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Value congruence and occupational stress during major organizational change

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VALUE CONGRUENCE AND OCCUPATIONAL STRESS DURING MAJOR
ORGANIZATIONAL CHANGE

A Thesis

Presented to

The Faculty of the Department of Psychology
San Jose State University

In Partial Fulfillment

of the Requirements for the Degree

Master of Science

by

Mark D. Zajack

August 2005

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ABSTRACT

VALUE CONGRUENCE AND OCCUPATIONAL STRESS DURING MAJOR ORGANIZATIONAL CHANGE

by Mark D. Zajack

This study examines changes in value congruence, stressors, and strains at two points in time during a corporate takeover. In addition, value congruence was examined in relation to both stressors and strains. Employees of the acquired organization completed a survey on their perceptions of the presence of role stressors (role ambiguity, role conflict, and role overload), strains (job anxiety, well-being, organizational commitment, and intention to quit), and both personal and organizational work values. It was expected that stressors and strains would increase, but value congruence would decrease from Time 1 to Time 2 and that the correlations between value congruence and both stressors and strains would be greater in Time 2 than Time 1. Results partially support the hypotheses and are discussed in terms of implications for future organizational acquisitions and instances of major organizational change.

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INTRODUCTION

Occupational stress associated with the announcement of an impending corporate takeover or merger is an important, albeit, challenging topic to study. One challenge is gaining access to organizations prior to, and subsequent to takeover. Once the takeover is announced there is uncertainty about job roles, job security, organizational goals, and more—at least until the organizational restructuring plans are announced. Few studies (e.g., Jimmieson, Terry, & Callan, 2004; Terry & Callan, 1998) have managed to capture data on aspects of stress and employees' perceptions of organizational values during this transition period.

This study is unique, therefore, as occupational stress data, as well as data on employees' perceptions of organizations' values (which represent guiding principles endorsed by the organization) were collected two times. The first time was when the takeover was first accepted and announced to the public (i.e., Time 1). The second time was one month after the initial merged organizational structure and initial employee layoffs were announced (Time 2). Data on job-related role stressors (overload, conflict, and ambiguity), organizational and individual strains (e.g., organizational commitment, intention to leave, well-being, and job anxiety), and personal and perceived organizational work values were collected from employees of the acquired company. Value congruence (or fit) was then determined between personal work values and employees' perceptions of the organization's espoused work values. This *value congruence* was tested in relation to both stressors and strains.

Theoretical Foundation

The Person-Environment (P-E) Fit model of occupational stress depicts stress-related problems as a result of a misfit between attributes of an individual and attributes of his or her environment. This is often reported in terms of value fit or congruence (Meglino & Ravlin, 1998). When an environment of rapid and sometimes unpredictable organizational change is coupled with individuals who do not necessarily embrace the change, a perception of misfit may arise, the result of which is an employee perception of “stress.” It is important to assess perceptions of person-environment fit or lack of fit, such as value discrepancy, in relation to employees’ perceptions of occupational stress (Jimmieson et al., 2004) in order to know what aspects of organizational life might need HR management interventions.

Organizational Change as Antecedent to Changes in Values, Stressors, and Strains

Major organizational changes, such as a corporate merger or acquisition, redefine the work environment for employees (Ahuja & Katila, 2001). These changes might cause a degree of misfit between the relatively stable personal work values (of the employee) and those of the changing work environment (Bordia, Hobman, Gallois, & Callan, 2004). However, very little is known about how employees’ values and perceptions of their organizations’ values change during this type of transition period, let alone the relation of the value perceptions to changes in perceived stressors and strains.

Purpose of this Study

The main purpose of this study is to investigate the extent to which the *incongruence* of personal work values and perceived organizational work values

correlates with role stressors and strains in the context of organizational change. Data were collected within two weeks of the announcement of a planned organizational merger due to a major corporate take-over. Approximately one month later, two weeks after the initial restructuring announcement of the merged organizations, data on the same variables were collected a second time. The announcement of a merger and associated layoffs had the potential to create a new environment for employees.

In order to better understand these relationships, a three-step process will be undertaken. First, individual employees' reports of stressors (i.e., role overload, role ambiguity, and role conflict) and strains (affective, continuance, and normative commitment, anxiety, well-being, and intention to leave) will be compared across Time 1 and Time 2. Second, personal and perceived organizational work values will be compared across Time 1 and Time 2. Personal work values are expected to remain stable across time. Based on work value theory, personal values should not shift drastically over the course of time (Meglino & Ravlin, 1998). However, perceived organizational work values probably would shift due to a change in organizational leadership, as organizational leadership drives an organization's values (Denison, 1996; Schein, 1990). Therefore, perceived organizational values will also be compared across Time 1 and Time 2. Third, changes in value discrepancy between personal values and perceived organizational values will be assessed. When comparing Time 1 to Time 2, value discrepancy will likely increase as employees are *less* likely to identify with a new organizational culture to the same extent as the previous one. Thus, if personal values are indeed stable, and perceived organizational value ratings decrease, value congruence

would likely decrease from Time 1 to Time 2. Therefore, the third purpose of the study is to assess if value discrepancy between personal work values and perceived organizational values correlates positively with stressors and strains differently during Time 1 than Time 2. Moreover, the correlation between value discrepancy and stressors and strains are expected to be significantly greater at Time 2 than Time 1. The presumption is that organizational change creates an enormous imbalance in one's relationship with the environment in terms of the level of fit between the values people hold as important and those exhibited by the changing organization.

LITERATURE REVIEW

The context in which occupational stress is studied can have a great impact on the outcome for an organization and its employees (Jex, Beehr, & Roberts, 1992). For many, the employment experience in the modern economy is one of nearly constant organizational change (Ferris et al., 1996). The trend toward globalization and multinational corporations has created a climate that fosters growth of the largest companies, often through mergers and corporate takeovers (Ailon-Souday & Kunda, 2003).

Mergers are often celebrated in the business pages, however few mergers result in more successful companies or increased value for stockholders of the acquired company (Morgenson, 2005). For example, the much-ballyhooed merger of AOL/Time-Warner resulted in a \$200 billion loss in market value and a \$54 billion hit to the merged companies' assets (Morgenson). Even accounting for the considerable financial perils of a merger or corporate buyout to stockholders, the greatest detrimental effects may be to the employees. "Perhaps the biggest downside to mergers is their human toll. Deals that combine companies are becoming a bigger factor behind large-scale layoffs across the nation" (Morgenson, p. 58). If the effects of mergers on employees were better documented, perhaps the lusty praise layered upon the announcement of new deals would be tempered.

Organizational Change

Major organizational change is understood as an act that has significant implications on both the organization and individual employees (Cascio & Aguinis,

2005). “Organizational change can be viewed as a critical life event that has the potential to evoke stress reactions and other negative consequences in employees” (Jimmieson et al., 2004, p. 11). Examples of these actions may be downsizing, restructuring, mergers, and acquisitions (Dackert, Jackson, Brenner, & Johansson, 2003). In many cases, these actions leave employees feeling that the organization is not living up to its obligations to them (Turnley & Feldman, 1999). Similarly, if the organizational change is perceived to be “illegitimate” (Brockner, 1988), as a hostile takeover is likely to be perceived, it is associated with increased reports of stress. The negative effects of these changes on employees have been associated with greater experiences of employee strain (Gakovic & Tetrick, 2003; Maslach, Schaufeli, & Leiter, 2001).

A hostile takeover, true to its aggressive nature, may ignore the needs of an organization’s employees, making employees more likely to perceive role-related stressors, and consequently more likely to result in strain(s), as employees begin to perceive a change in their work environment (Brotheridge, 2003). Employees of an organization on the receiving end of a takeover, often have little latitude within the decision-making process. Brotheridge found a negative relationship between organizational change and employees’ participation in decision-making. This is consistent with previous occupational stress findings, in which lower levels of participation in decision-making were associated with higher stress levels (Bond & Bunce, 2001; Brotheridge).

