Surviving Mergers and Acquisitions:

Post-merger Impact on Organizational Identification

Tasha Green Cruzat

TABLE OF CONTENTS

ABOUT THE AUTHOR

Tasha Green Cruzat, a United States Navy veteran, is the President of Children's Advocates for Change. In her previous role as President of Voices for Illinois Children, she scored several major Illinois legislative victories including leading the advocacy efforts in the passing of the Illinois Racial Impact Note Act. Tasha held numerous leadership roles in the nonprofit, state, and local government sectors. She holds several board positions and is a member of the prestigious International Women's Forum. Tasha received several awards, military service medals, and letters of commendation and recognition. In 2019, she was honored and named Chicago Defender's Women of Excellence. In 2021, Tasha was appointed to Senior Fellow of The Center for Biotechnology and Global Health Policy at the University of California Irvine School of Law. She was recently named a 2021 Governor Jim Edgar Fellow at the Institute of Government and Public Affairs, University of Illinois System. She holds a BA in Political Science from Brooklyn College, an MA in Education Administration from the University of Illinois at Chicago, an MBA from the University of Notre Dame, and will obtain her EdD in 2021 from Vanderbilt University.

On January 1, 2021, two Illinois early childhood nonprofit organizations, the Chicago Child Care Society and Family Focus, officially merged into a single, legal entity. The newly merged organization assumed the Family Focus name and carries a new motto, "stronger together," to symbolizing its unified purpose and position. The new organization's headquarters are located in the Hyde Park neighborhood of Chicago, Illinois, and provides holistic, stabilizing family support, home visiting, and childcare services to over 20,000 families and children annually. In its new legal form, Family Focus has enlarged its footprint to 12 centers in the metropolitan Chicago area, which includes the city's south side, south suburbs, and north and western suburbs. The organization's current combined assets total over $30M and has as operating budget of $25M. The staff size is just under 400 people, where 80% represent full-time employees and the remaining 20%, are comprised of part-time and seasonal workers.

Conversations between the leaders of Chicago Child Care Society and Family Focus began almost three years ago. They believe that by combining the strengthens, expertise, and financial and human capital resources, they would maximize growth opportunities, increase their geographical footprint, and have considerable impact on more families and communities. To ensure a successful merger and post-merger integration phase, a Merger Integration Task Force was formed and is led by the new President and CEO of Family Focus. This group is comprised of executive staff from each pre-merger organization and their goals and efforts are centered around creating systems and structures that equitably represent both institutions.

Family Focus hired a branding and marketing consultant to determine the appropriate corporate identity that captures the likeness of both institutions. Such strategic actions aim to reduce the possibility of conflict between the two organizations, manage potential complexities of one group feeling lesser than the other, and minimize areas of difference and tensions-points.

The purpose of this study is to understand how employees are faring with the merger and what challenges employees are facing during the post-merger integration phase. The following research questions guided the study:

1	How are employees feeling about the newly merged organization?
2	To what extent do employees identify with the newly merged organization?
3	What strategies are leaders using to ensure that employees identify with the newly emerged organization?
4	How do employees perceive these strategies?

I conducted semi-structured, in-depth qualitative interviews with the newly merged Family Focus staff and stakeholders to address the research questions. I also examined various pre-and post-merger documents, including but not limited to correspondence, communication, organizational charts, policies, and a recent survey administered several months after the

closing of the merger deal. ***Several themes and patterns emerged from the data collected that led me to conclude with the following***

FINDINGS:

Employees have expressed a need for clarity regarding how each organization will entirely fit into the new structure, specifically programs and services.

Employees have an overall sense of job security. However, there are feelings of uncertainty about new roles, responsibilities and reporting structure.

Employees have deep organizational identification with their pre-merged organization; nevertheless, they recognize value in the newly formed organization and solid synergies and alignment of missions with their merging partner.

Employees have a general feeling of inclusiveness and support from the organization; however, the COVID 19 pandemic has impacted the ability for the staff to effectively engage with other staff members.

Employees recognized that not much has changed since the merger closing but noticed a culture shift as the organizations fully integrate.

Based on the findings, I recommend Family Focus to take the following actions:

1 Provide opportunites for more introduction and exposure of programs and services to all employees. As COVID-19 restrictions continue to be lifted, leaders should arrange for in-person training or educate staff on how each centers functions and operates.

2 Ensure that all roles and job responsibilities are clarified.

3 Continue to celebrate the accomplishments of staff/team victories.

4 Develop more meaningful opportunities for in-person activities, meetings and collaboration across programs and services of each pre-merger organization.

5 Hire consultants to help develop a culture that embodies the characteristics and values of each organization and fosters a climate where employees can reach their full potential and thrive.

6 Conitune on the path of achieving a merger "of equals" (although very difficult to accomplish).

INTRODUCTION

Formal conversations of a merger between the Chicago Child Care Society and Family Focus emerged as early as December 2018. During the exploration and due diligence phase, both organizations' board members and key stakeholders were amenable to pursuing the merger and claimed value in enlarging its footprint primarily because this meant greater service delivery to more families and children in the region. Secondarily, they believe another achievement gained through the merger would be cost-savings outcomes of combining the organizations' back-office operations, financial and technology infrastructure, and systems.

To move the merger idea into action, the President and CEO of the Chicago Child Care Society and the President and CEO of Family Focus (who at the time announced her plans to retire) formed the Joint Negotiating Committee comprised of members from both organizations. This Committee oversaw the merger due diligence and activities. They created a new board of directors (with the first term board chair appointed from Family Focus) structure evenly with comprised members from each pre-merger organization. The board members and key stakeholders believed that equal representation of Committee members and board members, helps ensure fairness and equal representation in the merger process and activities. They choose to pursue this "win-win" strategy because they also believed a merger of anything less than that of equals would give the impression by staff and internal and external stakeholders that the union is, in fact, a "take-over" or "acquisition" of one entity over the other. The Committee believes that to achieve a successful integration, all parties must feel

empowered, energized, and optimistic about the coming together of two well-regarded and highly respected nonprofits.

Upon completion of the merger due diligence, the Committee retired, and a Merger Integration Task Force was formed to oversee and manage the post-merger integration process. Specifically, they were charged with ensuring a successful integration of both institutions' operations, human capital, policies, and practices and creating a culture that continues to embody the same values-based, family-centered approach that existed in each organization before the merger.

