

# TRANSFORMATIONAL LEADERSHIP IN MERGING HIGHER EDUCATION INSTITUTIONS: A CASE STUDY

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## ABSTRACT

**Orientation:** The use of transformational leadership in the implementation of merger and incorporation policy in the higher education sector is well documented in other parts of the world and not in countries in transition like South Africa.

**Research purpose:** The objectives of this study were to establish an understanding of 'transformational leadership' and to determine the extent to which it was employed by leaders in an institution of higher education which had incorporated another institution.

**Motivations for the study:** The study provides a starting point, not only for the successful implementation of higher education changes in the future but also the building of leadership commitment and alignment to the proposed changes in the sector as well as the development of institutional leadership teams to take responsibility for any other transformation processes.

**Research design, approach and method:** The population of the study consisted of 350 full-time employees of the institution who had experienced the incorporation process. Two samples – one consisting of six executive management leaders and the other consisting of 153 employees – were used. Both qualitative and quantitative research approaches were employed using the case study method.

**Main findings:** Results showed that transformational principles of idealised influence, intellectual stimulation, and inspirational motivation principles were used more than others and that employees were generally not satisfied with how the incorporation process had taken place.

**Practical/managerial implications:** The results of the study affected the attitude and satisfaction of the employees in this study.

**Contribution/value-add:** The study reveals that leaders in the institution played key roles such as shared vision, team work and the creation of an enabling environment. An important point that has emanated from this study is the evidence that during transformation, a lack of strategic direction and empowering of followers and capacitating them leads to dissatisfaction with the whole process, despite the transformation process being declared a success.

## INTRODUCTION

The advent of South Africa's political independence democratised and brought new challenges to institutions of higher learning. Institutions became exposed to a new global economy characterised by labour and capital organised on a global scale, calling for role players who had access to, and were in possession of, the necessary knowledge and information. These characteristics of the new economy, combined with the new government's aims of 'redressing past inequalities, serving a new social order, meeting the pressing needs and responding to new realities and opportunities in the education sector,' resulted in the South African government initiating the transformation of the higher education landscape (Van der Westhuizen, 2004, p. 155). This transformation aimed at ensuring increased accessibility to, and equity in, the provision of higher education for all.

To this end, the Ministry of Education established an advisory body – the National Working Group on Education – which put forward recommendations on the transformation of the higher education sector (Department of Education, 2001), centred on the reduction of the country's 36 Universities and Technikons to 23. The primary instruments in the facilitation of this reduction were mergers and incorporations of previously separate institutions into bigger institutions under one management. Section 23 of the *Higher Education Act 101 of 1997* defines a merger as 'the combination of two or more separate institutions into a single entity with a single governing body, whereby all the assets, liabilities, and responsibilities of the former institution are transferred to the single new institution'. Section 24 states that 'incorporation of a subdivision refers to the situation when an identified subdivision, faculty, school, department, section or component of a public higher education institution becomes part of another public higher education institution while the latter institution's legal personality... is not affected.' Merger and incorporation plans are contained in the National Plan for Higher Education Policy (Council for Higher Education, 2001).

To facilitate a smooth transition, the implementation of the policy and the creation of new institutions to achieve 'fitness for purpose' – that is, the creation of conditions necessary to implement new visions and missions through mergers and incorporations – the Ministry of Education's (MoE) guidelines on mergers and incorporations noted the importance of ensuring there was no vacuum in leadership and management during the process. The primary concern was regarding management (leadership) and the development of appropriate, effective integrating mechanisms by which mergers and incorporations could be facilitated, resulting in the full absorption of an incorporated campus into a receiving one (MoE, 2003).

The proposed mergers and incorporations occurred against reports of:

- (1) increased leadership instability – that is, movement of high profile people in and out of senior administrative positions from the country's higher education institutions (Wolf, 2000)
- (2) divergent views on the roles of leaders in mergers and incorporations of higher education institutions (April & Hill, 2000)
- (3) a number of the institutions proposed to merge or incorporate have not yet developed and operationalised minimum systems (e.g. human resources) to enable effective implementation of the policy (Bendix, 2000)
- (4) a disturbingly poor quality and credibility of higher education academic leadership at most Historically Disadvantaged Institutions (HDIs) before and after independence which, it was feared, could have resulted in poor and improper mergers or incorporations. This poor type of leadership has yet to find ways of acting credibly in developing strong and diverse academic and intellectual communities of scholars. Such inaction exposed these institutions to the political claim that transformation in the higher education sector was being stalled' (Jansen, 2003, 2004)
- (5) the future existence of universities in South Africa was being undermined by growing corporatisation, rampant managerialism and state control. Consequently, most of the universities earmarked for mergers or incorporations had been transformed into commercial centres, where every management meeting was focused on balancing the budget and where the response to external intervention was being met with compliance and consent; teaching methodology was equated with technology and mechanisms of research confused with the elegance of scholarship.' (Jansen, 2004).

In addition, the national merger and incorporation policy document did not specifically mention the type of leadership that should drive the process and only gave a generic outline of the importance of good governance from institutional leaders.