Organizational change alters key organizational variables, creating uncertainty for employees of that organization (Jimmieson, et al., 2004). Employees’ appraisals of

organizational change affect their reactions to the change in the environment (Ferris et al., 1996). Stress reactions, or strains, experienced by employees are consequences of potential uncertainty or changes in key organizational variables, such as work values, that affect employees individually and as a group (Jimmieson et al., 2004). Organizational change may be appraised as conflicting with the organization's culture values, which would negatively influence the work environment, and in turn employees' appraisals of stressors would more likely lead to strain (Beehr, 1998; Kahn & Byosiore, 1992). The effect of organizational changes, such as a corporate takeover is best understood through the changing relationships between employee and organization, or person and environment.

Changes in Organization Culture Due to Takeover

Understanding the underlying components of organizational culture, such as values, is essential to successfully navigate the potential pitfalls of rapidly changing business environments associated with organizational change (Seago, 1996). Denison (1996) contends that organizational culture can be "regarded as examining the internal social psychological environment of organizations and the relationship of that environment to individual meaning and organizational adaptation" (p. 625). A major change to the organization poses a threat to the equilibrium essential to culture's role as the arbitrator of the relationship between the environment and the individual.

Organizational culture defines the terms of the relationship between an employee and his or her environment by establishing a set of values which guide behavior within the organization (Denison).

An organization's cultural values or espoused work values are severely tested during a hostile takeover (Daly, Pouders, & Kabanoff, 2004). The sense of community, established by a fit between personal work values and the organization's culture values, is at risk during major change (Morrison & Robinson, 1997). Alignment of personal work values with the defined work values of the organization is at risk when variables external to the organization threaten to change those values.

Espoused values of an organization are believed to have a substantial influence on affective and behavioral responses of individuals in their work experience (Meglino & Ravlin, 1998). An organization's work values are defined as "modes of behavior" describing an organization's culture for employees (Schein, 1990). Similarly, Meglino and Ravlin define a person's work values as "an internalized belief about how [the employee] ought to behave at work" (p. 354).

Value Congruence

By considering an organization's espoused values within a measure of fit between the person and environment, one is able to assign a quantitative value to the measure while ensuring that the values used in items are qualitatively relevant to the organization (Denison, 1996; Mishra & Spreitzer, 1998). O'Reilly, Chatman, and Caldwell (1991) and Joiner (2001) successfully used quantitative measures of person-organization fit where respondents' ratings of personal and organizational variables were compared to provide a numerical measure of fit, rather than only qualitative reports of cultural values that are found in other studies of value congruence. The quantitative calculations of fit

are the result of subtracting ratings on the organization's values from the employee's personal values ratings (Verquer, Beehr, & Wagner, 2003).

Thus, value congruence is the level of fit between an individual's personal work values and an organization's work values. Value congruence can be assessed in a variety of manners. Verquer et al. (2003) describe three ways. First, value congruence can be assessed as subjective fit. In this way, employees are asked to give a single rating to describe how well their personal characteristics match those of the organization. Second, value congruence can be measured as objective fit. Employees are asked to describe their personal values and then different employees (usually an executive or HR manager) are asked to rate the organization on those same dimensions. Third, value congruence can be measured as perceived fit. Here, employees are asked to describe their personal work values and to also describe their perceptions regarding the organization's values on similar value dimensions. A final way to assess value congruence was described by Schwartz and Boehnke (2004). They first assessed individuals' personal work values, and then calculated averages for each value across all respondents. These mean values are indicative of the organization's values and individuals' responses to values are compared to the overall average within the sample.

In this study, the perceived fit methodology was employed. However, the list of values evaluated by respondents was unique in that the list was based on two sources. The first source was documented values of the acquired organization, that is, the espoused values of the organization, and the second source was generic values adopted from other researchers (Elizur & Sagie, 1999) that were deemed relevant to the

organization. Employees responded regarding their personal values, as well as their perceptions of the organization's values. The absolute value of the difference between value ratings served as the method to calculate value discrepancy.

Theoretical Foundation

Person—Environment Fit. The relationship between stressors and strains is described by the Person-Environment (P-E) Fit model (Cooper, Dewe, & O'Driscoll, 2001). The P-E fit model states that the interaction between the person and the environment determines the level of strain experienced. A greater perceived fit between the person and his or her environment results in less strain experienced by the individual. If needs (stressors) are out of equilibrium with the supplies of resources available to deal with the stressors then greater strain is experienced. P-E fit serves as a valuable conceptual model for understanding the stressor-strain relationship, however, few studies have been able to effectively define and measure the level of fit between the person and the environment (Cooper et al.). One exception is the use of value congruence as a measure of P-E or Person-Organization (P-O) fit. A meta-analysis by Verquer et al. (2003) found value congruence (based on employees' perceptions of their own and their organization's values) had a stronger relationship to outcomes, such as organizational commitment and intention to leave, than alternative measures of fit.

Past studies of value congruence, linking it to person-organization or person-environment fit found that lack of fit related to strains, such as low organizational commitment, high job anxiety, and high intention to leave (Meglino, Ravlin, & Adkins, 1989; Meglino & Ravlin, 1998). Value congruence is related to actions of the

organization by helping to clarify communications, remove ambiguity and conflict, and enhance work interactions – all of which are associated with reduced role stressors (i.e., role ambiguity, conflict and workload; Meglino & Ravlin, 1998). The perception of value congruence between individual and perceived organizational values indicates a positive relationship with affective outcomes, including organizational commitment, self-reported health, job choice intentions, and a negative relationship with intention to leave (Cable & Judge, 1996; Meglino et al., 1989).

Attraction-Selection-Attrition. Schneider's (1987) Attraction–Selection–Attrition (ASA) model provides a foundation to understand how the person and environment interact to result in employee strains, such as anxiety, ill-health, organizational commitment or intention to leave. The ASA model describes the full employment lifecycle within an organization, from an employee joining an organization to the point when the employee leaves the organization. Schneider defines the components of his model as follows. Attraction describes the process of an employee gaining interest in an organization or industry. Selection indicates that the organization and the individual assess that they share similar values and begin a relationship. Socialization describes the process in which the individual learns to gradually adhere to the cultural norms and values of the organization. Attrition occurs when a lack of fit between the person and the organization develops.

A key element in determining fit between an individual and his or her organization is the espoused work values associated with the organization's culture. Schneider's (1987) ASA model demonstrates the tenets of the P-E fit model in its

relationship with employee strain. According to the ASA model, when values between a person and the organization do not match, the likely result is employee attrition.

Researchers have used measures of value congruence to describe the fit between a person's values and values endorsed in the environment, providing evidence for the implications of the ASA model, that greater fit is associated with lower levels of strain, including attrition (Adkins, Ravlin, & Meglino, 1996; Meglino et al., 1989). Within the context of P-E fit, value discrepancy is an example of person-environment misfit, increasing the likelihood of a psychological strain, such as intention to leave.

In Schneider's (1987) model, strain is specified in behavioral terms, that is, employee turnover. However, prior to an employee's experience of turnover, the psychological strain of intention to leave is more likely to be present when value congruence is low (Cooper et al., 2001; Vancouver & Schmitt, 1991). Vancouver and Schmitt showed a relationship between higher levels of congruence and decreased intention to leave.

Generally, then, employees most likely to stay at an organization are those who suffer the least stressors and strains, have the greatest value congruence, or in general terms, where there is person-environment fit.

Occupational Stress

In general, the term "stress" is used to describe experiences in which people feel pressure or the presence of a stressor (Jex et al., 1992). Stress may describe the state of excitement or strain perpetuated by the stimulus (Jex et al.). When used generically, as it often is in casual conversation, it seems as if any situation or property could be described

as “stress-producing” or “stressful.” Because of the popularity and inconsistency of the term stress in the general public and the popular media, it is important to clearly define the term stress and its components to understand it scientifically. Stress is the relationship between stressors and strains (Jex et al.). The stressor-strain relationship is the foundation of occupational stress research.

Stressors

Stressors are the initiators of the stress response. A stressor is a condition or event that may potentially evoke a strain (Fox, Spector, & Miles, 2001). A stressor can be any stimulus that has the potential to elicit a reaction. There are a great variety of potential stressors, ranging from physical properties of the workplace, such as noise or light, to psychological phenomenon, such as role stressors (Kahn & Byosiére, 1992). The presence of a stressor requires an adaptive response by an individual (Fox et al.).