The newly appointed President & CEO of Family Focus is interested in ensuring that the organization achieve critical progress towards full integration and that staff is highly productive, engaged, and committed to the new organization's mission and vision. Therefore, the purpose of this capstone is to understand how employees are feeling in the post-integration phase. Specifically, I investigated to what extent employees identify with the new organization and whether they are experiencing any uncertainty or confusion related to their future with the organization. Family Focus is also hopeful that the study results can inform leadership on critical elements of policies and practices that will help create and foster a new, improved culture.

ORGANIZATIONAL CONTEXT & OVERVIEW

This section will provide an overview of the Chicago Child Care Society and Family Focus organizations prior to the merger closing January of 2021.

Chicago Child Care Society

The Chicago Child Care Society began as an orphanage in 1849 to serve and care for those Chicago-area children who were left homeless after their parents lost their lives due to the cholera epidemic. The 170-year-old nonprofit transitioned from its original work of caring and providing shelter for orphaned children to administering comprehensive early childhood education, childcare, youth and family support services, and community-based education programs. Its footprint extends beyond Chicago's Hyde Park neighborhood to the south suburban communities. Chicago Child Care Society serves more than 1500 children and families annually. Chicago Child Care Society focuses on birth to age three. They provide such services as in-home pre- and post-natal services, early head start weekly home visits, developmental screenings and child referral developmental services and child developmental disability and non-disability services. Licensed by the Department of Children and Family Services and the City of Chicago, the full-day preschool centers serve ages six weeks to 5 years old in Chicago's Hyde Park and South Shore neighborhood communities. The Hyde Park Preschool is accredited by the National Association of Young Children (NAEYC) and boasts of having the state's second-highest quality rating from ExeleRate Illinois.

Prior to the merger, the Chicago Child Care Society's annual budget was $9.6M with a sizable endowment of $20M. There were 111 full-time employees and nine part-time employees. Despite the current COVID-19 pandemic, economic crisis, and financial challenges facing Illinois, the organization maintained a strong path of sustainability and growth. Several years ago, the Chicago Child Care Society purchased a thriving childcare business, built state-of-

the-art classrooms at their corporate headquarters, and added new services and programs to assist clients through the COVID-19 pandemic.

Family Focus

Headquartered in the Greektown neighborhood of Chicago, Family Focus was founded in 1976 by Bernice Weissbourd of Evanston, Illinois.   Since then, Family Focus has provided early childhood home visiting, after-school programming, and family support services annually to Illinois to over 18,500 children and their families. Family Focus operates seven centers in the north, west, and south suburbs of the Chicagoland area: Aurora, Dupage, Englewood, Evanston, Family Network, Lawndale, and Nuestra Familia (with four satellite locations), impacting underserved communities with high-risk factors. Aligned with the Chicago Child Care Society, Family Focus concentrates on the early stages (prenatal to five years old) in a child's life to significantly reduce adverse childhood experiences. These critical services include home visiting, doula services, parenting classes for parents of abused children and teen fathers, and specialized services to Chicago's immigration population.

Before the merger, Family Focus' budget was $16M. There were approximately 194 full-time and 80 part-time employees. Several years ago, Family Focus experienced a period of deep financial hardship brought on by slow payments from the state of Illinois for services already performed under the contract. However, after pressure from child advocates, public interest groups, and the media, the state fast-tracked back payments to Family Focus which played a significant role in regaining their financial stability. Family Focus legacy was able to continue delivering the same services and programming once state funding was restored.

THE MERGER

Chicago Child Care Society
- ✓ Founded in 1849
- ✓ $9.6M operating budget & $20M endowment.
- ✓ 111 full-time employees & 9 part-time employees.

CHICAGO CHILD CARE SOCIETY

Family Focus
- ✓ Founded in 1976
- ✓ $16M operating budget
- ✓ 194 full-time & 80 part-time employees.

FAMILY FOCUS
Nurturing Children • Strengthening Families

Family Focus
- ✓ $25.6M operating budget
- ✓ $20M endowment
- ✓ Over 400 employees

FAMILY FOCUS

The Joint Negotiating Committee met at least monthly from mid-2020 through early winter 2020 to engage in discussions regarding to strategic fit. They collected and shared key documents and other information needed to make an assessment on whether to merge the two organizations. The Committee performed their due diligence by examining records from both organizations including but not limited to company bylaws, incorporation documents, organizational charts, financial audits, completed Internal Revenue Service 990 forms, contracts, grants, purchase agreements, board meeting minutes, intellectual property, material assets, and legal liabilities.

A Merger Integration Task Force consisting of the staff's leadership was also formed to work in tandem with the Committee to ensure the due diligence process went smoothly. Together, they crafted a set of guiding principles (outlined in Table 1) and used them as a framework when performing and monitoring their work and engagement with each other. They were also used to make critical decisions that support the overall merger process. The guiding principles continue to be used by the Merger Integration Task Force in the post-merger integration phase.

Table 1: The Joint Negotiating Committee Task Force & Merger Integration Task Force Guiding Principles

MERGER INTEGRATION TASK FORCE GUIDING PRINCIPLES	
1	*Decisions are deliberately made in the spirit of productivity and optimism for the success of the new organization.*
2	*Throughout the process, share timely merger information with affected staff and stakeholders that is relevant and honest.*
3	*Help all stakeholders see the many positive benefits of a merged organization that more holistically supports the needs of under-resourced families and children of Cook County.*
4	*Have honest dialogue that allows stakeholders to complete the merger successfully.*
5	*All participants should actively participate to ensure that everyone has a voice and create more robust solutions.*
6	*Develop a merged organization that will create new opportunities for career growth and development for staff.*

Since the merger closing on January 1, 2021, the organization discontinued the work of the Joint Integration Committee and retained the Merger Integration Task Force that consisted of staff members from both pre-merger organizations to roll out the post-integration merger phase. The Merger Integration Task Force has already begun executing integration in some areas, including combining the two organizations' executive leadership teams, payroll systems, employee benefits, and technology software and hardware systems. As part of their deliverables, they must ensure that outcomes of the integration activities and decision-making, result in an equal and fair representation of each merging partner. The President and CEO of Family Focus developed and assigned workstreams to the Merger Integration Task Force

consisting of executive staff from each pre-merger partner. The workstream is outlined in

Table 2.

