensure that the data (domain⁴⁷ and theme/force) derived are valid, construct validity was determined for each construct. Construct validity refers to the degree to which the intended construct is measured. According to Cronbach (1970, p. 142), construct validation is an analysis of the meaning of test scores in terms of concepts or constructs. Cronbach (1970, p. 143) furthermore states that the derived constructs could account for test performance. Cronbach's alpha is the mean reliability coefficient calculated from all possible split-half partitions of a measurements scale (Dillon et al., 1993, p. 823). It is possible to determine the proportion of true score variance by computing the sum of item variances with the variance of the sum scale by using the formula: $\alpha = (k/(k-1)) * [1 - \sum (s_i^2) / s_{sum}^2]$

This formula is used for the most common index of reliability and is known as Cronbach's coefficient alpha (α). The coefficient alpha will be zero if there is no true score, but only an error in the items, and then the variance of the sum will be the same as the sum of the variances of the individual items. If all items were perfectly reliable and measured the same thing (true score), then the coefficient alpha would

⁴⁷ Affective, Cognitive, and Conative

be equal to 1 (StatSoft, 2004). Table 4 represents the grouping of items or questions as part of constructs, with their respective Cronbach alpha coefficients.

Table 4

Clustering of Questions into Constructs

Constructs	Questions (Items)	Cronbach Alpha (α)
Affective towards Government	A1; D1; J1	0,75
Affective towards Management	A2; D2; J2	0,80
Affective towards Council	A3; D3; J3	0,92
Affective towards Culture	A7; D7; J7	0,59
Cognitive towards Government	B1; E1; H1; K1	0,87
Cognitive towards Management	B2; E2; H2; K2	0,96
Cognitive towards Council	B3; E3; H3; K3	0,96
Cognitive towards Culture	B7; E7; H7; K7	0,93
Conative towards Government	C1; F1; G1; I1; L1	0,90
Conative towards Management	C2; F2; G2; I2; L2	0,90
Conative towards Council	C3; F3; G3; I3; L3	0,93
Conative towards Culture	C7; F7; G7; I7; L7	0,90

The Cronbach alpha reliability coefficient measured between 0,75 and 0,96 for all constructs except for “Affective towards Culture” with $\alpha=0.59$. It may therefore be deduced that all these constructs are reliable in the context where they are used.

As stated before, a measure can be reliable but not valid, but if a measure is not reliable it cannot be valid. Reliability is therefore a prerequisite for validity. Furthermore, reliability is necessary for validity and is easier to achieve than validity. Having established reliability, construct validity is to be determined by means of the degree of intercorrelations among the variables and the appropriateness of the factor analysis. This was done by Kaiser’s measure of sampling adequacy (MSA) (see table 5). The latter index ranges from 0 to 1, reaching 1 when each variable is perfectly predicated without error by the other variables.

Table 5

Variance, Retained Factors, Measuring of Sampling Adequacy (MSA) and Communalities

Construct	(α)	Variance Explained	Retained factors	Overall MSA	Communalities
Affective towards Government	0,75	67,97%	1	0,64	59%-79%
Affective towards Management	0,80	72,73%	1	0,66	59%-81%
Affective towards Council	0,92	87,50%	1	0,74	83%-90%
Affective towards Culture	0,59	95,00%	2	*0,38	92%-99%
Cognitive towards Government	0,87	74,10%	1	0,74	83%-93%
Cognitive towards Management	0,96	85,51%	1	0,81	83%-93%
Cognitive towards Council	0,96	85,51%	1	0,80	83%-88%
Cognitive towards Culture	0,93	93,33%	2	0,65	91%-98%
Conative towards Government	0,90	72,81%	1	0,83	42%-91%
Conative towards Management	0,90	64,10%	1	0,71	64%-87%
Conative towards Council	0,93	67,02%	1	0,77	7%-90%
Conative towards Culture	0,90	65,85%	1	0,64	55%-74%

* Correlation matrix not suitable for factor analysis

From Table 5 it can be derived that sufficient variance for each construct has been achieved because all constructs measure higher than 60%⁴⁸. The degree of intercorrelations among the variables and the appropriateness of the factor analysis were determined by Kaiser's MSA. In this instance, the factor analysis of only one construct, namely *affectivity towards culture*, measured lower than 0,50, and therefore the correlation matrix was not suitable for factor analysis. All the remaining constructs' factor analysis can be declared valid because they are larger than 0,50. All the items in each of these constructs sufficiently contribute to each construct. Communalities lower than 50% indicated that there were questions for which sufficient variance could not be declared from the extracted factors. Attention is therefore paid to the interpretation of factors with either communalities or MSAs lower than 50%. The limited amount of data due to a limited response might have contributed to communalities and MSAs being smaller than 50%.