There are two primary types of stressors studied in the literature. These are physical stressors and psychosocial stressors (Kahn & Byosiére, 1992). Historically, investigations of occupational stress began by studying the physical stressors present in blue-collar work settings (Cooper et al., 2001). As more studies are conducted within corporate offices and white-collar settings, the primary focus of research has shifted from physical to psychosocial stressors. As job roles shift away from physically demanding tasks, the study of stressors moves away from the physical world toward assessing one’s role within the organization. This study focuses on the psychosocial stressors related to one’s role within a changing organization.

Role Stressors. Kahn, Wolfe, Quinn, Snoek, and Rosenthal (1964) first introduced the concept of one's role within the organization and the demands of that role serving as a stressor. Examples of role stressors are role ambiguity, role conflict, and role overload. Role ambiguity is the absence of sufficient information to understand one's expected job responsibilities, perform job tasks, and predict the consequences (Cooper et al., 2001). Role conflict is the presence of incompatible demands presented by one or multiple parties (Cooper et al., 2001). Role overload refers to the number of roles that a person has to fulfill.

Role ambiguity, conflict, and overload are closely related to job strain (Beehr, 1998). O'Driscoll and Beehr (1994) found a significant relationship between role stressors and reports of strain. Role stressors have been associated with low organizational commitment and job satisfaction (Pool, 2000). Role stressors, experienced as a result of organizational change, are linked to strains, such as intention to leave, job anxiety, ill-health, and employee well-being (Beehr, 1998; Brotheridge, 2003).

Shaw and Barrett-Power (1997) found that "role stress" is likely to increase during organizational change. Jimmieson et al. (2004) contends that this "role stress" is likely to manifest itself as role stressors, specifically, role conflict, role ambiguity, and role overload. In the context of organizational change, role conflict may arise from the priorities of the old and new organizations existing in opposition. The presence of role ambiguity may be due to a lack of clearly communicated expectation from the new organization. Role overload may appear when too many tasks are assigned during a period of integration (Jimmieson et al., 2004).

Strains

Strains, or the responses to stressors (Fox et al., 2001), fall into three categories: physiological, psychological, and behavioral (Kahn & Byosiére, 1992). Physiological strains include higher levels of cortisol and testosterone, cardiovascular complaints, and premature death from cardiovascular disease (Duffy & Chan, 2001; Laschinger, Finegan, Shamian, & Almost, 2001). Psychological strains include organizational commitment, intention to leave, and anxiety (Shaw & Barrett-Power, 1997). Behavioral strains include absenteeism and turnover (Duffy & Chan; Kahn & Byosiére).

Most research has focused on individuals' behavioral and psychological strains (Kets de Vries & Balazs, 1997; Shaw & Barrett-Power, 1997). Jex et al. (1992) explain the focus on psychological strains is not due to a lack of importance of studying physiological or behavioral strain, but due to the difficulty in isolating the effect of job-related stressors relative to stressors from outside the workplace, which may cause physiological or behavioral differences. The study of psychological stressors has often focused on job anxiety, well-being, organizational commitment, and intention to leave (Cooper et al., 2001). Studies measuring the relationship between stressors and strains typically show that higher levels of stressors are related to lower organizational commitment and well-being and greater job anxiety and intention to quit (Beehr & Glazer, 2005; Cooper et al.; O'Driscoll & Beehr, 1994).

Anxiety and Well-Being. Job anxiety and a lack of employee well-being are psychological strains resulting from stressors (Cooper et al., 2001). Role overload, role conflict, and role ambiguity have been positively correlated with high anxiety and lower

well-being in previous studies (Jex & Beehr, 1991; Kahn & Byosiene, 1992). According to Jex and Beehr, role stressors positively correlate with psychological strains, such as anxiety and lack of well-being, to a greater extent than with behavioral or with physical strains, such as high blood pressure. Job anxiety and well-being are also related to decreased general mental and physical health (Schwartz & Boehnke, 2004). Given the relationship of anxiety and well-being to occupational stress, as well its relevance as an indicator of general employee health, these variables are included in this study.

Organizational Commitment. Lack of organizational commitment is a strain measuring employees' perceptions of their loyalty, involvement in, and interest in an organization in relation to broad organizational variables (e.g., cultural values) of the environment (Mishra & Spreitzer, 1998; Shore & Wayne, 1983). Meyer and Allen (1991) define three distinct components of organizational commitment. Affective commitment describes an employee's emotional attachment, identification with, and involvement in the organization. Continuance commitment describes the perceived costs associated with leaving the organization. Normative commitment describes a perceived obligation to remain within the organization. It is expected that the greater the value congruence, the more a person would identify with his or her organization, thus reporting greater commitment (Glazer, Daniel & Short, 2004).

Intention to Leave. Intention to leave is a psychological strain related to occupational stressors (Cooper et al., 2001). It is a psychological precursor of the behavioral strain, attrition, found in the ASA model (Schneider, 1987). Jex and Beehr (1991) stated that very little stress research has examined turnover as correlates of job-

related stressors because of all the different variables that come to play when an employee decides to leave a company. Unfortunately, turnover could not be ascertained for this study, but intention to leave was examined. Intention to leave is a valuable measure of employee's reaction to the changing occupational environment in a climate of organizational change (Brotheridge, 2003), as it could alert change managers about possible instability among people within the organization.

In relation to stress and P-E fit, greater organizational commitment and well-being, but lower anxiety and intention to leave are outcomes of fit between aspects of the person and organization (Cooper, et al., 2001; Verquer et al., 2003). Some research has been done to uncover how value congruence is uniquely related with organizational outcomes (e.g., Verquer et al.). Meglino et al. (1989) stated that values have a direct effect on the behavior of individuals in the workplace. In organizations where individuals are able to fulfill their personal work values, they will likely report more positive experiences with the organization (Meglino & Ravlin, 1998). Employees thrive in an environment where their work values are highly congruent with those of the organization, especially because others within the organization will readily understand and accept the actions of others (Meglino & Ravlin).

Elizur and Sagie (1999) noted that there is a growing interest in the analysis of work values, specifically because of their relationship with organizational commitment and turnover. Organizations have been trying to find what role work values play in the organizational environment. Schneider (1987) found that people are attracted to, selected to, and remain with certain jobs and organizations in which their values match those of

the organization. This concept of matching values is related to the ASA model previously described.

Context for Current Study

The organization chosen for this study had been the target of a hostile takeover over a period of 18 months. The organization was known for its clearly espoused core values of “People,” “Customers,” “Quality,” “Innovation,” “Fun,” “Profitability,” and “Integrity.” When legal barriers to the takeover were removed and an agreement was reached, employees learned that the takeover would be completed within one month. Within one month employees would learn their fates in the new organization via a letter delivered to their home address. The details of the letter described one of three options for each employee: an offer of employment within the acquiring company; an offer of transitional employment for a period of a few months; or their employment would be terminated immediately. Two weeks prior to learning their fate with the new company and two weeks after the announcement of the takeover agreement, employees were surveyed regarding their perceptions of work values, stressors, and strains (Time 1). Approximately one month later, after employees had learned their fate and merger activities had begun, employees who remained with the acquired organization were asked to provide their current perceptions of work values, stressors, and strains (Time 2).

This study examines the relationship between work value congruence (i.e., congruence between employees’ self-reports of their own personal values and their personal assessment of their organization’s adherence to those espoused values) and both stressors and strains during the initial period of a corporate takeover. Stressors in this

study include three generic role stressors of role ambiguity, role conflict, and role overload. Strains examined in this study are affective-, normative-, and continuance-organizational commitment, job anxiety, employee well-being, and intention to leave. The research hypotheses are as follows:

Hypothesis 1: In a comparison of data from Time 1 to Time 2, role ambiguity, role conflict, and role overload, as well as continuance commitment, intention to leave, and job anxiety will increase, whereas affective commitment, normative commitment, and well-being will decrease.

Hypothesis 2: Although not a hypothesis in the true sense of a hypothesis: Personal work value ratings will be stable across Time 1 and Time 2 for paired subjects, whereas favorability of perceived organizational work values will decrease from Time 1 to Time 2.