Table 2: Workstream & Deliverable

Workstream	Deliverables
Change Management/Employee Engagement & Communication	o Ensure the message provides comfort versus trepidation o Set the table, organize the schedule for employee comms o Serve as a feedback source for questions/concerns o Plan combined benefits fair for all employees
Program Assessment and Consolidation	o Review program analysis o Program integration o ID funders in-common o ID opportunities and rationale for growth strategies o Discuss the social justice aspect of the work and begin to create a framework to see programming through a social justice lens
Program Enhancement and New Opportunities	o Youth development o Support for Immigrant families o Discuss the social justice aspect of the work going forward and begin to create a framework to see programming through a social justice lens o Medicaid Billing
Financial Systems Integration	Oversee integrating Financial and Fund Development systems supported by Quattro
IT Integration	TDB
Capital Needs	TBD
Fund Development	o Plan and execute fundraising strategies for the merger and the combined organization o Meet or exceed annual fund budgeted goals o Integrate fundraising staff, define functions and positions and reporting structure o Scheduling and participating in meetings with Dara and critical current and potential funders o Oversee all activities related to the Spring Gala

These merger of equals efforts started earlier in the merger process where the Joint Negotiation Committee decided to keep the Family Focus name due to its state-wide brand recognition and larger footprint in service delivery. To maintain the integrity and spirit of a merger of equals, the Committee decided to retain the Chicago Child Care Society's Tax Employer Identification Number (EIN). However, there is also a huge benefit due to the multitude of benefits they receive under a unique state of Illinois charter. Family Focus also hired Bernadette Davis Communications to begin logo and website redesigns that capture the literal image of both organizations. An outside facilitator worked with the Committee to combine and modify the mission and vision statements. The final editing and rework of these statements were performed by both the current and former President and CEO of Family Focus. A study by Hinsley (2017) notes that the less dominant organization (or lower status organization) often loses its name, experiences more significant loss of its employees, and has its practices superseded. While the Chicago Child Care Society lost its name in the merger deal, status, in this case, is difficult to ascertain since the integration phase is not complete.

LITERATURE REVIEW

In this section, I review research related to Mergers and Acquisition (M & A) integration and the impact of such events on employees or members of pre-merger organizations. According to van Knippenberg (2002), a merger is the formal recategorization of two or more social groups as one new group. While there are wins and challenges associated with M & A integration, Family Focus is particularly interested in how the merger has impacted their

employees and how to improve organizational culture as the organization fully integrates and settles into its new identity.

M&A and Organizational Identification Culture

The term "organizational identification" surfaced in much of the research as a concept associated with M&As due to the psychological impact that occurs when major events such as a merger occurs within an organization. The definition of organizational identification "is the perception of oneness with or belongingness to a group, involving direct or vicarious experience of its successes and failures" (Ashforth & Mael, 1989, p.34). Some of the research implies that employees' organizational identification can "shift" when companies merge to form a new entity which may require leaders to act as the new identity takes shapes. A study by Balmer and Dinnie (1999) asserts that after a merger, the new corporate identity must be carefully nurtured to allow its members (or employees) and other stakeholders to identify with the new organization. Strategies by leaders would not only entail nurturing corporate identity and culture work to strengthen organization identification, but a study by Rouzies and Colman (2012) asserts that other factors such as social interactions (including collaborative work activities with deadlines assigned by managers) between merging partners, can foster organizational identification. This research led me to further explore possible factors that could impact employees' organizational identification as they experience major changes in the workplace.

Social Identity Theory

Van Knippenberg (2002) uses Social Identity Theory to explain employees' mental state during the merger process. He asserts that during the M & A process, psychological shifts can occur and impact an employee's organizational identification. Social Identity Theory, which originated from Henri Tajfel and others social theorists such as John Turner, is a psychological social theory that explains group processes and intergroup (two or more groups) relations where emphasis is placed on mediating the relationship between social structure and the individual behavior (Hogg, Terry and White, 1995). Hogg et al. (1995) explains how people tend to define themselves based on their perception of the world and the social categories (and in turn, is based on individual characteristics, personal identity, and social identity which could be one or more in groups in which they belong to). The theory also suggests that when an organization is going through major change, this can alter a person's behavior (or cause emotional or psychological shifts in their behavior) if it can modify their self-identity, which comes from the emotional attachment of their pre-merged organization (Hogg, Terry, & White, 1995). Fundamentally, it is inferred that negative psychological shifts experienced by the employees could put the organization at risk of merger failure.

Social Identity Theory also implies that if the person's pre-merged organizational identification is strong, it will be challenging to have high identification with the post-merger organization. However, more robust post-merger organizational identification can result in positive outcomes such as less conflict and higher motivation levels (Giessner, Ullrich, and van Dick, 2011). Van Dick's (2006) study identifies other effects associated with stronger

organizational identification such as lower turnover and absenteeism, and higher job

satisfaction.

Identity Continuity

The notion of a "sense of continuity" (van Knippenberg, 2002) explains how

organizational identification can be strong or weak depending on how well there is continuity

from their pre-merged organization to the new organization. Van Knippenberg's (2002) study

reveals that members' organizational identification is contingent upon a "sense of continuity"

and the extent of dominance in the merger relationship between the partnering organizations

(van Knippenberg, 2002). The more dominant the partner in a company merger situation, the

stronger the individual's organizational identification is with the more dominant organization.

Van Knippenberg's (2002) findings asserts that management time and attention to best

practices in corporate identity and corporate communications are inseparable elements of the

merger process. He further explains how these best practices can be an effective antidote to

merger failure or other possible threatening factors exhibited by leaders such as

disengagement with employees or not being inclusive. Joseph's (2014) research supports the

notion of "continuity" as a factor that impacts whether a merger succeeds or fails. Specifically,

he asserts that inherent "discontinuities" of merger strategies are the main inhibitor in

achieving a positive post-merger integration (Joseph, 2014). These discontinuities can lead to

interruptions in operations and derail the post-merger integration phase. Ulrich's (et al., 2005)

research findings revealed similar results about the impact of discontinuity in that when change

is designed in discontinuous ways in an M & A situation, employees may experience uncertainty

and feeling as though they are not performing the same role/job before the merger. As a result, the absence of continuity in the post-merger integration can negatively impact employees' post-merger organizational identification. Ulrich (et al., 2005) also asserts that the subjective experience of continuity after a merger is determined by the link between past and present and the road map into the future and further explains the essential role leaders can play in the M & A process to build trust and work to avoid behavior that is not inclusive and non-engaging.