Despite these concerns, the merging or incorporation of the affected institutions proceeded. One of the requirements was for new institutional leaders to successfully manage the transformation process, not because of their political expediency or racial preference, but because of leadership qualities which gave them credibility. The emerging picture was one that challenged management in the merging or incorporating institutions to ensure that leadership issues were fundamentally addressed. Successful mergers and incorporations have highlighted the fact that there is a common denominator that determines success: the way in which leaders manage the process (Pritchard, 1993). Thus, although good preparation, communication and support, etcetera, are vital elements for a merger or incorporation, their existence will not contribute to successful implementation, but rather how leaders utilise and manage them. In this regard, it is imperative to assess the issue of leadership among the transformed institutions. This results not only in the future successful implementation of higher education changes, but also the building of leadership commitment for and alignment to the proposed changes in the sector and the development of institutional leadership teams to take responsibility for any other transformation process.

### The concept of transformational leadership

The concept of transformational leadership was developed by Burns (1978), who regard it as an extension of transactional leadership. Transactional leaders exchange and promise rewards for followers' efforts and respond to subordinates' immediate interest (Balster, 2002). On the other hand, transformational leadership involves charisma, inspiration, intellectual stimulation and individual consideration (Bass, 1990). By using charisma, the leader shares the vision and mission of the organisation, instills pride in subordinates and

gains respect and trust. A transformational leader communicates high expectations, uses symbols to focus efforts and expresses important purposes in simple ways. Intellectual stimulation is used by transformational leaders to promote intelligence, rationality and careful problem solving (Avolio, Waldman & Yammarino, 1991). The transformational leader gives personal attention, treats each employee individually and coaches and advises, thus giving individualised consideration to employees. Considering these characteristics of transformational leadership and the work of Morakul and Wu (2001), Lim (1997), Jansen (2000) and Drew and Smith (1995), it is possible to identify the following transformational roles of a leader:

- (1) Development of a shared vision (Lim, 1997).
- (2) Clarification of strategic direction (Lim, 1997): these two entail that the leader defines the vision of the organisation and its value to the followers, ensuring that followers are aware of the content and meaning of the direction that the organisation is following. The leader also ensures that the link between the vision and the type of organisational principles is well established.
- (3) Empowering (Morakul & Wu, 2001): a leader who empowers provides followers with the authority to make decisions, rewards them when they become innovative and take risks, involves followers in important change initiatives, allows followers to have access to relevant information pertaining to the change taking place and rewards followers for supporting positive change.
- (4) Development of capacity for change (Jansen, 2000): this involves leaders making an assessment of the readiness of followers to participate in the transformation process, ensuring that followers have the necessary skills and training to participate effectively in the change process and dealing with the emotional aspects of followers. These four tasks indicate that the role of a leader in the change process is essentially transformational.

Indeed, the overall focus of transformational leadership is therefore to produce levels of effort and performance in followers that go beyond what would be achieved with transactional leader (Robbins, 2001).

### Mergers and transformational leadership

Evidence has shown that there are no difference in transformational leadership, whether it is utilised within an educational or a business environment (Hoover, 1991), especially considering the present day trend of running educational institutions as businesses. (Hoover, 1991). This is true, considering the fact that today educational institutions are run along business practices. Studies on mergers and incorporations in educational settings have show that transformational leadership is an important factor in the success of the merger (Hope, 2002; Fernandez, 2005). In a study done in Poland, Mikulowski (2002) found reports that the threat posed by a lack of leadership competencies on the proposed incorporation of educational institutions was ameliorated when institutional leadership received training on leading the transformation process. Similarly, in Australia mergers have been found to be successful in the presence of strong and visionary leadership (Reddy, 2001). In China, where the education system was traditionally characterised by centralised planning, merger and incorporations were performed in an effort to change the obsolete system under which universities were owned and run. This objective was achieved through the appointment of leaders considered to be charismatic.

The examples cited above indicate that in the context of mergers, using the principles of transformational leadership provides an opportunity for leaders to gain the commitment of relevant stakeholders through shared values and vision. Leaders who play transformational leadership roles in the merger will be able to promote risk-taking behaviours among followers and mobilise resources towards followers in an effort

to produce the desired level of effort for success. The use of these principles also helps in the development and maintenance of a collaborative and professional organisational culture. Indeed, literature (Keup, Walker, Astin & Lindholm, 2001) argues that mergers bring together different cultures, procedures, systems and policies and therefore there is a need for the creation of a common distinctive culture. However, given that culture develops on the basis of shared vision and mission, strategy, policies, systems and procedures, it can be argued that, though the creation of a common culture or identity after a merger takes time, it is best done by leaders who play transformational leadership roles. Hall, Symes and Leucher (2004) support this view, when they argue that institutions whose governance of the process of mergers or incorporations has been democratic and based on transformational leadership style will establish a very different culture as opposed to those whose governance has been management focused.

Literature points out that the institutional leaders who championed the process of mergers or incorporations in South Africa did not have minimal or previous experience (McKnight, 2002) because these were rare occurrences within the framework of higher education organisation and management. Therefore, institutional leaders largely relied on research literature for guidance and advice. Prior to mergers of higher education institutions in South Africa, research (Manser, 1999; Msila, 2000; Lokotsch, 2002; Singh & Manser, 2002) revealed that there was a major flaw regarding the way transformational leadership principles were contemplated and implemented. This was evident, especially in the case of some HDIs, where a shared vision was interpreted as a once-off event, rather than an ongoing part of the evolutionary process of transformation (Manser, 1999; Msila, 2000). Mistakenly, a change in leadership strategy was regarded simply as a final product rather than a continuous process. Previous research has indicated that, for the mergers to be successful, transformational leadership had to be carefully nurtured by the institutional leaders who had been mandated to lead the transformation. Indeed, Fernandez (2005) found that transformational leadership can be effectively utilised to extract the best from people and create the most effective and efficient educational climate at institutional level.