Hypothesis 3: a) Value discrepancy is expected to have a negative correlation with affective commitment, normative commitment, and well-being, but a positive correlation with continuance commitment, intention to leave, and job anxiety during Time 1 and Time 2.
b) These correlations are expected to be significantly stronger during Time 2 than Time 1.

METHODS

Procedures

A link to an on-line structured survey, along with an informed consent form, was distributed via email to approximately 300 professional services employees at a software company undergoing a corporate takeover. The link to the survey was distributed to employees, in cooperation with the department vice president. Employees were given two weeks to complete the survey online and participation was voluntary. All participants were asked to provide a self-selected 5-character (number and letter combination) code that they would then re-use during Time 2 data collection so that participants could be linked.

Participants

The Time 1 survey garnered 170 responses, a 56.7% response rate. Time 2 survey distribution resulted in 86 responses from an unknown number of employees who received the survey. However, due to incomplete surveys, the total number of participants for Time 1 was a maximum of 150 and for Time 2 the sample was a maximum of 76. The Time 2 survey was distributed to the same 300 employee email addresses, however, many of the employees did not receive the second survey due to termination of their employment in association with acquisition activities or the employee's choice to leave the organization. Therefore, a response rate for Time 2 cannot be calculated. However, what can be ascertained is that 39 of the participants who provided responses during Time 1, also responded in Time 2. Thus, the Time 2 survey distribution might have had 47 new respondents (who did not complete the survey from

Time 1). However, the number of employees who also responded to the survey at Time 1 may be underestimated because some respondents indicated not recalling the original 5-character code they created.

Participants' demographics were not significantly different across Time 1 and Time 2, according to results of an independent samples *t*-test for equality of means. Because the dataset was not truly independent, a second independent samples *t*-test was run for a subset of employees, excluding the 39 matched respondents. The results of this independent samples *t*-test for equality of means showed no significant differences between the demographics of Time 1 and Time 2 respondents. A paired samples *t*-test for the 39 matched employees also revealed no significant differences between employee demographics for Time 1 and Time 2. Due to the similar results of the *t*-test analysis of demographics, means are reported for all employees in both survey administrations. Respondents had a mean age of 40.66 (SD = 8.70) and 40.63 (SD = 8.72) years and mean tenure with the organization of 5.17 (SD = 2.88) and 4.76 (SD = 3.17) years for Time 1 and Time 2, respectively. More than 61% of all respondents were male; more than 62% of all respondents were married; and more than 71% of all respondents were White/Euro-American for Time 1 and Time 2. All respondents were full-time employees; more than 95% of respondents listed their department as "Consulting" and less than 7% were members of management for Time 1 and Time 2.

Measures

The survey included demographic questions, job-related information, and a number of previously validated measurements. Measures included in this survey assess

organizational commitment, role stressors, job anxiety, general health (well-being), intention to leave, and work values. Demographic and job-related information are sex, age, marital status, employment status (full-time or part-time), department, position in organization, ethnicity, and tenure within the organization. To alleviate managements' concerns over administrative time and to ensure a high return rate of surveys, almost all measurement scales were reduced to 3 to 4 items each based on highest loadings obtained in a previous study (Glazer, 1999). Items for all measurements were rated on a 5-point Likert-type scale, ranging from 1--Strongly Disagree to 5--Strongly Agree.

Organizational Commitment (see Appendix B, items 1-9). A scale developed by Meyer and Allen (1991) was used to measure affective, normative, and continuance commitment. The original scale of 24 items was reduced to 9 items, three items for each commitment component. Items were selected based on the three strongest factor loading items on two of Meyer and Allen's three factors (i.e., affective and continuance commitment) from Glazer's (1999) study. Normative commitment items were selected based on the three strongest loading items in Meyer and Allen's study. The alpha reliability coefficients for affective commitment were .80 and .86 for Time 1 and Time 2, respectively; for continuance commitment $\alpha = .72$ for both Time 1 and Time 2; for normative commitment $\alpha = .79$ and .85, for Time 1 and Time 2, respectively (see Table 1).

Intention to Leave (see Appendix B, items 10-12). A three-item index of employees' intention to leave their job adapted by Glazer (1999) from the Michigan Organizational Assessment Questionnaire (Cammann, Fichman, Jenkins, & Klesh, 1979;

Seashore, Lawler, Mirvis, & Cammann, 1982) was used here. Cronbach alpha reliability for this measure was .90 for Time 1 and .74 for Time 2 (see Table 1).

Role Conflict, Role Ambiguity, and Role Overload (see Appendix B, items 13-21).

Nine items with the highest factor loadings in Glazer's (1999) study were used in this study. Glazer adopted the measure for role stressors from previous research studies (Abdel-Halim, 1978; Beehr, Walsh, & Taber, 1976; Rizzo, House, & Lirtzman, 1970). Role conflict had reliability coefficients of .66 for Time 1 and .70 for Time 2. The alpha reliability coefficients for role ambiguity were .75 and .83 for Time 1 and Time 2, respectively. The coefficient alphas for role overload were .76 and .67, for Time 1 and Time 2, respectively (see Table 1).

Job Anxiety (see Appendix B, items 22-24). Three of five job-related anxiety items from Parker and DeCotiis (1983, cited in Glazer, 1999) were employed. The three items retained had the highest factor loadings in Glazer's dissertation. Cronbach alpha coefficients were .70 and .76 for Times 1 and 2, respectively (see Table 1).

Well-Being (see Appendix B, items 25-31). Seven items, adapted and selected from a twelve item general health scale developed by Goldberg (1972, cited in Senatore, 2003), were used to measure general sense of well-being. Five items were eliminated from the study due to low factor loadings in the Senatore study, item wording that conflicted with other measures, or by request of the organization. A factor analysis on the Senatore data indicated that items loaded on two general health factors (behavioral and psychological health). Items with factor loadings below .56 and those items with loadings greater than .45 on both factors were eliminated for this study. The item "I have

felt constantly strained” was also eliminated due to its use of the word “strain” and potential overlap with our other measures of strain. The organization was also concerned by the number of items in the scale with a negative health connotation, for example, “I have been thinking of myself as a worthless person.” As a result, their request to remove some negative items was honored. Like Senatore, this measure was modified to be congruent with the other scales. The modified version reworded the items into “I” statements for example, the original questionnaire had a stem followed by 12 items such as, “lost much sleep over worry.” This was reworded to “I have lost much sleep over worry.” In addition, the scale was modified from a 1-4 scale ranging from ‘not at all’ to ‘very often’ to the 5-point Likert-type scale described above. Cronbach alpha reliability coefficient for General Health for Time 1 was .72 and for Time 2 it was .76 (see Table 1).

Personal and Organizational Work Values (see Appendix B, items 32-61). A list of work values was comprised of the explicitly stated espoused values of the organization, “People,” “Customers,” “Quality,” “Innovation,” “Fun,” “Profitability,” and “Integrity.” Additional work values, based on research by Elizur and Sagie (1999) were deemed important and also included. These were “Job Security,” “Opportunity for personal growth,” “Recognition for doing a good job,” “Influence within the organization,” “To do complete and meaningful work,” “Independence in work,” “Contribution to society,” and “Feedback (concerning the results of your work).” Respondents rated items in terms of the extent to which they agreed that the work value “is important as a guiding principle in my work life” and the extent to which the value “is important to my organization as a guiding principle.” Cronbach alpha reliability for Personal Work Values Time 1 and

Time 2 was .88 and Cronbach alpha reliability for Organizational Work Values was .93 for both Time 1 and Time 2 (see Table 1).

Value Congruence. The absolute score of the difference between ratings (i.e., subtracting personal agreement with the value from perception of organization's adherence to the values) on each value was interpreted as a lack of value congruence. To obtain a value congruence score, the average of all discrepancy scores on each of the values was averaged per respondent. Cronbach alpha reliability for Value Discrepancy was .89 for Time 1 and .91 for Time 2 (see Table 1).