Hinsley (2017) suggests a slightly different culprit that could hinder merger success which implies that from the time a merger deal is disclosed, employees will likely experience identity threat because they fear losing what made their group distinctive. Therefore, a practical application to lessen identity threat is incorporating distinctive elements from pre-merged organizations (Hinsley, 2017). These distinctive elements would constitute an important effort to manage continuity by incorporating parts of the pre-merger organization or familiar elements, whether policies or practices, into the new organization. Lipponen's (2017) study supports the notion of identity threat having a negative impact in a merger situation. The most apparent threat revolves around whether pre-merger organizations will be adequately and fairly represented in the newly merged organization (Lipponen et al., 2017).

The Seo and Hill (2005) study asserts several underlying theories that can explain the sources of problems (including employees' psychological and behavioral issues) emerging at different stages of the M&A integration. The theories are outlined in Table 4 affirms predicted outcomes and provides prescriptive measures or recommendations (noted in the last column). The notion of Social Identity Theory is asserted in the Seo and Hill (2005) study where it

explains how, for example, the loss of old identities in a merger or acquisition can cause a sense

of anger, grief, and loss. However, these problems can be mitigated by holding grieving

meetings with employees and proactively assessing the strengths of their existing identities and

framing new ones (Seo and Hill, 2005).

Table 4: Underlying Theories in M&A (Seo and Hill, 2005)

Underlying Theories	Sources of Problems	Predicted Outcomes	Related Prescriptions
Anxiety Theory	Uncertainty and anticipated negative impact on career and job. Prolonged anxiety and uncertainty	-Low productivity -Self-centered behaviors -Mental and physical illness -Lack of motivation	-Top-down communication; social support; participation in decision making; training managers to empathize and listen to employees; golden parachutes. -Ongoing communication; speeding up transition
Social Identity Theory	**Loss of old identities (organizational, professional, work group) Interacting with other organization's members**	**-Sense of loss, anger, and grief** **-Denial and refusal of change Intergroup bias and conflict Acts of noncompliance**	**-Disengagement efforts (grieving meetings); proactively assessing strength of existing identities and framing new identities to be more appealing.** **-Creating a new identity; fostering cross-organizational arrangements and activities**
Acculturation Theory	Contact with or adjustment to different organizational culture	-Acculturative stress and resistance -Interorganizational tension and conflict Culture clash	Cultural due diligence; fostering multiculturalism; facilitating intercultural learning; heightening awareness of thinking and behaviors that cause culture clash to develop
Role Conflict Theory	Ambiguous and conflicting roles	Low productivity Low job satisfaction	Two-way communication; leadership of role clarification
Job Characteristics Theory	Changes in post-M&A job environments	-Job satisfaction and commitment -Absenteeism/turnover	Post-M&A job redesign; employee involvement in job design; job transfer training

Organizational Justice Theory	Perceived fair treatment of surviving and displaced employees	-Psychological withdrawal - Turnover	Fair and objective human resource management; equal participation in decision making; treating employees with dignity and respect

Summary

The Chicago Child Care Society and Family Focus were looking to increase in size, create more impact and value, and efficiencies, and found an opportunity to merge entities. While M&As can be an attractive strategy in this case, the post-merger integration phase can have many complexities and challenges that could derail the intended outcome or compromise the reasons for pursuing the merger. I uncovered research regarding post-merger integration that claims combining facets of the organizations such as human resources, IT, or finance, can be quite stressful and challenging for employees but also the mere announcement of the merger can be quite emotional for employees. The literature also explains how psychological behaviors that people experience during a merger such as fear, uncertainty, confusion, and culture clashes are issues leaders are faced with while managing the many moving parts of integration work.

CONCEPTUAL FRAMEWORK

From the literature review, I learned that organizational identification plays a vital role in the post-merger integration phase and that the stronger an employee's organizational identification, there is the likelihood of a successful integration. Social Identity Theory (SIT) (highlighted in Table 4) has been applied to the study of M&A to better understand the identity dynamics in terms of employees' reactions, feelings, emotions, commitment, and loyalty in the
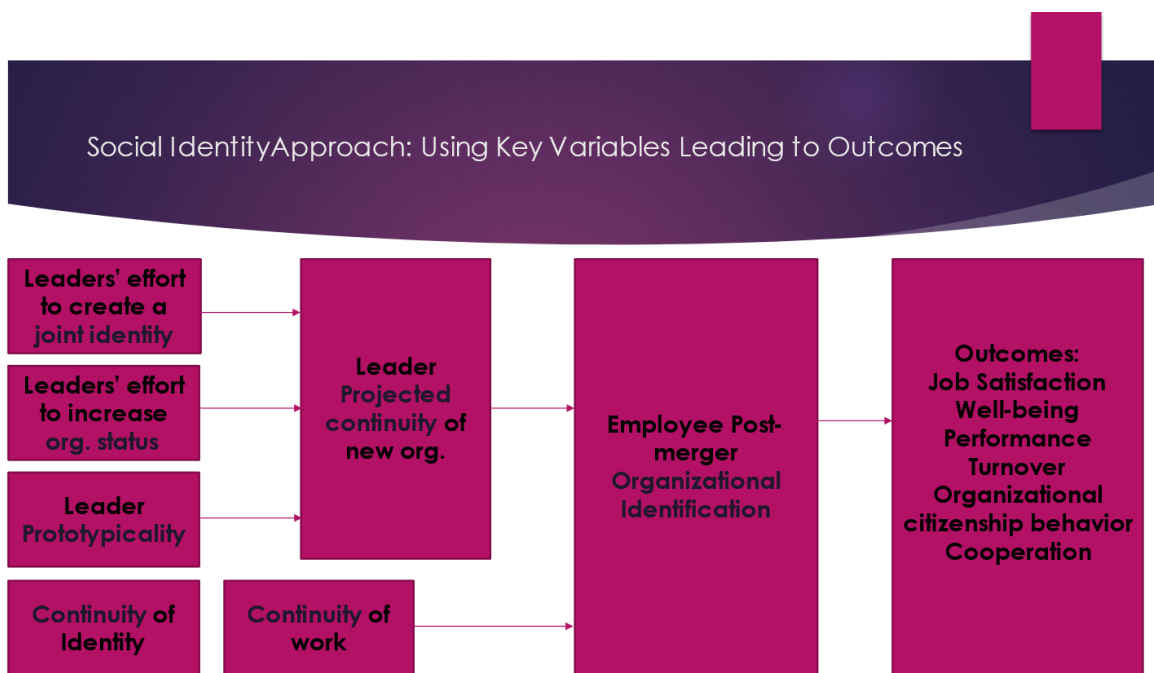
post-merger integration phase. Social identity research has revealed effective strategies to aid

in a successful post-merger integration (Joseph, 2013). Drawing on the literature review and

using a social identity approach as a fundamental principle in examining key variables and

assessing the dynamics of human reaction in a merger climate, I adopted key variables (Figure