Besides the identified flaws and shortcomings in the use and conceptualisation of transformational leadership among some South African higher education institutions, reports on transformational leadership issues on various forms of amalgamations globally have been limited to developed countries (John, 1999; Adams-Matuszynska, 2001; Reddy, 2001). These examples do not offer much in the way of providing usable generalisations to serve as guidelines to nations in transition, such as South Africa. Furthermore, empirical studies show that praxis and theory concerning mergers and incorporations in different countries and institutions do not always converge and experiences with mergers and/or incorporations among institutional leadership vary (Skodvin, 1999:76). Because transformational leadership among nations in transition (especially developing countries) that have embarked on higher education transformation have not yet received sufficient analytical attention, there is need to analyse the issue at institutional level. This would provide critical leadership information for comparing and contrasting such leadership styles across different contexts. Additional information on whether transformational leadership principles were applicable under the prevailing conditions of policy, laws and state-sector relations in South Africa could also be obtained.

The tertiary institution selected for this study incorporated (legally, though not substantially different from a merger) another institution. The incorporation strategy was highlighted in the Institutional Operation Plan (2003), approved by the Department of Education (DoE), and resulted in the streamlining of some operations and the reformulation of structures as initial major changes towards the incorporation. This was in line with

the requirements of the ministry's guidelines on mergers and incorporations which state the following:

*It is vital to the success of mergers and incorporations that there is accountable and effective governance and management all the time. The challenge is to ensure good governance and management even while the governance and management structures themselves are subject to change. Institutions must be run effectively throughout the process, and at no stage should there be vacuum in governance and management. The responsibility for driving the project however rests with the institutional leadership, who must ensure that the process is not brought to a halt over issues where there are high contestations... the institutional leadership together with the merger manager should be responsible for driving the process, maintaining a broad perspective on objectives and desired outcomes, establishing necessary links, identifying overlaps, and ensuring proper sequencing of actions.*

(MoE, 2003, 4–11)

Issues of governance and management as well as maintaining broad perspective on objectives in the above statement are aspects of transactional and transformational leadership, respectively. This means that the implementation of the transformation process for the planned mergers and incorporations rested on good and appropriate leadership styles. Previous literature points out that during the period of higher education transformation in South Africa, academic leadership in the formerly disadvantaged institutions was poor and that the new guidelines on mergers lacked guidance with regard to the leadership style suitable during mergers and incorporations. In spite of the fact that utilisation of transformational leadership has been found essential to the success of mergers and incorporations, the extent to which leaders in the merging institutions in South Africa have incorporated it, has not been clearly established. An investigation into its use in the mergers that took place in South Africa could be a starting point in developing a good management approach for future mergers in the higher education sector. This study therefore, aimed to determine the perceptions and opinions of the target population by answering the following questions:

- How does the institution's executive management understand the term 'transformational leadership'?
- What transformational leadership roles did the institution's executive management play during the merger process?
- To what extent do employees feel the institution's executive management used transformational leadership during the merger process?

## RESEARCH DESIGN

A mixed-method research design (Babbie & Mouton, 2001) using both qualitative and quantitative methods was used in the study. The mixed-method design was employed to raise the data above possible biases stemming from use of single methodology (Babbie & Mouton, 2001). This is known as triangulation of information. Newman (1997) defines triangulation as an attempt to gather observations using various sampling strategies to ensure that a theory is tested in more than one way. In the present research, triangulation data was done by verifying and validating information from the interviews using information from the questionnaires. Participants in the study therefore, consisted of two separate samples, one comprising the institution's executive management and the other one other employees.

### Qualitative research approach

In order to answer questions 1 and 2 posed by the study, a qualitative research approach was followed: interviews were used to obtain information as to how the concept of 'transformational leadership' was interpreted by the executive management and how they perceived their roles in the incorporation process. As previously indicated, transformational leadership entails sharing vision and strategic

direction, creating an empowerment climate and capacity for change. A qualitative design was appropriate for this part of the research, because it is used when a researcher wants to study a phenomenon in its natural setting and interpret it in terms of the meanings attached in that situation (Swanson & Holton, 1997). In this research, a qualitative approach was deemed appropriate because of the nature of the issue under investigation, which required detailed information about the meanings that people attached to the matters under consideration, given the emotive nature of change.

### Research strategy

A case study strategy using structured interviews as a data collection method was used to gain an in-depth understanding of the transformational leadership roles used by the target sample in the incorporation process.

### Research method

#### Research setting

Interviews were conducted within the institution's environment, specifically in the office of each of the respondents in the executive management sample.

#### Entrée and establishing research roles

Prior to each of the interviews, the researcher telephonically called each of the respondents in the target sample and explained the purpose of the research. Thereafter, appointments for interviews were secured.

#### Target population

The institution from which the two samples were drawn employed 210 academics and 140 non-academics. The qualitative part of the research focused at the executive level of the institution. They were the group responsible for driving the merger process.

#### Sampling

Six purposefully selected institutional leaders of the institution's executive management team who had driven the merger constituted the sample. These included the Special Assistant to the Vice Chancellor, Human Resources Director, Director of Communications, the academic Deans of Research, Law and Science and Agriculture. There was one woman (Black) and five males in the sample. Three of the male participants were White and two Black. Among the Black males, one was a non-South African.