RESULTS

Comparison of Means

In order to test Hypotheses 1 and 2, mean scores on the study variables were compared from Time 1 to Time 2. Hypothesis 1 was partially supported by a quasi-independent samples *t*-test for equality of means across Time 1 and Time 2 for stressors, strains, and values. The *t*-test was not fully independent as 39 employees who took the survey in both Time 1 and Time 2 are represented in the analyses. Role *ambiguity* increased significantly from a mean of 2.61 in Time 1 to 2.90 in Time 2, $t(221) = -2.15, p < .05$. The increase in means (from 2.71 to 2.85) for *role conflict* was not significant. Means for *role overload* decreased from Time 1 to Time 2, from 2.61 to 2.48, although the decrease was not statistically significant. The *t*-test for organizational commitment indicated a significant decrease in *affective commitment* from Time 1 ($\underline{M} = 3.17$) to Time 2 ($\underline{M} = 2.59$; $t(224) = 4.21, p < .001$). Similarly, *normative commitment* showed a significant difference in the expected direction, the mean score decreased from 2.95 to 2.60 across Time 1 to Time 2, $t(224) = 2.57, p < .05$. *Continuance commitment*, *job anxiety*, *employee well-being*, and *intention to leave* showed no significant differences in the *t*-test for equality of means across Time 1 and Time 2 samples.

Although the two groups were not truly independent, in that 39 employees took the survey in both Time 1 and Time 2, the independent samples *t*-test for equality of means was re-run, excluding the 39 matched participants from the Time 1 dataset. In addition, a paired samples *t*-test was run for the 39 matched employees. Results for the

Table 1

Means, Standard Deviations, and Reliability Coefficients of Stressors, Strains, and Work Values

Variable	Time 1 (<i>n</i> = 150)			Time 2 (<i>n</i> = 76)		
	Means	SD	α	Means	SD	α
Role Ambiguity	2.61	0.81	.75	2.90	0.99	.83
Role Conflict	2.71	0.81	.66	2.85	0.83	.70
Role Overload	2.61	0.81	.76	2.48	0.77	.67
Job Anxiety	2.88	0.88	.70	2.93	0.96	.76
Employee Well-Being	3.70	0.60	.72	3.63	0.66	.76
Affective Commitment	3.17	0.91	.80	2.60	1.00	.86
Continuance Commitment	2.84	0.89	.72	2.77	0.91	.72
Normative Commitment	2.95	0.90	.79	2.60	1.00	.85
Intention to Leave	3.09	1.04	.90	3.09	1.16	.74
Personal Work Values	4.22	0.43	.88	4.15	0.45	.88
Organization Work Values	3.63	0.69	.93	3.41	0.72	.93
Value Discrepancy	0.90	0.59	.89	1.01	0.67	.91

independent samples and the paired samples *t*-tests revealed the same significant and nonsignificant relationships between Time 1 and Time 2.*

*True independent samples *t*-tests were run to ensure that the results of the initial independent samples *t*-tests were not erroneous due to the overlap of respondents from Time 1 and Time 2. Results indicate that by excluding matched employees (between

To test Hypothesis 2, that personal values are stable across time, 39 participants were matched by their self-selected identification code and demographic information. The hypothesis was supported by the results of a paired samples *t*-test in which the means on personal work values across Time 1 ($\bar{M} = 4.17$, $SD = .47$) and Time 2 ($\bar{M} = 4.14$, $SD = .32$) were not significantly different. Furthermore, there was a significant difference ($t(37) = 2.505$, $p < .05$) in employees' perceptions of the organization's work values between Time 1 ($\bar{M} = 3.54$, $SD = .69$) and Time 2 ($\bar{M} = 3.29$, $SD = .71$).

Correlation Analysis

Given the support for hypothesis 2, it was deemed acceptable to proceed with testing hypothesis 3 using the full samples for Times 1 and 2. Results indicate strong correlations between stressors and value discrepancy (see Table 2). Data for both Time 1 and Time 2 provide support for Hypothesis 3a, as significant correlations between value discrepancy and both stressors and strains were found. At Time 1, value discrepancy showed significant positive correlations with role conflict ($r = .40$, $p < .01$), role

Time 1 and Time 2) yielded significant differences for Time 1 ($n = 105$) and Time 2 ($n = 76$) on role ambiguity (with a mean increase of 2.57 in Time 1 to 2.90 in Time 2; $t(175) = -2.46$, $p < .05$), affective commitment (with a mean decrease of 3.21 in Time 1 to 2.59 in Time 2; $t(179) = 4.40$, $p < .001$), and normative commitment (with a mean decrease of 2.98 to 2.60 across Time 1 to Time 2, respectively; $t(178) = 2.62$, $p < .05$). No significant differences were found in mean scores for role conflict (from 2.70 to 2.85), role overload (from 2.64 to 2.48), continuance commitment (from 2.78 to 2.77), job anxiety (from 2.82 to 2.93), well-being (from 3.74 to 3.63), and intention to leave (from 3.08 to 3.09).

A paired samples *t*-test, with an n of 39 also revealed significant differences between Time 1 and Time 2 on role ambiguity ($\bar{M} = 2.68$ and $\bar{M} = 3.05$, respectively; $t(39) = -2.43$, $p < .05$), affective commitment ($\bar{M} = 2.96$ and $\bar{M} = 2.37$; $t(38) = 5.15$, $p < .001$), and normative commitment ($\bar{M} = 2.84$ and $\bar{M} = 2.42$, respectively; $t(39) = 2.82$, $p < .05$). No significant differences were found in mean scores for role conflict (from 2.81 to 2.97), role overload (from 2.58 to 2.58), continuance commitment (from 2.96 to 2.78), job anxiety (from 3.07 to 3.21), well-being (from 3.58 to 3.49), and intention to leave (from 3.14 to 3.28).

ambiguity ($r = .34, p < .01$), and role overload ($r = .34, p < .01$). At Time 2, value discrepancy also showed significant positive correlations with role conflict ($r = .54, p < .01$) and role ambiguity ($r = .45, p < .01$), but the correlation with role overload was not significant.

Continuance commitment was the only measure of strain that was not related to value discrepancy. The remaining strain measures had Pearson correlations at the $p < .01$ level of significance with value discrepancy at both Time 1 and Time 2. For Time 1 there was a significant negative correlation between value discrepancy and affective commitment ($r = -.42$), normative commitment ($r = -.36$), and well-being ($r = -.27$). For Time 2 there was also a significant negative correlation between value discrepancy and affective commitment ($r = -.59$), normative commitment ($r = -.53$), and well-being ($r = -.31$). Time 1 and Time 2 data also showed significant positive correlations between value discrepancy and both intention to leave ($r = .43, r = .50$, respectively) and job anxiety ($r = .42, r = .38$, respectively).

In order to test if the correlations were significantly stronger in Time 2 compared to Time 1 (per Hypothesis 3b), Fischer's z' transformation was employed (Cohen & Cohen, 1983). Results of the analysis revealed that the differences in correlations between Time 1 and Time 2 were not statistically significantly different. Thus, Hypothesis 3b was not supported.

Table 2

Correlations among Stressors, Strains, and Values for Time 1 (n = 138; lower-left) and Time 2 (n = 72; upper-right)

Variables	1	2	3	4	5	6	7	8	9	10
1 Role Ambiguity	--	.35**	.24*	-.40**	.06	-.34**	.30**	-.52**	.33**	.45**
2 Role Conflict	.26**	--	.47**	-.29*	-.16	-.38**	.51**	-.23*	.45**	.54**
3 Role Overload	.11	.48**	--	-.17	.02	-.19	.42**	-.31**	.34**	.23
4 Affective Commitment	-.37**	-.23**	-.04	--	.07	.82**	-.47**	.53**	-.51**	-.59**
5 Continuance Commitment	.26**	.08	.17*	-.11	--	.17	.04	-.13	-.19	-.29*
6 Normative Commitment	-.32**	-.25**	-.15	.70**	-.03	--	-.50**	.52**	-.69**	-.53**
7 Job Anxiety	.36**	.27**	.49**	-.23**	.40**	-.24**	--	-.68**	.60**	.38**
8 Well-Being	-.52**	-.32**	-.37**	.34**	-.52**	.26**	-.65**	--	-.54**	-.31**
9 Intention to Leave	.40**	.31**	.36**	-.39**	.18*	-.47**	.52**	-.45**	--	.50**
10 Value Discrepancy	.34**	.40**	.34**	-.42**	.12	-.36**	.42**	-.27**	.43**	--

** $p < 0.01$.

* $p < 0.05$.