⁴⁸ Minimum required 50%

The descriptive statistics associated with each construct are summarised in Table 6.

Table 6
*Descriptive Statistics Constructs associated with Forces*⁴⁹

Domain	Theme/Force	N	Mean	SD
Affective	Government	22	2,26	0,90
	Management	22	3,20	0,82
	Council	22	1,42	0,75
	Culture	22	2,42	0,74
Cognitive	Government	22	2,43	1,03
	Management	22	2,91	1,08
	Council	22	1,43	1,08
	Culture	22	2,44	1,00
Conative	Government	22	2,55	0,82
	Management	22	3,09	0,79
	Council	22	1,67	0,74
	Culture	22	2,70	0,87

From the above table (Table 6) it can be derived that during the time of the survey respondents:

- expressed the most affectivity towards management (3,20) and the least for council (1,42);
- expressed the most cognitive understanding for management in the merger (2,91) and the least for council in the merger (1,43); and
- indicated that they acted (conatively) most in support of management (3,09) and least in support of council (1,67).

Having established the construct validity the practical significant differences between constructs were also determined using the d-value of Cohen (Steyn, 2005), with the aid of the following statistical formula:

$$d = \frac{|\bar{x}_1 - \bar{x}_2|}{s_{\max}}$$

Where $|\bar{x}_1 - \bar{x}_2|$ is the difference between $\bar{x}_1$ and $\bar{x}_2$ without taking the sign into consideration and $s_{\max}$ = maximum of s_1 and s_2 , the sample SDs, where $\bar{X}$ = Mean and SD = Standard deviation.

⁴⁹ All results of questions referring to "barrier" were reversed due to the negative nature.

The effect sizes were determined according to the following criteria (Ellis & Steyn, 2003):

Small effect size: $d = 0,2$; Medium effect size ($^{\wedge}$): $d = 0,5$; Large effect size (*): $d = 0,8$

According to Ellis and Steyn (2003), data with $d \geq 0,8$ should be considered practically significant, since it is the result of a difference having a large effect. The differences between constructs are listed in Table 7.

Table 7
Effect Size Difference between Constructs

Constructs	Mean Difference	SD Difference	D-Value
Affective			
(1) Management – Government	1,02	1,07	*0,95
(2) Management – Council	1,86	1,11	*1,68
Cognitive			
(3) Management – Government	0,51	1,14	0,45
(4) Management – Council	1,53	1,40	*1,10
Conative			
(5) Management – Government	0,56	0,93	$^{\wedge}$ 0,61
(6) Management – Council	1,53	1,38	*1,11

From Table 7 the following can be derived:

- A large effect size ($d=0,95$) of the responses linked to affectivity exists between management and government. This means that while respondents were in practice positive towards management, they were negative towards government (also see Table 6). A practically significant difference therefore exists between the affectivity towards management and the affectivity towards government with regard to the merger.
- A large effect size ($d=1,68$) of the responses linked to affectivity exists between management and council. This means that while respondents were to a large extent positive towards management they were negative towards council, (also see Table 6). A practically significant difference therefore exists between the affectivity towards management and the affectivity towards council with regard to the merger.

- A small to medium effect size ($d=0,45$) of the responses linked to cognitive (understanding) exists between management and government. This might indicate that respondents expressed more understanding for management than for government within the merger, but this was not practically significant (see Table 6).
- A large effect size ($d=1,10$) of the responses linked to cognitive (understanding) exists between management and council. This means that respondents to a large extent expressed positive cognition (understanding) towards management, in the same way they expressed negative cognition (understanding) towards council. A practically significant difference therefore exists between cognition towards management and cognition towards council with regard to the merger (see Table 6).
- A medium effect size ($d=0,61$) between the responses linked to the conative domain (acting) exists between management and government. This means that respondents act more positively towards management than they do towards government within the merger (see Table 6). Therefore, a substantial difference exists between the acting or doing in the merger as regards management than regards government.
- A large effect size ($d=1,11$) of the responses linked to the conative domain (acting) exists between management and council. This means that while respondents will act much more positively towards management they would act negatively towards council (see Table 6). A practically significant difference therefore exists between the conative (acting) towards management and the conative (acting) towards council, with regard to the merger.