#### Data collection methods

The 'phenomenological interview' (Kvale, 1996) was used as the interview method. Using a 16-item structured interview guide, the interviewer asked a core question to solicit institutional leaders' understanding of transformational leadership. The question asked was: 'As one of the institutional leaders responsible for the incorporation process, what is your understanding of the term transformational leadership?' To establish the transformational leadership roles the leaders had played during the merger, questions 2–15 derived from the categories of transformational leadership tasks as defined by different authors were used. Examples of questions from each category were:

- **Idealised influence** (shared vision, [Lim, 1997])  
'What were the values guiding the merger process?'  
'Did the general employees know the new vision and mission and their content? Why?'
- **Inspirational motivation** (provision of strategic direction, [Lim, 1997])  
'Please explain your understanding of the knowledge of

employees in terms of knowing benefits and key priorities set by the institution during the merger process.'

- **Intellectual stimulation** (empowerment climate, [Morakul & Wu, 2001])  
'What plans were put in place to ensure that employees had the necessary skills and knowledge to participate in, and cope with the merger process?'
- **Individual consideration** (capacity for change, [Jansen, 2000; Drew & Smith, 1995]) 'What is your opinion on the extent to which the personal needs of employees were catered for during the merger process?'

#### Reliability of the interview data

Several strategies that ensured reliability of data were employed. Guba's (Babbie & Mouton, 2001) method was applied to achieve credibility, transferability, dependability and conformability. Thus, reliability was achieved by triangulation, debriefing and purposive sampling.

#### Recording of data

Each interview was audio-taped and transcribed verbatim.

#### Data analysis

Aligned to the method suggested by Tesch (Cresswell, 2003), analysis of the qualitative data was conducted through transcribing each interview and a content analysis was used to determine the underlying themes for each question. Content analysis is unobtrusive compared to other research methods. The content analyst seldom has any effect on the subject being studied. However, it is only limited to the examination of recorded communications and therefore problems of validity are likely to be experienced.

#### Reporting

For each interview question, an aggregation of similar individual responses was done in order to establish the emerging theme(s).

#### Quantitative research approach

In order to answer question 3 of the study, a quantitative research approach using questionnaires was used to solicit data to understand employees' perception of the extent to which the institution's executive management played transformational roles during the incorporation. Quantitative designs, on the other hand, deal with a large number of respondents, use numbers to generalisable comparisons and conclusions about populations (Ghauri & Gronhaug, 2005). It was for this reason that a qualitative approach was chosen: a large number of employees were involved, making the interviews a time-consuming process, and in addition it provided a platform for the comparison of data.

### Research method

#### Research participants

The second sample consisted of 153 employees (80 academic and 73 non-academic staff) representing 38% and 52% of the total population for each category, respectively. They were randomly selected from all three campuses of the institution. Seventy-nine were females and 74 were males. The increase in the number of academic and non-academic staff was based on the assumption that they were the population largely affected by the behaviour of leaders driving the merger process. One hundred and five of the respondents had work-experience of between 1–10 years, 30 of which had experience of 11–20 years and 10 of less than a year. Only eight had worked 20 years at the institution.

**Measuring instruments**

A questionnaire was used to collect data. The philosophical thinking of positivism (Newman, 2000) which argues that information can be quantified and that interpretations made justified the use of a questionnaire to collect data from the sample of academics and non-academics. As all participants were literate, they were capable of completing the questionnaires unassisted. Items in the questionnaire were the same as those in the interview schedule, based on the four transformational tasks, that is, shared vision (Lim, 1997), clarity of strategic direction (Lim, 1997), empowerment (Morakul & Wu, 2001) and capacity for change (Jansen, 2000). However, the phrasing was such that they solicited employees’ perceptions regarding executive management’s use of transformational leadership roles during the merger. The items were measured on a 4-point Likert scale ranging from (4) ‘strongly agree’ to (1) ‘strongly disagree’ in order to avoid situations where participants indicate that they do not know or are uncertain about a particular issue. Using Cronbach-alpha coefficients, the internal consistency reliabilities for each section of the questionnaire were as follows: shared vision (0.71), strategic direction (0.74), empowerment climate (0.73) and capacity for change (0.73). A Cronbach-alpha level of 0.5 and above is regarded as acceptable.

**Research procedure**

The questionnaire was distributed to all the academic and non-academic staff from the three campuses of the institution via e-mail.

**Statistical analysis**

Using a confidence level of 95%, a non-parametric statistic, the chi-square for goodness of fit (equal opportunities) was used to determine academic and non-academic employees’ responses regarding executive management’s use of transformational leadership during the merger. Choosing chi-square was based on the assumption that it deals with nominal data as in the current study consisting of frequencies in most cases. The idea was to establish whether the participants’ responses for each question were equally distributed across the values of the variables tested and then compare these with the interview responses from the executive management.

**ETHICAL CONSIDERATIONS**

Permission was sought and granted by the institution’s authority. Voluntary informed consent was sought from the interviewed participants through a telephonic conversation in which the researcher explained the purpose of the study. After each interview, time was allocated for the participants’ debriefing to avoid any harmful effects of their participation in the study. In addition, confidentiality was maintained at all times and participants were informed of the rationale, recording and safekeeping of interviews and transcriptions. For the questionnaires, respondents were informed through a letter sent via email from the HR office which communicated essential information about the research. Confidentiality of information was also guaranteed.