DISCUSSION

The aim of the present study was to examine the interrelationships between occupational stressors, strains, and value congruence during organizational change. As organizations continue to undergo radical change (e.g., mergers, acquisitions, stock buyouts, downsizing, and globalization) in an attempt to compete in the global marketplace the employer-employee relationship will be redefined (Kickul, Lester, & Finkl, 2002). Studies such as this are necessary to explore the consequences of major organizational change on employees, particularly employees' stress that is likely to ensue during a corporate takeover (Jimmieson et al., 2004).

In order to achieve the goals of the study, data were collected two times. During the first time period of data collection (Time 1) employees of the acquired company were aware of a pending takeover; however, no other action had been taken. The same type of data were collected one month later (Time 2), subsequent to employees learning their initial fate within the merged organization and merger activities being initiated. Employee perceptions were compared across these timeframes in order to determine if there is a relationship between occupational stress and the organizational changes taking place.

The three hypotheses were partially supported by the results of the study. Overall, results of the study indicate that the greater the fit between the employee and organization, during a climate of major organizational change, the better the outcomes in terms of stressors and strains. In other words, with greater congruence between an individual employee's values and his or her perception of the organization's values, the less likely

the individual would perceive role stressors and certain strains (e.g., affective commitment, normative commitment, well-being, job anxiety, and intention to quit).

The first hypothesis compared employees' responses at two times on role stressors and strains. One role stressor, role ambiguity, showed a significant increase from the merger announcement to its execution. An increase in ambiguity is not surprising, given the fact that the goals of the acquiring organization may not be well-defined when the merger begins. In this climate of change, employees may no longer feel confident regarding what is expected of them in their jobs. Searle and Ball (2004) found that a lack of communication and the associated ambiguity was indicative of a negative merger experience for employees.

Neither role conflict nor role overload were significantly different from Time 1 to Time 2. This result may be due to the fact that employees' new roles were not yet sufficiently defined by the acquiring organization (hence, ambiguity) to produce additional conflict or overload. It is logical that the initial role stressor experienced during major organizational change would be ambiguity; role conflict and overload may follow later, dependent upon the execution of the merger activities. In support of this logic, the results of a two-year longitudinal study of organizational change by Jimmieson et al. (2004) suggest that role ambiguity (measured at Time 1) was related to Time 2 indicators of employee adjustment, measured two years later, whereas the other role stressors from Time 1 were not. Future studies should continue to track role stressors for longer periods of time during integration of merged organizations.

A significant decrease in affective and normative commitment was found in comparing employee responses from Time 1 to Time 2. These results indicate that employees felt less affinity for the organization once the acquisition had taken place and felt less of an obligation to remain with the organization. These results were in the hypothesized direction and are consistent with previous studies (e.g., Brotheridge, 2003; Dackert et al., 2003) in which employees had a tendency to be less affectively committed subsequent to organizational change, when organizational change was implemented without regard to the needs of organizational members. However, more studies on this subject are needed in order to better understand the different relationships of organizational change to the distinct constructs of affective, normative, and continuance commitment.

The strains of continuance commitment, job anxiety, well-being and intention to leave did not show significant differences between their means from Time 1 to Time 2. This may be due to employees' heightened awareness of the pending merger during Time 1 having a distinct but equally detrimental effect on employees as the execution of the merger during Time 2. At Time 1, the announcement of the takeover had already been made public to all of the employees of the organization. Employees were aware that in association with the impending takeover, many employees would lose their jobs. They did not yet know if their employment would be terminated. Lack of change from Time 1 to Time 2 might be symptomatic of the continuing intention to leave. However, the increase in role ambiguity in Time 2 due to continuing organizational change, might also be the main source for lower affective commitment in Time 2 (in relation to Time 1).

Intention to leave might not have shown significant changes in the hypothesized direction due to withdrawal of individuals between Time 1 and Time 2, who would have otherwise indicated a greater intention to withdraw had they not yet left. For example, those with the greatest intention to leave during Time 1 might have quit or been terminated during the month between surveys, but now in Time 2 there is a new group of people with an intention to leave, due to the ambiguity of the organizational change effort.

As hypothesized (Hypothesis 2), means for personal work values from Time 1 to Time 2 were not significantly different, whereas means for perceived organizational work values decreased significantly from Time 1 to Time 2. This decrease in employee ratings of organizational values indicates that employees perceived the organization to be reducing its endorsement of values that had been valued previously after the merger activities had taken place. The lower organizational value ratings might be indicative of poorly executed or communicated merger activities (Jimmieson et al., 2004). The findings are consistent with research describing detrimental effects of mismatched espoused organizational values during a merger on organizational performance (Daly et al., 2004). Daly et al. found a negative relationship between value congruence of two firms' espoused values and their post-merger financial performance. However, the current study's measures of organizational values are based on the perceptions of employees, rather than a comparison of the documented values of the acquiring and acquired organizations. Future studies should consider a separate calculation of value congruence to measure differences in organizations' espoused values, by assessing

employees' perceptions of the acquiring organization's values in relation to their perceptions of the acquired organization's values.

Results provided partial support for hypothesis 3a; value discrepancy (i.e., the lack of value congruence) positively correlated with all role stressors for Time 1. During Time 2 role conflict and role ambiguity positively correlated with value discrepancy. The correlational data for value discrepancy and strain indicated that all strains in the study, except for continuance commitment, correlated significantly with value discrepancy for both Time 1 and Time 2. In other words, as value congruence increased, affective commitment, normative commitment, and well-being increased, but intention to leave and job anxiety decreased. Thus, the more work values are aligned between the employee and the organization, the less likely the employee is to perceive strain.

Employees' reactions in the context of a merger may depend greatly upon how the merger is carried out. That is, is the action perceived to be consistent with the acquired organization's values (Daly et al., 2004)? If the actions are perceived as consistent with the acquired organization's work values, value congruence would likely remain high, resulting in a consistent (low) level of stressors and strains in Time 2, compared to Time 1. However, if the merger announcement is carried out in a manner inconsistent with the work values of the acquired organization, higher levels of value discrepancy are likely to have a stronger correlation with stressors and strains. Results of this study indicate the correlation between value congruence and strain was not significantly different between Time 1 and Time 2, failing to support hypothesis 3b. Failure to find significant results may have been due to the short period of time (one

month) between surveys (and thus not enough time for employees to truly get a sense of the new organization's values). Jimmieson et al. (2004), in a similar study of the effects of organizational change on the restructuring of an organization, allowed for a period of two years to elapse between data points. One month might not be enough time to assess people's perceptions of changes in stressors, strains, and values. Alternatively, it is possible that the values held by the acquired organization are not very different from the acquiring organization.

Practical Implications

This study provides insight into the relationship between organization-level variables and occupational stress. Significant correlations between value congruence and strain demonstrate the importance of the alignment of employees' personal work values and those of the organization. These findings arm an organization with information that could help reduce employee strain during a corporate takeover. An organization, whose actions are perceived as consistent with its espoused values, and consistent with employees' personal values, should have greater value congruence. If organizations successfully ensure that their actions are consistent with employees' values, then there would likely be lower levels of strain. Sanders (2001) endorses a need for the direction of stress research to move toward developing this type of organization-level or "system-level" stress interventions.

The most common stress interventions, individual-level stress interventions, focus on modifying employees' coping strategies (Bellarosa & Chen, 1997), thus putting the onus on the person. In a climate of rapidly changing organizations, these employee-

focused intervention strategies fail to address the underlying cause of the stress, which is the organization. These organizational antecedents are most prevalent during a merger (Sanders, 2001) and the burden for coping should not be placed on the individual, but on the organization to ensure the smoothest transition possible. Organizations, in order to protect themselves and their employees from the negative consequences of occupational stress during organizational change, should address organizational level variables, such as the effect of change on the organization's ability to live up to the espoused values of both the acquiring organization and the organization being acquired (Kickul et al., 2002).

Results of this study also indicate that role ambiguity is likely to increase during organizational change. This finding is in itself valuable, as it highlights the importance of communicating with employees about their roles during the course of the transition and thereafter. It is important to provide as much information as possible to employees during organizational change, in order to reduce the likelihood of role ambiguity. Jimmieson et al. (2004) describes the keys to managing organizational change with respect to reducing stressors and strains for employees. The key characteristics of the change are the effectiveness of leadership, the extent to which the implementation process is consultative, and communication.