A) developed by Giessner et al. (2011). These variables were used to construct a framework

that guides this project and help to better understand how well the Family Focus (newly

merged entity) employees are faring in the post-merger integration phase.

On the **far-left side of the framework** are key variables or inputs from leaders that can

impact organizational identification as the individuals transition from their pre-merged

organization to the new organization. **"Leader efforts to create joint identity"** (Giessner et al.

2011) points to how leaders play a key in creating a collective identity in the merger process

and what is required of them to focus on leading change and managing it carefully. The next

variable or input is **"leaders' efforts to increase merged organization status"** (Giessner et al.,

2011). This variable is key for leaders when there is a possible identity threat. Leaders should

be astute in recognizing when one of the merging partners feels like they are the "lower status"

organization in the merger deal. Increasing the status of the new organization and shepherding

the employees in the merger process could mitigate instances of identity threats. Giessner et

al., (2011), notes that the Social Identity Approach asserts that **"prototypical leaders**" are well

positioned to promote mergers. **"Projected continuity of identity**" can increase post-merger

identification, and as noted in the Giessner, et al. (2011) study, leaders can play a critical role in

achieving high post-merger identification by creating a strong **"sense of continuity**."   As

gathered from the literature review, a "sense of continuity" plays a significant role in whether

employees will transition to a post-merger organizational identity (Rousseau, 1998). More

robust post-merger organizational identification can result in positive outcomes such as less

conflict and higher levels of motivation in a merger (Giessner, Ullrich, and van Dick, 2011). In

van Knippenberg's et al. (2002) theoretical analysis, he asserts that post-merger organizational

identification is contingent on a "sense of continuity" and that "sense of continuity" depends

on the extent to which individuals own pre-merger dominates in the merger.

Again, organizational status can be skillfully managed by leaders. The inputs/variable

from the left side of the framework, if managed properly, can strengthen post-merger

organizational identification. Outcomes are on the far-right side of the framework can be

achieved if leaders manage variables/inputs from the right side.

Figure A: Social Identity Approach to Organizational Identification Framework

Social IdentityApproach: Using Key Variables Leading to Outcomes

Leaders' effort to create a joint identity			
Leaders' effort to increase org. status	Leader Projected continuity of new org.	Employee Post-merger Organizational Identification	Outcomes: Job Satisfaction Well-being Performance Turnover Organizational citizenship behavior Cooperation
Leader Prototypicality			
Continuity of Identity	Continuity of work		

RESEARCH QUESTIONS

The purpose of this study is to understand how employees are faring with the merger and what challenges employees are facing during the post-merger integration phase. The following questions guided the study:

1. How do employees feel about the newly merged organization?

2. To what extent do the organization's members identify with the newly merged organization?

3. What strategies are leaders using to ensure that employee identification with the newly emerged organization?

4. How do employees perceive leader efforts to create joint identity?

METHODS

This capstone project took a qualitative approach to gain insight into employees' experiences, thoughts, and opinions regarding the merger. This approach to collecting data through in-depth interviews and examining an employee engagement survey administered after the merger, contained open-ended and closed-ended questions. I also looked at pre-and post-merger organization documents, including but not limited to correspondence,

communication, organizational charts, policies, and employee handbooks that to better understand the data collected from the interviews.

Interviews:

Family Focus employees participated in semi-structured, in-depth qualitative interviews. Research on organizational identification, Social Identity Theory and the concepts outlined in the framework informed the design of the interview questions. Rather than using the language of the research scholarship, I asked questions that could explain how employees are feeling in the post-merger integration phase. Questions regarding communication and messaging were a key aspect in gaining insight into what information leaders provided to employees during the merger and any key decisions made because of the merger. The interview also included showing each participant the new organization chart and asking them what is working and not working under the new structure. Table 5 contains the open-ended interview questions used in the interviews with the Family Focus employees and stakeholders.

Table 5. Interview Questions

Research Questions:	Interview Questions:
How do employees feel about the newly merged organization?	1) Please say anything that comes to mind when you think of Family Focus? 2) What aspects of the organization make you proud? 3) What characteristics set the organization apart from other nonprofits in the field? 4) What are your reactions to the new organizational structure? 5) How is the organization responding to the needs of the employees? 6) How has the organization changed since the merger announcement? 7) How has your role changed since the merger? 8) Looking at the new organizational chart, what areas are running smoothly? 9) What areas are not running smoothly? 10) What would you have done differently from those in charge of the merger? 11) What do you expect to see in 12 months? 12) What would you like to see in 12 months?

To what extent do employees identify with the newly merged organization?	1) How do you identify with Family Focus? 2) How do you identify with your current work team?
What strategies are leaders using to ensure that employees identify with the newly?	Managers/ Senior Managers: 1) How have you ensured that employees are feeling like they are a part of the new organization?
How do employees perceive these strategies?	1) How has the organization changed since the merger announcement?

The research questions are outlined and matched with the interview questions that help to answer and provide further insight to the problem of practice.

The Vice President of Human Resources sent a recruitment email to all 394 employees, board members, and parent committees outlining the purpose of the interviews. Nineteen members from the organization expressed interest, and I contacted all to confirm their participation. There was a total of 10 respondents out of 19 in which all participated in the interview. The low response could be attributed to survey fatigue. Prior to finalizing the merger, employees and stakeholders participated in several surveys and provided feedback regarding the merger. Before the merger, the Chicago Child Care Society performed annual engagement surveys. Following the closing of the merger, all employees were invited to participate in the annual survey.