**RESULTS**

The first section presents results from qualitative data analysis.

**TABLE 1**  
Knowledge of transformational leadership

| Question 1: “As one of the institutional leaders responsible for the incorporation process, what is your understanding of the term transformational leadership?” |                                 |
|--|---------------------------------|
| Main themes  | Transformational principle/role |
| Shared vision  | Idealised influence             |
| Mobilisation of resources  | Inspirational motivation        |
| Team work  | Empowerment                     |
| Skills development   | Capacity for change             |

**Question 1**

The study first question in the interview guide sought to establish an understanding of transformational leadership among the six executive members of the institution. Key two main themes, as indicated in Table 1, emerged from asking the first question in the interview schedule: the creation of vision and mobilisation of resources.

Three respondents indicated that a transformational leader sets the institution’s vision. One noted that ‘...a transformational leader is a person who is not only concerned with the day-to-day running challenges, but a person who seems to see a bigger picture, one who is able to judge the horizon.’ Another viewed a transformational leader as ‘a person with good intellectual acumen ... one with the ability to formulate a vision based on the historical strength of the University.’

Four of the six institution’s executive management members indicated that the mobilisation of resources was an important aspect of transformational leadership and should be done in line with understanding the landscape of transformation. One participant stated that ‘transformational leadership involves a person who is able to mobilise resources and study the landscape for the performance of the future.’ Conceptualising the same theme, another respondent exemplified the method of using external consultancy to achieve transformation goals. ‘As a transformational leader, you will have to engage maybe sometimes external knowledge by means of consultancy where you feel that you do not have expertise.’

Four of the respondents indicated that transformational leaders focus on team work and staff development. One stated: ‘To achieve success as a transformational leader, it is important to work as a team to support each other in our skills acquisition.’

**Questions 2 and 3**

Question two of the study was meant to identify the transformational leadership roles played by the institution’s executive management during the merger process. Results from the interviews were analysed in terms of interview questions from each category of the transformational leadership roles as identified in literature. Conversely, question 3 of the study sought to determine the perceptions of employees regarding executive management’ use of transformational leadership during the merger. The results were analysed in terms of responses per item using chi-square for goodness of fit. Results of both analyses are presented below in order to facilitate comparison.

**Shared vision**

**Values and beliefs guiding the transformation:** Five (83%) of the six executive samples indicated their familiarity with the values and beliefs guiding the transformation process, stating that they made every effort in ensuring these were known by all stakeholders during incorporation. Some of the values that emerged included the identity of the institution as an African university, tolerance of diversity, accountability and quality of service. One respondent noted that ‘Fort Hare is guided by the values of being an African university and diversity of workforce and students in order to be reflective of the community that it is part of. It is guided by the values of delivering quality tuition and accountability and these are what we emphasised.’

**Awareness of the content and meaning of the new vision:** All six executive management members interviewed agreed they had ensured that staff was aware of the university’s vision and mission. ‘Yes they knew ... it was our job as management to take the vision and mission from the university to our faculties and departments.’ ‘The vision and mission, people know them, they may not be able to repeat word by word.’

**Knowledge of the valued and inspiring aspects of the vision:** The African heritage, history, diversity and international

**TABLE 2**  
Chi-square result for shared vision role

| Item                               | Frequency | Response category | %  | DF | X <sup>2</sup> | p      |
|------------------------------------|-----------|-------------------|----|----|----------------|--------|
| 2. Values & Beliefs                | 88        | Agree             | 58 | 3  | 19.21          | 0.0002 |
| 3. Content & meaning of vision     | 112       | Agree             | 73 | 3  | 47.44          | 0.0001 |
| 4. Value and inspiration of vision | 107       | Agree             | 70 | 3  | 48.18          | 0.0001 |

**TABLE 3**  
Chi-square results for strategic direction role

| Item                | Frequency | Response category | %  | DF | X <sup>2</sup> | p      |
|---------------------|-----------|-------------------|----|----|----------------|--------|
| 2. Values & Beliefs | 88        | Agree             | 58 | 3  | 19.21          | 0.0002 |

focus of the vision were cited by all six executive management members as aspects valued by staff: 'The fact that Fort Hare identified itself with its African identity and not Eurocentric is valued.' and 'the valued and inspiring aspects of the vision are the diverse programmes that make our students marketable.'

In terms of shared vision, as indicated in Table 2, 58% of the employees showed awareness of values and beliefs guiding the major process as indicated in the ( $X^2 = 19.21, p < 0.0001$ ). Seventy-three per cent agreed they were aware of the content and meaning of the new vision and mission ( $X^2 = 47.44, p < 0.001$ ) while 70% of employees confirmed that the diversity aspect of the vision and mission inspired them ( $X^2 = 48.18, p < 0.0001$ ).

### Clarity of strategic direction

**Understanding the benefits of transformation:** Five (83%) out of six of the executive management stated that though they explained, staff did not know the benefits of the incorporation:

*'We explained the benefits. They did not see the benefits of restructuring for the reason that once you talked of it ... everybody thought of retrenchment. I will lose my job or will my union members lose their job. To them, it was bringing in insecurity ...'*

As indicated in Table 3, 52% of the employees indicated they did not know the benefits of the merger ( $X^2 = 41.27, p < 0.0001$ ).