DISCUSSION

Although the merging of higher education institutions has evoked much debate since it was announced, few efforts have been spent on determining how academic managers reacted to the forces forming part of the merger process. In this study a limited attempt was made to assess the opinions of academic managers in the cognitive, affective and conative domains linked to a limited amount of pre-identified

thematically grouped forces that in some or other way intentionally or unintentionally impacted on the merger process.

In this study the researcher accounted for two ends of the force continuum, namely those associated with management and those associated with governance. The management task is the responsibility of the university's management and governance is that of council, but also of government.

Based on the feedback from respondents it could be derived that government acted as a limited restraining factor in the merger process due to its autocratic way of announcing and enforcing the merger. The bias of government became evident with the appointment of council members, where government selected candidates that favoured government. This move from government could be described as the cause for council being selected by respondents as the largest restraining factor in the merger process and not government itself. Government evidently overplayed its governance role by contributing to the establishment of a perceived disruptive council that was not trusted by academic managers that participated in this research. Academic managers who participated in this research clearly indicated that they were negative towards anything stemming from council. Respondents furthermore indicated to an overwhelming extent that they did not have any understanding for the way in which council acted or moved within the merger. Respondents also indicated that their own behaviour and way of operating within the merger was not in support of council.

The contrary with regard to the university's management team was established when respondents indicated that they understood management's actions within the merger.

This merged higher education institution is facing a variety of immediate pressures as academic management seeks to do its best in an uncertain and rapidly changing environment. For many years they have enjoyed the comfort of being autonomous institutions. If they are going to operate as a successfully merged institution, they need to retain the desirable traditions of the former autonomous institutions in a new institutional culture. It is looking increasingly as if they will need to find their own way

of ensuring merger success, rather than relying on national road maps emerging from statements of government policy and agendas.

Indeed, it is apparent that many of the pressing concerns which the institution has to deal with are not always amenable to solution by government intervention. Many issues are often overlooked by politicians, ministers and departmental officials, yet government invade the heart of the university by announcing mergers. Dealing with the merger will require reappraisal of university traditions and practices and a joint effort to establish shared and new traditions and practices in the merged institution. It seems that government should afford merged higher education institutions greater flexibility and avoid measures that enforce uniformity. The success of the mergers will ultimately depend on the willingness of the merging partners for it to succeed. Government (just like parents and teachers) cannot force HEI to be successful in their merging effort.

The purpose in this study was:

- To collate information about the psychological forces in the merger as perceived by academic school directors, deans and vice-rectors.
- To determine whether any differences existed in terms of the forces linked to the cognitive, affective and conative psychological domains or dimensions as constructs.

RECOMMENDATIONS

Given the results of this study, the following recommendations are made on how the psychological conceptualisation of forces could be utilised in the future development of the newly established (merged) university. It is recommended that further research linked to forces in higher education be conducted. An effort to ensure participation from colleagues on campuses that were underrepresented or not represented at all in this study must be considered.

It is recommended that constructs with limited effect as a force possibly be omitted in a future project due their limited influence, as indicated by the present findings. It is

recommended that the influence of council on the overall performance and impact of the university be determined.

It is recommended that a larger participating population could add substantial value. It is recommended that it could also be investigated how effectiveness could be ensured by means of reasonable distribution of resources without overloading or underutilising certain sub-populations of staff. Much time and effort, and hence money, are possibly being spent on issues that will prove to render no return on investment.

Author's Note

The views expressed, issues of interpretation, and questions of inclusion or omission remain the responsibility of the researcher and do not necessarily reflect the views of the North-West University.

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CHAPTER 4

CONCLUSIONS, SHORTCOMINGS AND RECOMMENDATIONS

Chapter 4 includes a summary based on the findings in both the quantitative and the qualitative empirical studies. Furthermore, some conclusions are drawn and shortcomings or limitations of the research are discussed. Finally, recommendations are made in terms of related future research.