Failure of organizations to live up to the expectations of employees during an acquisition, might be associated with increased stressors, as well as increased strains and subsequent outcomes of employee stress (e.g., lowered performance). Results of this study indicate that the affective and normative commitment of employees is likely to decrease during an acquisition. This indicates a fundamental change in the employer-

employee relationship over a short period of time; in the case of this study, it was one month. Organizations should make every effort to hold on to a sense of commitment. However, this is a difficult challenge when employees no longer know to whom they are committed and when they do not know the full story as to why an organizational merger and/or acquisition occurred.

Human resources departments, as a protector of employees, have been successful in taking a leadership role in helping to reduce employee experience of strain during organizational change (Teo & Waters, 2002). Jones (2003), in weighing the costs of stress, describes the necessity for organizations to engage in a policy of “corporate social responsibility” to mitigate the damage of strain. Business leaders, as the stewards of growth in the global economy, have a responsibility to their employees and, in turn, a responsibility to society (Jones). Kickul et al. (2002) recommend that organizations, while planning and executing a merger, establish clear and fair procedures and make an extra effort to ensure all employees are treated with respect and dignity. All of these practices might prove successful in mitigating potential damage of organizational change on employees’ affective responses to the organization, such as affective and normative commitment.

Limitations

In this study, Time 1 and Time 2 are intended to represent a “before” and “after” snapshot of employee perceptions with regard to the actual merger activities. However, due to the fact that the acquired company had been the target of the takeover attempt for the previous 18 months, it was not possible to get a true picture of employee perceptions

“before the merger.” Ideally, a pre-Time 1 survey would be distributed to get a better picture of the perception of work values, stressors, and strains present under the previous leadership within the acquired company, that is, prior to any knowledge of a pending merger. Furthermore, perceptions of the merged organization were collected for Time 2 only 2 weeks after the announcement of the new organizational structure. As of Time 2, many employees had not yet witnessed any changes within their department, and therefore could not perceive a difference in the new organization. If the Time 2 survey had been distributed at a later time, after additional organizational changes were executed, perceptions of stressors, strains, and values, as a reflection of the merged organization, might have been more accurate.

Of the employees who participated in this study, 97% were employed within the consulting division of the organization. The majority of these employees work remotely, from customer sites or from home, rather than working from a traditional office location of their organization. Remoteness of the work environment might have affected employees’ responses on stressors, strains, and values. Surviving employees might have learned of colleagues who were let go, but they did not necessarily feel the effects in the office, as their home or client site was the office. Future studies could further assess this by studying whether there is a difference in stressors, strains, and value congruence for employees who work remotely versus those who do not.

It is also possible that because this study was done internally, people were not trusting of the system that was set up. Although employees received an informed consent form attached in the initial email and reiterated in the survey, receiving surveys internally

was not uncommon to the organization and employees might not have read the informed consent form. For this reason, many of the respondents might not have trusted the system through which data were collected--perhaps concerned that their responses would in some way impact decisions for determining who would remain and who would be terminated.

Also, because responses to all variables came from one source (the employee), there is potential response bias. Employees might be affected by social desirability to appear favorable to the acquiring organization (Kickul et al., 2002).

Another limitation of the current study was the inability to ascertain the rate of attrition and extent of lay-offs during the merger. The Attraction—Selection—Attrition theory indicates that an increased misfit between the employee and organization during a merger is likely to result in employee turnover (Schneider, 1987). The organization did not provide the number of employees who quit or were laid-off between Time 1 and Time 2 of the survey. Not only did this prevent the calculation of an accurate response rate for Time 2, but it made assessing the Time 1 survey responses for differences between employee perceptions between those who quit, those who were let go, and those who remained with the organization impossible. A study of differences in perceptions of stressors, strains, and values among these three samples of the population would have proved interesting regarding the different consequences of organizational change.

Reliability of the survey measures was potentially limited by the exclusion of items, at the organization's request. Management, within the organization, required that the survey be kept as short as possible and the number of items had to be reduced.

Nonetheless, results of reliability estimates indicate that reliability was not impacted by the reduction of the number of items.

Analysis of changes in variables from Time 1 to Time 2 may have been affected by the use of a quasi-independent samples *t*-test because the samples were not truly independent. The presence of 39 employees, whose responses were matched from Time 1 to Time 2, prevented the samples from being truly independent. Given this limitation, the same analysis was performed on a dataset of truly independent samples and also matched samples. The truly independent samples *t*-test and the paired samples *t*-test revealed the same significant relationships as the first.

Based on analyses conducted in this study, it is impossible to know whether change observed from Time 1 to Time 2 was truly meaningful or if random fluctuation was due to measurement error, as measurement error was not taken into account (Chan, 1998). However, the fact that analyses for Hypothesis 1 were conducted in three ways, and results remained consistent, encourages greater confidence that the observed changes were in fact meaningful and a result of organizational change.

Future Directions for Research

The lost productivity associated with occupational stress, when measured in lost productivity and loss of revenue, can be severely damaging to the future prospects of an organization (Jones, 2003). Organizations must understand the relationship between organizational change and occupational stress in order to prevent strain and subsequent financial losses (Kahn & Byosiére, 1992). Future research on stress and organizational

change research should focus on the financial cost of stress during mergers and acquisitions.

Perhaps the most important aspect of studying organizational change is time. To get an accurate assessment of the effect of organizational change it is important to measure employee perceptions prior to the change and subsequent to the change. Depending on the nature of the change, whether a restructuring, a friendly merger of two like-minded organizations, or a hostile takeover, gaining access to a sample of employees can be difficult. Particularly difficult is the ability to measure employee perceptions prior to employee knowledge of organizational change. Future research focusing on organizational change might seek to leverage previous survey data done within organizations. In the current climate of rampant mergers, the existence of a previous survey on employee perceptions, prior to knowledge of the merger, might be leveraged as Time 1 data, and a new survey could be distributed for Time 2.

When comparing employee perceptions over time, it is important to have access to data regarding employee turnover. This might be difficult in the context of a merger; often data regarding the number of employees who left the company voluntarily and those whose positions were eliminated is closely guarded. However, without access to data on employee attrition, less is understood about consequences of stress and organizational change.

There continues to be a need for shorter assessments of stress (Faragher, Cooper, & Cartwright, 2004; Hurrell, Nelson, & Simmons, 1998). In a corporate setting, the shorter the survey, the more likely the organization will allow its distribution to

employees. Especially when research requires multiple survey distribution times, it is important to measure multiple constructs in a concise form, without sacrificing reliability or validity. Continued progress on shortened assessment tools of stress will be valuable in the study of stressors and strains during organizational change.

Future research on this topic must continue to explore methods of measuring value congruence. Core to this research is a better understanding of person-environment fit, and its relationship with organizational change. The current practice of using the absolute value of the difference between personal work values and perceptions of the organizational work values might not prove to be the ideal method of calculation (Meglino & Ravlin, 1998; Verquer et al., 2003). Future studies should consider calculating the value discrepancy only for those work values where perceived organizational values are lower than personal values. Misfit might only be relevant if organizational work values are perceived to fall short of personal work values. If an employee rates his or her own work value lower than he or she perceives the organization to endorse it then the consequences of this type of misfit might have different consequences. It is recommended that depending on the direction of the discrepancy between work values, whether ratings are higher for the person or the organization, these differences should be studied distinctly.

Further, value discrepancy on individual values, such as job security should not necessarily be averaged with value discrepancy scores for values, such as fun. In addition to separating values based on their content, in the case of an acquisition, espoused values for both the acquired and the acquiring company should be assessed.

Conclusion

Results of this study indicate that congruence between employees' work values and the organization's espoused values correlate with stressors and strains. Organizations have the opportunity to act in alignment with the espoused work values shared by their employees and abide by those values as guiding principles during organizational change. These actions might help prevent increased role ambiguity and decreased affective and normative commitment found during organizational change. Moreover, increased value congruence, irrespective of organizational change, is correlated with lower levels of job anxiety and intention to quit, and higher levels of employee well-being and affective and normative commitment.