### Empowering climate

**Access to information on progress of incorporation:** Fifty per cent of the executive management agreed that staff were informed regularly of the progress of the incorporation:

*'It was not 100 percent [sic - per cent] although we tried and disseminated the information as much as possible through the consultation process. The problem was that a lot has been expected from us in a short space of time. We slipped at times, because we had to rush to meet the time frames and the demands of the processes themselves.'*

**Provision of opportunities to be innovative and take risks:** The role of creating opportunities for staff to be innovative and promoting risk-taking among them was stated by five (83%) of the executive management sample.

*'We had great opportunity and equality for being innovative and take risk although we were constrained, but people did their work with a lot of energy. We gave people the opportunity to take calculated risks to mobilize resources that were at their disposal so that they could achieve the stated goals of transformation.'*

**Giving opportunity to make and influence decisions:** Four (67%) out of the six executive management sample agreed that opportunities were available for staff to make decisions

pertaining to the incorporation.

*'Yes, staff had all the opportunities to make every strategic decision and they were being recognised for that. The creation of positions for Directorships was meant to provide the freedom for them to make decisions and also work within their units.'*

**Provision of an enabling environment:** Sixty-seven per cent of the executive management stated that they provided an enabling environment for staff to do their best during the incorporation process:

*'I think in general we can feel that the environment and the broad Fort Hare were put in place for everyone to do their best. We however might have been limited by funding in some of our activities.'*

Sixty-three per cent of the employees indicated they had no access to information pertaining to the process ( $X^2 = 23.24, p < 0.0001$ ). Seventy-one per cent of the employees showed that innovativeness and risk-taking were not recognised and encouraged during the merger period ( $X^2 = 51.84, p < 0.0001$ ) and 67% indicated that they lacked the opportunity to influence decisions during the merger process ( $X^2 = 26.95, p < 0.0001$ ). Only 58% agreed they had the opportunity to excel and do their best ( $X^2 = 38.50, p < 0.0001$ ).

### Capacity for change

**Opportunity to work in teams:** Five (83%) of the six executive management highlighted that they played the role of creating teams to help in the incorporation:

*'The whole operation of the university was such that there were small teams of common purpose. We had committees and task teams whose aims were to create team spirit and working together for a common purpose.'*

**Preparation of staff for the transformation:** Four (67%) out of six executive management sample indicated they had no time to prepare staff for the commencement of the incorporation:

*'I do not think the university had time to prepare its staff, or could have prepared its staff because the staff at the incorporated institution was new. In addition, nobody clearly knew what this 'animal' called merger and incorporations was. So, I certainly do not think the university could have prepared them adequately.'*

**Knowledge of priorities and solutions for successful transformation:** Fifty per cent of executive management reported that they had played their role in ensuring that staff knew the university's priorities in ensuring success of the incorporation. *'I do not think anyone at this institution can*

**TABLE 4**  
Chi-square results for empowering role

| Item  | Frequency | Response category | %  | DF | X <sup>2</sup> | p      |
|---|-----------|-------------------|----|----|----------------|--------|
| 6. Access to information                      | 97        | Disagree          | 63 | 3  | 23.24          | 0.0001 |
| 7. Opportunity for innovation and risk-taking | 109       | Disagree          | 71 | 3  | 51.84          | 0.0001 |
| 8. Opportunity for decision-making            | 103       | Disagree          | 67 | 3  | 26.95          | 0.0001 |
| 9. Enabling environment                       | 90        | Agree             | 58 | 3  | 38.50          | 0.0001 |

TABLE 5  
Chi-square results for capacity development role

| Item                                     | Frequency | Response category | %  | DF | X <sup>2</sup> | p      |
|--|-----------|-------------------|----|----|----------------|--------|
| 2. Working in teams                      | 104       | Agree             | 67 | 3  | 23.92          | 0.0001 |
| 3. Staff preparation for merger          | 100       | Disagree          | 65 | 3  | 29.98          | 0.0001 |
| 4. Knowledge of solutions and priorities | 81        | Agree             | 53 | 3  | 33.80          | 0.0001 |
| 5. Dealing with emotional effects        | 100       | Disagree          | 65 | 3  | 29.98          | 0.0001 |
| 6. Development of skills                 | 84        | Disagree          | 55 | 3  | 17.48          | 0.0001 |
| 7. Caring for career and personal needs  | 106       | Disagree          | 69 | 3  | 30.92          | 0.0001 |
| 8. Overall satisfaction with merger      | 94        | Disagree          | 61 | 3  | 25.58          | 0.0001 |

claim ignorance of what the institutional priorities were, in terms of performance and going forward.'

**Institutional initiatives to deal with emotional effects:** Fifty per cent of the executive management reported that the university had initiated ways to address the emotional effects of the incorporation among staff:

*'Yes, they were there including the legal services. They were put in place and a number of colleagues were working towards that. Even if there was no transformation, we still needed to cater for the emotional reactions of staff every day.'*

**Development of skills and knowledge to operate in the new environment:** Five (83%) out of the six executive management stated that the institution needed to do more in train staff during the merger, citing evident discrepancies between the skills of staff at the two institutions that merged.