Participants were contacted by phone or email to schedule one-on-one interviews in 60-minute time blocks. Interviews lasted on average between 60 and 90 minutes. The interviews were conducted remotely either by phone or videoconferencing. In-person interviews were prohibited as COVID-19 pandemics safety guidelines and restrictions were in place.

The ten interviewees were representative of different areas and levels from both pre-merger organizations. I interviewed five Chicago Child Care Society members; three mid-level, one executive and one board member. The other five participants were members of Family

Focus: four mid-level and one executive. All interviews were recorded, and the data was transcribed verbatim with "filler" words edited out of the transcript. Information about the interview was not transcribed nor included in the final transcript. Metadata collection for each interviewee included their name, date, time length of the interview. The transcribed interviews were analyzed and coded using a hybrid approach of both inductive and deductive coding. Using the inductive coding method, seven codes were captured from raw data that emerged from the literature review. The data was reduced to short phrases/words that represented text or a larger body of information from other studies' theories, ideologies, and research findings. The codes and their description are outlined in Table 6.

Table 6: Inductive codes from the literature review

Codes	Code Descriptions
Continuity	Program, services, policies, processes, practices, rituals, routines, etc., remained the same or uninterrupted,
Discontinuity	Change or break-in program, services, policies, processes, practices, routines, etc.
Feeling Dominated	Instances where employees felt that their pre-merger organization is dominated.
Uncertainty	A situation or something that is uncertain.
Feeling of Confusion	Lack of understanding of an activity, event, situation, etc.
Central	What employees believe is the greatest importance and central to the organization.
Distinctive	Having qualities or characteristics that are unique or standout amongst other nonprofits in the same or similar field.

Using a deductive method involved creating codes identified in the interviews. A total of 20 codes from the interview and literature review were identified, defined, and grouped accordingly, are outlined in Table 3. This master key contains the list of codes grouped under the following categories:

- Inclusiveness and Support

- Organizational Identification and characteristics

- Merger outcomes in need of attention

- Threats to merger success

The second column of Table 5 provides the number of snippets/quotes (145) associated with the code sub-topic. The code descriptions are noted in Table 5.

Table 7: Master key of codes

# Snippets	Code Name	Code Description
	Inclusiveness and Support	
3	Feeling Connected | Belongingness	The employees feel connected or informed of what is going on in the organization. Employees feeling a part of the organization.
7	Feeling disconnected	Employees feel that there is a disconnect in service or policy.
8	Feeling supported	Instances where employees supported or not supported.
5	Inclusiveness | Inequities	Instances of unfair treatment or unfairness during and after the merger.
2	Job Security	Instances where employees have a sense of job security
8	Personal needs	What employees need to perform their job better.
	Merger Outcomes in Need Attention	
6	System Improvements & Merger Strategies	Suggestions or feedback on merger outcomes.
	Organizational Identification & Characteristics	
9	Central	Refers to what employees believe to be greatest importance and central to the merged organization.
11	Changed	Changes in policies, processes, or the way the organization handles its business.
10	Continuity	Continuity in activities, policies, procedures, practices, etc., in terms of the way the organization does business, has remained the same.
6	Discontinuity	Change or break in program, services, policies, processes, practices, rituals, routines, etc.
8	Distinctive	Having qualities or characteristic that makes the organization different from other organizations.
10	Organization Pride & Admiration	What participants are proud of and admire about the organization.
10	Post-merger identification	How employees identify with the organization after the merger.
5	Pre-merger Identification	How employees identify with the organization before the merger.
	Threats to Merger Success	
7	Feeling Dominated	Instances where employees feel that their pre-merged organization is dominated.

11	Feelings of Confusion	Lack of understanding.
8	Job clarity | Job Insecurity	Instances where clarity is needed or there is a fear of losing their job.
4	Perceived Negative Outcomes	Decision made by management that may not have been well-received.
6	Uncertainty	A situation or something that is uncertain.

Archival Documents and Artifacts

Archival documents and artifacts from Chicago Child Care Society and Family Focus were

collected and examined to better understand the information gathered from the interviews and

in some cases, help gain insightful information that could help answer the research questions.

The archival documents and artifacts outlined in Table 4 were analyzed, examined, and used to

help answer the research questions.

Table 8: Organizational documents and artifacts aligned with the research questions.

Research Questions:	Organization Data & Artifacts:
How do employees feel about the newly merged organization?	o Organizational charts
To what extent do employees identify with the newly merged organization?	o 2021 Employee Engagement Survey
What strategies are leaders using to ensure that employees identify with the newly?	o Pre- and post-merger communications correspondence (FAQs)
How do employees perceive these strategies?	o 2021 Employee Engagement Survey

Organizational Chart:

To understand the progress of the integration phase of the merger from an employee

perspective, I presented each participant with the new organizational chart (see Appendix A).

Nine of the ten participants were familiar with it, meaning they had either seen it or were

provided a copy of it by the organization.   I asked each participant to react/share anything that

came to mind regarding the new structure and to identify areas of the organization they felt were running smoothly.

My assessment of the new chart (compared to previous ones of both pre-merger organizations) is that at the executive/senior leadership level, job titles and roles were modified. Mid-level managers and below from the pre-merger organizations remain separate with no modifications in titles. The *Frequently Asked Questions* (FAQ), (Appendix B), indicates that the program and services will integrate by the end of 2021. The company headquarters will be the Hyde Park location.

Employee Engagement Survey:

The 2021 Employee Engagement survey was examined and used to confirm responses from the data/information captured in the interviews. The 45-question survey consisted of closed- and open-ended questions and was categorized into three sections: Work engagement, Compensation, and Benefits. The survey was available to all Family Focus employees from April 14th, 2021, to April 26th, 2021. Out of the 400 employees invited to participate, 201 completed the survey. The write-in (open-ended) responses were helpful for they provided more detailed answers than closed-ended questions.

Frequently Asked Questions:

Information regarding the new benefits policy is contained in the FAQ. Pre-merger Family Focus employees experienced the most changes regarding the benefits policy; however, the FAQ noted that the benefits package is designed to offer an attractive benefit for the newly merged organization. For example, the pre-merger Family Focus vacation policy offered more

vacation/paid time off than Chicago Child Care Society. The newly merged organization

adopted the pre-merger Family Focus policy. The new modified vacation benefit was a gain for

Chicago Child Care Society, and not necessarily for Family Focus; however, there was continuity

in this benefit policy because there was no change. In other words, the benefit remained flat.