4.1 CONCLUSIONS

The general objective of this study was to investigate the forces embedded in the merging of the Potchefstroom University for Christian Higher Education, the University of North West (in Mmabatho) and the incorporation of the Sebokeng campus of the VISTA University into the North-West University.

This research indicated that the merger phenomenon and the forces behind it reasonably need to be taken seriously. The perceptions of two former vice-chancellors six months into the merger clearly indicated a large amount of discomfort with the process. Despite the amount of negative forces and the perceptions academic managers had about it the management team of the merger university were supported by participating academic managers and therefore came out clear. For this they personally need to be congratulated, possibly by council, former council members, government and possibly also the former minister of Education, Kader Asmal.

The extent to which the management team of this institution, under difficult circumstances, with constant opposing forces succeeded in ensuring trust amongst academic managers could possibly bear fruit in future. The findings, as they relate to the objectives set for this research, can be summarised as follows:

The first objective was to conceptualise some psychological forces within the context of merging higher education institutions through qualitative investigation;

From the results it can be concluded that a variety of thematically grouped forces were identified which included government that was perceived as a force with power that acted not collaborative but autocratic by constructing both the game and rules with no clear educational motive. As indisputable force with a legitimate juridical base they enforced transformation with political correctness. Although respondents were disorientated, angry, and frustrated they could do nothing to overturn governments' decision and decided to manage it, particularly because none of the merging universities had the appropriate political power base to avoid the merger challenge with government. Although the minister of education had little empathy for the position of the respondents' constituencies, the possibility of an improved university management was visualised and with this as driving force for the merger the management team largely overturned negativity of staff into trust. The Council at the time of the research provided limited direction with the implementation of the merger possibly due to political influence or other hidden agendas that were not determined in this research. Peers had their reservations causing some psychological distance due to differences in culture or values. Although students and alumni were mentioned they were mainly referred to in a positive sense as the futuristic breed. Much difficulty was expressed with the merger strategy because staff had to support the strategy. The differences in campus cultures were highlighted as well as strenuous resource implications as possible forces within the merger context.

The second objective was to quantitatively determine the perceptions and attitudes of academic school directors, deans and vice-rectors at the selected institutions' campuses towards the thematically identified psychological forces grouped into constructs. The psychological domains were linked with the forces to form the constructs. All constructs delivered a Cronbach reliability coefficient between 0,59 and 0,96. It was also determined that sufficient variance could be declared for each construct because they all measured higher than 60%. The degree of inter-correlations among variables and the appropriateness of the factor analysis indicated that the construct *"affectivity towards culture"* was not suitable for factor analysis. Some communalities, (those lower than 50%) indicated that there were some questions in two constructs with insufficient variance. These included conation towards government and conation towards council.

Practical significant differences were found between respondents' affectivity towards management and government, management and council; cognition of management and council while an insignificant difference was found between respondents' cognition towards management and government. Practical significant differences were furthermore found between respondents' conation towards management and government, and management and council.

The final objective was to make recommendations on how the psychological conceptualisation of forces could be utilised in the future development of the newly established (merged) university.

What we need to know before action is taken, is whether a threat is really significant. Emotional problems emerge from old learning. The data received from this target population have not been actively involved in the negotiations towards the merger. This possibly influenced their school of thought. Situations requiring group decisions are complicated, more so in a heterogeneous, language, race, religion, cultural environment such as this. Because group decisions can be arrested by politics scientific data and empirical checks can act as reality checks, but only if those with the ability or authority to act are willing to listen. In this instance those responsible for governance but to a lesser extend also management to take note of the circumstances.

Certainly no credence can be given to the notion that the university structures were changed, resulting in a merger due to the outcome of comprehensive research results that have yielded evidence moving the institution in one direction or another. Instead, it seems that mainly the governing forces namely government and council and people driving them often tend to extract, only those elements that seem supportive of the (merger) idea that they wish to promulgate and to ignore those that do not seem to support the current fashion (see Gallagher, 1989). The evidence that the move towards the merger was not based on scientific empirical research was caused by the collective decisions that were made based on the relative power of competing factions.

Of course, individual and collective paradigms are largely preformed before new facts are encountered, and they will predispose us toward certain propositions. Different kinds of training will change how a person organises and interprets data. A layperson's merger knowledge will differ from that of an academic manager at a university, regardless of his or her political opinions. Differences in disposition become problematic in any debate where the stakes are potentially high. A common fault is to highlight the affective, or emotional, component of an opponent's disposition while forgetting your own. Preformed disposition goes beyond personal interests for or against an idea. Emotional disposition affect how humans see the world, especially when the evidence for a threat or promise has an element of ambiguity.