*'This is an area where the university did not pay much attention to. Look, people in East London were always complaining about the level of skills of people in Alice. These changes could have come along with re-skilling people to match the new challenges during the incorporation.'*

**Catering of career and personal needs:** Four (67%) out of the six executive sample expressed ignorance about plans to cater for personal needs and career plans, but indicated an awareness of certain units designated for that purpose and that the university was in the process of complying with certain national legislation regarding skills development. The following reports attest to these:

*'I think there was more that needed to be done ... there was a lot to be done at Departmental and Faculty levels...there was a huge challenge especially for the Human Resources Department of the University which seemed not very much active in these matters when it was supposed to be.' 'Not really, were in the process of revising, especially with the Department of Labour requiring us to engage in skills and comply with the act.'*

**Perceptions of overall satisfaction with the progress of the incorporation process:** Fifty per cent of the management sample agreed there was no satisfaction among staff regarding the progress and the way the incorporation had been done:

*'No, definitely not. It is not everyone who understood what was going on.' 'I think this is an area where we needed to do a lot ... the transformation brought changes to things like policies among the people ... which put them under bureaucratic pressure. There was no way in which we could have expected them to be satisfied at that stage.'*

In terms of creating capacity for change, 68% of the employees confirmed they had the opportunity to work in teams ( $X^2 = 23.92$ ,  $p < 0.0001$ ). A relatively high percentage (65% of the employees indicated that staff did not get enough preparation for the merger ( $X^2 = 29.98$ ,  $p < 0.0001$ ). Fifty-three per cent admitted that they were aware of the set of priorities and solutions during the process ( $X^2 = 33.80$ ,  $p < 0.0001$ ). Sixty-five per cent of the employees indicated that nothing had been done to ensure they were emotionally prepared before or after the merger ( $X^2 = 29.89$ ,  $p < 0.0001$ ). Fifty-five per cent of the employees indicated they were unaware of university plans and actions to provide skills and knowledge needed for successful incorporation ( $X^2$

$= 17.48$ ,  $p < 0.0001$ ) while 69% indicated that their career plans had not been catered for during the period of the merger ( $X^2 = 30.92$ ,  $p < 0.0001$ ).

Regarding the overall satisfaction with the merger process, 61% of the employees expressed unhappiness with how the merger process had been carried out ( $X^2 = 25.95$ ,  $p < 0.0001$ ).

## DISCUSSION

### Meaning of transformational leadership

From the responses of the executive management of the institution, it is evident that they understood the importance of creating a vision during the merger process. Indeed, the creation of an organisation's vision is one of the important tasks of a transformational leader, entailing the indication of a desirable future state of an organisation especially during transition phases. In relation to mergers and incorporations, the findings concur with the MoE's guidelines on mergers which recommended the creation of a sense of whole and provision of adequate organisational support by institutional leaders (MoE, 2003). The mobilisation of resources also emerged as a theme in explaining what transformational leadership entails. In any transformation process, the use of all relevant stakeholders is highlighted and can be rightly regarded as a means of resource mobilisation to achieve transformational goals. Thus, Harman and Meek (2002) indicate that good governance, in terms of creation of structures, processes and systems should be supported by great affinity on the part of institutional leadership to incorporate and inspire all the relevant stakeholders. These activities are linked to the transformational leadership principle of inspirational motivation. Similarly, in South Africa, the 2003 guidelines on mergers stated that relationships among different stakeholders had to be established in order for institutions to successfully merge or incorporate.

A transformational leader uses teams for capacity development. This notion is supported by Bowring and West-Burham (1994) who argue that to effectively manage change, shared leadership must prevail. The creation of teams during mergers and incorporations of higher education institutions in South Africa also meant giving followers the opportunity to share decision-making processes in their respective units. The concept of transformational leadership seems to have been well understood by the executive management of the institution under study.

### Shared vision

A comparison of interview results from interviews and employees' responses shows that the executive management of the institution had played the idealised influence role. Employees indicated that they had knowledge of the vision and its content during the merger management executive management and employees. These results support recommendations from the Ministry of Education that, 'A merger or incorporation should first identify the ethos and trajectory of the new institution,' (MoE, 2003:11). They also indicate adequate communication regarding the vision of the university among the staff during the merger. Literature on mergers support the importance of timely, clear, consistent, accurate and full communication to all stakeholders about the direction the organisation is taking

(MoE, 2003). Designing of strategic direction is regarded as the first step recommended in literature on mergers (Parker, 1998). Similarly, Avolio and Bass (1997) state that transformational leaders should spend time clarifying the vision and mission to create a context of achieving goals and objectives of the organisation. It is therefore prudent to consider that a core value system existed within the institution during the time of merger and it was shared.

### Strategic direction

Any transformation process contains benefits for different stakeholders (Gibbon, 2005). The results of this study indicate that employees did not understand the benefits of the transformation that took place. This was confirmed by the executive management who insisted that the benefits were explained, but were misinterpreted as retrenchment by the employees.

From these results, the inference is that although institutional leadership might have played their transformational role of inspirational motivation, the emphasis was only on institutional and not national benefits, such as increased access, equity and diversity as stipulated in government policy guidelines on mergers. In any change process it is critical that stakeholders, such as employees, position themselves effectively within transformation, and receive information about the change – its rationale, progress and implications. This helps provide focus, commitment, motivation and a sense of belonging among those participating in the process. In the current study, it was the leadership's responsibility to inform the staff about both the national and institutional benefits and this objective seems not to have been achieved.

### Empowering climate

The executive management accepted that they played the role of information dissemination. However, this was in contradiction to the responses of employees who indicated that they did not have access to adequate information pertaining to the merger. According to the MoE (2003) guidelines, the communication function is best located within the leadership structures of the institution so that communicating the progress of the transformation becomes the prerogative of the organisation's leadership. Provision of information is one way of playing the empowering role of a transformational leader. Followers with adequate information about any change process are likely to be more committed to the process than those without (Avolio, 1995). Slabbert, Theron and Roodt (2000) point out that responsive and responsible information regarding the process and progress of transformation is vital in ameliorating anxiety and uncertainty among staff. These findings indicate that information regarding the incorporation was not totally accessible amongst the general staff members of the institution.