According to a recent survey administered in April of this year by Family Focus, 84.6% are

satisfied with their total benefits package as compared to 66.2% in the 2020 survey.

In this section, I detail findings from the analysis and examination of in-depth open-

ended interviews, closed-ended (which contained some open-ended questions) employee

engagement survey, and organizational documents to answer the following:

1. How do employees feel about the newly merged organization?

2. To what extent do the organization's members identify with the newly merged organization?

3. What efforts are leaders using to ensure that employee identification with the newly emerged organization?

4. How do employees perceive leader efforts to create joint identity?

Finding One: Employees have expressed a need for clarity regarding how each organization will entirely fit into the new structure, specifically programs and services.

While Family Focus has combined and streamlined leadership positions, roles, and responsibilities, program and services consolidation has yet to integrate. Leadership expressed the integration of program and service are complex because of the existing grant requirements and restrictions they must adhere to. They also noted that each grant has a specific timeline of deliverables and expenditure reporting so combining programs and services before the grant period ends, could put the organization at risk of not following protocol or performing the grants as stipulated in the agreements. However, delaying the integration of programs and services has been challenging for employees to learn about how their pre-merger partner's programs and services are administered and managed. During the interview, a Chicago Child Care employee expressed, *"I still feel that we don't really know about each other's programs. My team specifically have mentioned before that they would like to know more about what services Family Focus provide so that more families can benefit from their services."*

Another concern regarding the programs and services is that employees are concerned that management has yet to indicated when and what program and services will actually come together. Although the *FAQ* (Appendix B) notes that the Integration Teams plans to fully integrate the two organizations by the close of 2021, may not have been enough to make employees feel at ease.

The Seo and Hill (2005) study indicates that any feelings of uncertainty or job prolonged anxiety left unaddressed could result in low productivity, a lack of motivation, self-centered behaviors, and mental and physical illness. Hogg, Terry, and White (1995), noted that these

negative shifts in psychological behavior could put the organization at risk of merger failure. During the interviews, employees shared while they were not necessarily concerned about job loss, they are unsure if there will be changes or modifications to their current roles and responsibilities, especially since programs and services had not yet been integrated. A Family Focus participant expressed the following regarding job security: ***"When the merger was announced, there was a sense of fear for many staff about losing their jobs… Not all questions are answered but it's enough communication to ease everyone's mind."*** Another participant (from the Chicago Child Care Society) shared that they felt at ease about the merger as it pertains to their job. They complimented leadership not only on how clear they were in their communication but how they shared their efforts and desire to not eliminate or dismantle teams with drastic changes:

"I like that the people on the very top are communicating with us. They are introducing themselves and making it very clear that they are here to support us and are not trying to make drastic changes in the organization except to merge and work together. "

Responses from the April 2021 Employee Engagement survey supports the comments made by employees regarding job security. The survey finds that **86.1% agree or strongly agree that they are satisfied with their overall job security.** When examining the FAQ, I noted that the document included the intent of the merger, which was to expand programs and services to support more children and their families. The FAQ did not mention or imply that the Merger

Integration Task Force's desire is to reduce force as the organizations merged.   The observation of the Merger Integration Task Force's intent is further supported by the following excerpt taken from the FAQ:

"There may be some overlap across functions between the two companies. While we anticipate opportunities for cost savings may be realized in the long-term, the primary motivation for this merger is to continue to expand not to find immediate efficiencies or cost savings."

While there may not be widespread concerns regarding job security, uncertainty exists amongst employees regarding significant changes to job roles and confusion regarding job responsibility and reporting structures. The employees were presented with the new organization chart that showed changes reflecting the upper management portion during the interviews.   They commented on what they felt was going well or not going well with some of the new changes in place. *"As we headed into the new calendar, year some positions are new, so people are trying to wrap their minds around what the position's functions and who will be doing it."* An overwhelming response indicated confusion regarding specific roles and responsibilities, who they ultimately reported to, job title changes and new functions. A Family Focus participant shared the following commented:

"I have some confusion over who is my direct supervisor. Certain duties fall under each supervisor. There are emails between all of us and so, it's like I have two supervisors to get approval from. It's confusing and I also think it takes extra time."

A mid-level Family Focus participant also expressed confusion specifically regarding how the senior advisor role works and the impact of their recent portfolio changes on productivity.

More than half of the interviewees noted that some senior managers, particularly the Senior Vice President of Programs and Impact, have more teams to manage than others. They expressed concern about the heavier workload and the number of teams that person is required to manage under the new structure. The Senior Vice President of Programs and Impact manages four centers plus the Quality Assurance program while her colleagues are responsible for two or fewer centers or programs. Below is a comment from a mid-level Chicago Child Care Society participant: *"The Senior Vice President of Programs and Impact has the largest team and that's a bit much. Now I know she has been here over ten years but that is just too much. She pretty much oversees the organizations."*

> *Finding Three: Employees have deep organizational identification with their pre-merged organization; nevertheless, they recognize the value in the newly formed organization and solid synergies and alignment of missions with their merging partner.*

To address how well the extent to which employees identify with the newly merged organization, employees were asked to identify distinctive characteristics and values about their pre-merged organization and the newly merged organization compared to other nonprofits that do similar work. The findings reveal that employees identified strongly with their pre-merged organization but were also able to draw on favorable comparisons with the new organization regarding the clients they serve and the program and services they deliver. They also recognize synergies and alignment with their pre-merge organization and the new entity. The findings also reveal that leaders show efforts to ensure that employees feel

connected and can comfortably perform their work and services under the new entity by creating and engaging in a set of Guiding Principles that supports their continuous effort in successfully integrating the organizations. Principle 3 notes explicitly that: "Help all stakeholders see the many positive benefits of a merged organization that more holistically support the needs of under resourced families and children of Cook County."

When asked to share unique attributes about the new organization, a characteristic that frequently surfaced in the interviews is that Family Focus is "family-centered" and "family-oriented." A Family Focus pre-merger employee underscored the organization's effort of "family-centered" by noting:

"We look at the whole family as people who may need help instead of focusing on just the child. The child is in our face, but there is a reason why this child is here, and it is most definitely the parent, Guardian, neighbor, or cousin."