With the obtained results on forces in the merging of this university as a case study it would seem that the university management clearly accepted the merger initiative. Government and to larger extent the council seems not to have had a positive influence on academic managers who participated as respondents. Despite this restraining environment the university management largely convicted and convinced the respondents by the way they engaged in the merger to be trusted and to be supported. The possible future success of the merger would be a return on the investment management made to built trust among its academic managers in terms of the vision of the merged institution.

The government interventions or experiments that resulted in the mergers of HEI's, together with other interventions like the establishment of the CHE and the HEQC and the resulting quality drives, came dangerously close at destabilising Higher Education in South Africa. Roleplayers all over the Higher Education sector are concerned about the general wellness of staff in the sector. The cost of the merger interventions could result in a tired and burnt out work force. The traditional role of HEI to do research for example, could have been inhibited heavily with these processes.

4.2 SHORTCOMINGS AND LIMITATIONS

The limited amount of respondents that participated in both the qualitative and quantitative survey caused the findings not be generalised to the whole population. This also contributed to a measure of sampling adequacy (MSA) of less than 50% for *"affectivity towards culture."* A further limitation was caused with the identification of communalities lower than 50%, which indicated that there were questions linked to conation towards both government and council of which no sufficient variance could be declared.

Furthermore no comparisons could be conducted based on any biographic or demographic data due to the limited responses.

A further limitation was the inability to relate the psychological forces with the core business of a university namely teaching, learning, research and community engagement/implementation of expertise.

4.3 RECOMMENDATIONS

4.3.1 Recommendations for the merged institution

The merger brought along much change. What the future holds for this institution still needs to be seen. The future of this institution is possibly largely depicted by the imagination of those working in it. Since this research was conducted the council of this institution has undergone significant changes.

The following recommendations, based on the findings, should be considered:

- It is suggested that a follow up on this research be conducted with an improved response rate from all campuses and possibly including research directors and all support services directors into the target population. This might produce substantially different results.

- It is suggested that directors working in the Institutional Office of the University also partake in the research. They liaise with senior staff, academic and non academic, on all campuses on a daily basis and could possibly produce results that could be compared with those of campuses.
- It is suggested that with an envisaged larger response rate with follow-up research, campus comparisons should be conducted on data received, regarding the Institutional Office as fourth “unit” to compare with campuses.
- It is suggested that periodic reality checks of how the merger and the forces working in it are perceived to inform management.

4.3.2 Recommendations for future research

To obviate limitations in future research, certain recommendations can be made for future studies. The most important recommendation is the use of longitudinal designs. These designs can be used to validate further the relationships of psychological forces as clusters and to examine whether the reported links of psychological domains to the forces hold true over time.

The move towards more sophisticated theoretical models and structural equation modelling of forces can be another important topic for future research. The relationship between restraining and contributing factors in a merged university environment could be established. Although the concepts of restraining factors or forces and contributing factors or forces between employees and both university management and council were not accounted for in this study, future research should include the positive interface.

Research should investigate the extent of the influence of management and council on the working environment. When using information from academic and support staff in the university working environment, new insights and perspectives on the relationship between management, council and university staff will be provided. Another new focus for research in the psychological forces interaction domain can

be the examination of the relationships between biographical and demographical variables and the perceived forces on the one and work performance on the other hand.

A further recommendation concerns the need for investigation of the various job positions in the university, possibly post levels peromnes 8 and higher and their conceptualisation of the psychological forces. Since working conditions are unique within the different job positions they are influenced by either internally or externally perceived forces.

Future research could make use of larger populations. Another direction for research could be to do a national study in all merged higher education institutions. Future research could attempt to establish a clear relationship between forces and psychological domains. Research could also include a comparative study of campus cultures as a force and their influence or effect (contributing or restraining) on the institutional performance (as a unified entity) in terms of its core business, namely teaching, learning, research and community engagement/implementation of expertise.

A last recommendation concerns the need for investigation of the political influence university councils might have and how this influence either serves as enabler in creating an environment that is conducive to proper work performance or as a restraining factor that impacts negatively on work performance and hence on the core business of the university.

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