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APPENDIX A

Informed Consent for a Survey Questionnaire

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Employee Well-Being During Major Organizational Change

Informed Consent for a Survey Questionnaire

The purpose of this survey questionnaire is to obtain information about employee well-being during times of major organizational change. This information is being acquired for **research purposes only**. Your responses will remain **confidential**. Only the researcher and research advisor will have access to data of individual respondents; information you provide will be held in the strictest confidence. No one within PeopleSoft or Oracle will receive raw data. **Responses to this survey have no effect upon integration activities between PeopleSoft and Oracle.**

This questionnaire will be distributed twice in order to determine causal links between Time 1 and Time 2. The second distribution of this survey will be at the end of January. In order to be able to match respondents from Time 1 to Time 2, we are asking you to choose a 5-character identifier that will be known only to you. Please choose a 5-character (letters and numbers) ID that you can easily remember (please avoid consecutive numbers; ideally, you should include at least 1 letter or 1 number in order to reduce the likelihood of the same 5-character combination). You may use your employee id if you wish, but it is not required. **Please remember this five character id for use when the second survey is distributed.**

The link to the survey is maintained by a neutral third party firm, outside of the PeopleSoft network. There is **no tracking of respondents** by individual computer or network sign-ins. Your **confidentiality is of the utmost importance**. Feel free to complete the survey from any computer with access to the internet.

The survey consists of two sections. The first section of the survey asks questions related to your job and perceptions about the organization. The second section asks you to rate your identification with and the organization's demonstration of values.

Completion of the survey is entirely voluntary. You may withdraw at any time. Choosing not to participate in completion of this survey will not affect your relations with San Jose State University, PeopleSoft, or Oracle. Again, this survey is for research purposes only. **No individual, except for the researcher, from PeopleSoft or Oracle will have access to individual data.** Questions in this survey are not expected to cause harm or discomfort to any participant. Overall results of this study may be published.

The questionnaire will take about 10-15 minutes to complete. Should you have any questions, comments, or concerns about this research, please call me, Mark Zajack at (925) 846-3216. For further information or questions you may also contact Dr. S. Glazer, research advisor at (408) 924-5639. Any complaints about the research should be made to: Dr. S. Bienenfeld at (408) 924-5600. Questions about research subjects' rights or research-related injury may be presented to Pam Stacks, Ph.D., Associate Vice President, Graduate Studies and Research at (408) 924-2480.

Your time and effort is much appreciated.

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Bakersfield, Channel Islands, Chico
Dominguez Hills, Fresno, Fullerton,
Hayward, Humboldt, Long Beach,
Los Angeles, Maritime Academy,
Monterey Bay, Northridge, Pomona,
Sacramento, San Bernardino, San Diego,
San Francisco, San Jose, San Luis Obispo,
San Marcos, Sonoma, Stanislaus

APPENDIX B

Survey

Employee Well-Being during Major Organizational Change

Employee Demographics

Please complete the following items describing you and your position within the organization. You were asked to select a 5-character identifier of your responses when surveyed in January. This enables the tracking of your responses across your completion of the first survey and now. You may have used your employee ID, or any combination of numbers and/or letters you were likely to remember. Your ID and all other demographic information is collected for research purposes only. Your responses will remain confidential.

- a) Did you take the "Employee Well-Being Survey" distributed in January?
- b) If "Yes," what was the 5-character ID you created? (If "No," continue to the next question.)
- c) Age (at last birthday)
- d) Gender
- e) Marital Status
- f) Employment Status
- g) Tenure with PeopleSoft (in years)
- h) Department
- i) Position in organization
- j) With which of the following do you most closely identify yourself?

Please indicate your level of agreement with the following statements regarding your job and the organization.

(1—Strongly Disagree, 2—Disagree, 3—Neither Agree Nor Disagree, 4—Agree, 5—Strongly Agree)

- 1. I feel "emotionally attached" to my organization.
- 2. My organization has a great deal of personal meaning for me.
- 3. I feel a strong sense of belonging to my organization.
- 4. Right now, staying with my organization is a matter of necessity as much as desire.
- 5. I feel that I have too few options to consider leaving my organization.
- 6. One of the few negative consequences of leaving my organization would be the scarcity of available alternatives.
- 7. My organization deserves my loyalty.
- 8. I would not leave my organization right now because I have a sense of obligation to the people in it.
- 9. I owe a great deal to my organization.

10. I often think about quitting.
11. I will probably look for a job in the next year.
12. I will actively look for a job in the next year.

13. I work with two or more groups who operate quite differently.
14. I receive incompatible requests from two or more people.
15. I do things that are apt to be accepted by one person and not accepted by others.

16. I receive an assignment without the resources to complete it.
17. It seems like I have too much work for one person to do.
18. On my present assignment, the amount of work seems to interfere with how well I can do the job.

19. Explanation is clear of what has to be done.
20. I have clear, planned goals and objectives for my job.
21. I know exactly what is expected of me.

22. My job gets to me more than it should.
23. I have felt fidgety or nervous as a result of my job.
24. There are lots of times when my job drives me right up the wall.

25. I have felt capable of making decisions about work.
26. I have lost much sleep over worry about work.
27. I have been able to face up to my problems at work.
28. I have been losing confidence in myself at work.
29. I have been feeling unhappy or depressed at work.
30. I have felt that I am playing a useful part at work.
31. I have felt that I can't overcome my difficulties at work.

Please indicate your level of agreement regarding the importance of the following values.

The following value is important to me as a guiding principle in my work life:

(1—Strongly Disagree, 2—Disagree, 3—Neither Agree Nor Disagree, 4—Agree, 5—Strongly Agree)

32. People
33. Customers
34. Integrity
35. Quality
36. Innovation
37. Fun
38. Profitability
39. Job Security

- 40. Opportunity for personal growth
- 41. Recognition for doing a good job
- 42. Influence within the organization
- 43. To do complete and meaningful work
- 44. Independence in work
- 45. Contribution to society
- 46. Feedback (concerning the results of your work)

The following value is important to my organization as a guiding principle:

(1—Strongly Disagree, 2—Disagree, 3—Neither Agree Nor Disagree, 4—Agree, 5—Strongly Agree)

- 47. People
- 48. Customers
- 49. Integrity
- 50. Quality
- 51. Innovation
- 52. Fun
- 53. Profitability
- 54. Job Security
- 55. Opportunity for personal growth
- 56. Recognition for doing a good job
- 57. Influence within the organization
- 58. To do complete and meaningful work
- 59. Independence in work
- 60. Contribution to society
- 61. Feedback (concerning the results of your work)

If you have any additional comments regarding your work values, please indicate below:

Thank you for completing the survey! Please click "Done" to submit your answers.

APPENDIX C

Human-Subjects Institutional Review Board Approval Letter

San José State
UNIVERSITY

**Office of the Academic
Vice President**

**Academic Vice President
Graduate Studies and Research**

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To: Mark Zajack
1137 B Kottinger Drive
Pleasanton, CA 94566

From: Pam Stacks,
Interim AVP, Graduate Studies & Research

Date: February 9, 2005

The Human Subjects-Institutional Review Board has approved your request to use human subjects in the study entitled:

“Employee Well-Being during Major Organizational Change.”

This approval is contingent upon the subjects participating in your research project being appropriately protected from risk. This includes the protection of the anonymity of the subjects' identity when they participate in your research project, and with regard to all data that may be collected from the subjects. The approval includes continued monitoring of your research by the Board to assure that the subjects are being adequately and properly protected from such risks. If at any time a subject becomes injured or complains of injury, you must notify Pam Stacks, Ph.D. immediately. Injury includes but is not limited to bodily harm, psychological trauma, and release of potentially damaging personal information. This approval for the human subjects portion of your project is in effect for one year, and data collection beyond February 9, 2006 requires an extension request.

Please also be advised that all subjects need to be fully informed and aware that their participation in your research project is voluntary, and that he or she may withdraw from the project at any time. Further, a subject's participation, refusal to participate, or withdrawal will not affect any services that the subject is receiving or will receive at the institution in which the research is being conducted.

If you have any questions, please contact me at (408) 924-2480.

cc: Sharon Glazer