Employees of the institution showed that they were not recognised for being innovative and taking risks yet the executive management insisted they did. The results do not concur with Avolio (1995:12) who argues that a good transformational leader should use the principle of intellectual stimulation; encouraging followers to think differently about situations, promoting creativeness and constantly asking them to query assumptions and redefine problems. There were also contradictions between employees' perception and management assertions regarding decision-making opportunities during the merger. Johnson (1995) asserts that an empowering climate is one in which leaders in terms of playing an empowerment role during the merger process, the institutional leadership seem not to have played that role adequately.

### Capacity for change

In terms of capacity for change, both employees and executive management agreed that opportunities were provided for employees to work in teams. This confirms assertions by Morakul and Wu (2001) who argue that the cultures of togetherness, subordinate empowerment and shared decision-making are important during the period of transformation. Results also confirmed findings by Kouzes and Posner (1997:16) that work teams are a way of empowering followers and democratising the workplace. Employees also acknowledged that they were aware of the priorities and solutions needed for the merger to succeed and this was also confirmed by the executive management. These priorities and solutions are regarded as part of interventions that are needed during the time of change. According to Drew and Smith (1995) they enable followers to develop the required skills and knowledge required to operate in the new environment.

The executive management acknowledged that there was no time to prepare employees for the merger. This was confirmed by the employees as well. Management felt the process was just imposed on employees. This is in line with Stumpf's (2005) argument that when the transformation of higher education was announced, institutions were left to grapple with the processes and to define their own trajectory. The results also support the notion that the designing of strategic direction is the first step recommended in literature on mergers (Parker, 1998). Institutions were muddled and there was disturbingly poor quality of institutional leadership to manage the mergers especially among the HDIs (Jansen, 2003). If the institutional leadership was not prepared to drive the process, there was no way in which the people they were leading would be prepared to participate positively.

There were also agreements between the leaders and employees regarding lack of plans to develop skills among followers, as well as taking care of individual and career needs during the merger process. Organisations that provide career programmes, helping employees identify and shape their career path and showing them the opportunities available during any change process have had a low labour turnover (Shultz & Schultz, 1994). A transformational leader should stimulate and provide opportunities for employees' personal growth and development. The leader pays special attention to individual needs, achievements and the growth of followers by providing challenges that suit individuals (Hoover, 1991). The results are, however, not surprising, considering arguments that in South Africa, mergers and incorporations have taken place amid reports of discrepancies in skills and a readiness to manage among the institutional leaders (Wyngaard & Kapp, 2004). Results contradict Hay and Fourie's (2002) recommendation that capacity development should be an integral part of the merger process and involve programmes designed to prepare staff for the new challenges and changes. Skills development among the different task teams in preparation for the incorporation could have helped to make the institution fit the 'new purpose' as espoused by the government.

The executive management of the institution indicated that they had initiated ways to deal with the emotional effects of the merger process on employees. This assertion was refuted by employees. One of the challenges which hinder the successful implementation of mergers and incorporations, according to Scott (1988), is the devastating impact they have on the emotional and professional lives of academic staff. Some evidence in literature argues that mergers and incorporations cause anxiety, stress and depression among the survivors (Van der Westhuizen, 2004; Verhage & Chipunza, 2005). If not addressed, work productivity, relations and morale are most likely negatively affected. During a change-process such as a merger, transformational leaders can deal with these emotional



aspects through individualised consideration, dealing with how each employee reacts to the process.

In terms of overall satisfaction with the manner in which the merger process was conducted, both employees and executive management indicated that they were not satisfied. Employee satisfaction has a number of facets, ranging from satisfaction with structures, procedure, conditions of work, fairness in decisions, leadership, to the degree of freedom an employee exercises. It was the responsibility of the institutional leadership to constantly assess the satisfaction levels of staff during and after the transformation. This could have resulted in the provision of appropriate incentives, resources and decisions to create spin-offs in securing employee commitment which was aligned to the new organisational goals. In line with Dimmock (1995), a lack of satisfaction among employees indicates that the institutional leadership did not identify all the threats and opportunities that could have enabled staff satisfaction with the overall institutional strategy regarding the incorporation.

In summary this study has shown that leaders in the institution played key roles such as shared vision, team work and the creation of an enabling environment. An important point that has emanated from this study is the evidence that during transformation, a lack of strategic direction and empowering of followers and capacitating them leads to dissatisfaction with the whole process, despite the transformation process being declared a success. What this entails is that there is need to build a leader's understanding of, and commitment to, mergers and an emphasis on transformational rather than transactional leadership well before a merger takes place. This could be done through collegial leadership (Singh, 2005), which is based on the assumption that transformation is best achieved when leaders devolute power to followers and other stakeholders, guided by the organisation's shared vision.

## Conclusion

The study is limited in terms of the generalisation of results, because a case-study method was followed. In addition, two years had passed since the merger when the interviews were conducted, therefore the memory of what really took place could have been compromised. The study, however, provides a useful departure-point and highlights areas that could be researched further, for example, embarking on a more comprehensive study involving other institutions that also merged.

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