Other emerging patterns or consensus regarding distinctive qualities and characteristics that surfaced in the interviews regarding the new organization are that:

- "Family Focus cares about the clients they serve and the communities in which they live"

- "Family Focus provides a welcoming and friendly environment for its children and their families"

- "Family Focus is a one-stop-shop for services and the clients can find everything they need in one place"

- "Family Focus is a champion of children from birth to adulthood"

- "Family Focus is impacting more children and families; we have a larger footprint"

- "Family Focus has longevity of engagement, programs, and services in the community

Finding Four: There is a general feeling of inclusiveness and support from the organization; however, the COVID-19 pandemic has impacted the ability of the staff to engage with other staff members effectively.

The interviews reveal that the COVID-19 pandemic has been a huge impediment and obstacle for meaningful interaction with colleagues. When asked about the organization's efforts to make employees feel included, it was challenging for the employees to cite examples. However, they recognized the pandemic placed restrictions on their ability to plan in-person events that can create opportunities of inclusiveness such as staff meetings that involves the entire organization, birthday celebrations, holiday parties, promotions, etc. Four out of the ten interviewees cited surveys as a means of making employees feel included and having a "voice" as the merger continues to unfold. One employee noted that ***"With so much being virtual, I think that makes it a little difficult for people to really feel included. I think the surveys have been a way to achieve that."*** When reviewing the results of the Employee Engagement survey, the results indicated that 97.5 % agree or strongly agree that Family focus is dedicated to diversity and inclusion. While the COVID-19 pandemic may have impacted leaders' and managers ability to provide an environment that is inclusive, this has not had a significant negative impact on the employees' perceptions regarding inclusiveness in the workplace.

When asked managers/supervisors how they supported their team or direct reports through the merger, some expressed creating a safe space to air grievances. A manager at one

of the centers shared that *"We buy lunch for the staff, provide education workshops, and send Motivational Monday emails with quotes to get their week started. But I haven't seen much across the agency because of COVID."* Employees noted experience through the "virtual support" channels in the form of meetings with their supervisor. They are hoping that management will continue to provide grace to employees as they transition back into the workspace and continue to assimilate and settle into the new structure/organization. Surveys were mentioned as a means to support employees because they provide the opportunity to give feedback about the organization that could be used to improve conditions. However,

> *Finding Five: Employees recognized that not much has changed since the merger closing but have noticed a culture shift as the organizations fully integrate.*

based on the low participation response for the interviews, employees may have survey fatigue.

When asked interviewees to describe any changes in policies, processes, or the way the organization handles its business, employees' responses were mainly focused on the culture. Employees struggled with citing specific or significant changes in policies and procedures that could have an impact on productivity or delivery of services. Seeing how programs and services have yet to merge, employees may not have experienced any significant changes in the new environment. An employee from pre—merged Family Focus shared:

"We haven't really gone through any major changes at the site level yet. At my level, I've seen a lot of cross collaboration happening and some meetings where we've all been in together, but the programs are still running the same."

However, shifts" in the culture since the merger closing were noted by an employee who has been with Chicago Child Care Society for over thirty years. She described how the culture, over time, shifted between a relaxed, laid-back, "family-like" environment to more corporate as leaders transitioned in and out of the organization. She described the current (post-merger) atmosphere as more of a "social service" touch and with a corporate feel. The pre-merger partners' comments from the interviews are aligned in that employees shared that organization has a corporate feel. An employee from the pre-merger Family Focus shared:

"The culture is a little different. Family Focus legacy had a relaxed culture. For example, we had a human resources person that person did not communicate much. With the new leadership, there is more of a corporate feel."

While most of the interviewees expressed there is more of a corporate feel with the new entity, the survey results indicated that on *average, between 88 to 98% of the employees feel satisfied overall with their work environment* and noted some workplace culture strengths. Employees who responded to the survey, agreed with the following measures:

- "I am often involved in my work that the day goes by very quickly"

- "I am determined to give my best effort at work each day"

- "When I am working, I am completely involved in my job duties"

- "Staff always keeps going when the going gets tough"

- "Family Focus is dedicated to diversity and inclusion"

- "Family Focus positively impacts peoples' lives"

Recommendation 1: Leaders can ensure there are more introduction of programs and services and increase social interaction between individuals and working groups to foster collaboration and camaraderie.

As Family Focus continues to implement the "return to work" plan, leadership should develop more meaningful opportunities for in-person activities and collaboration across programs and services of each pre-merger organization. Employees have expressed a strong interest in learning about the partnering organizations' programs and services. They have also shared that the organization has grown so much that it is challenging to know employees. Currently, a considerable percentage of the staff are still working, meeting, and collaborating virtually, which comes with challenges. Still, as COVID restrictions continue to be lifted, there is an opportunity to schedule in-person work activities. As the literature review states, findings from a study by Rouzies and Colman (2012) found that social interactions (including collaborative work activities) between pre-merger entities foster organizational identification. It is recommended that visits to the headquarters and 12 centers occur as quickly and safely as possible. The in-person activities allow the employees to meet each other and learn about roles and responsibilities and what programs and services are provided at the centers/sites.

Recommendation 2: Roles and job responsibilities should be clarified to reduce any uncertainties that could lead to feelings of job insecurity.

Managers and leaders should spend time carefully clarifying, crafting, and redefining roles and ensure that they feed up to the organization's mission and vision/strategic direction. These activities and engagements of roles and responsibilities clarification will help employees understand what is expected of them regarding specific duties and tasks and how that contributes to the bottom line. It also allows employees the opportunity to appreciate and understand the collective value that can be created and leveraged with other employees or teamwork. Van Dick et al. (2006) study offers recommendations that can help leaders sustain organizational identification and reduce employees' feelings of uncertainty about their roles and the responsibilities of others in their work group/streams and any possible feelings of job insecurities. First, leaders can be intentional with ensuring continuity in work routines, teams, and the organization's communication channels (van Dick et al., 2006). Leaders can also build up post-merger identification by practicing genuine, clear communication about critical issues such as the potential for future job loss and job role modifications (van Dick et al., 2006). Employees expressed concerned about knowing when and how programs and services will be integrated since this could modify job roles and responsibilities. To help alleviate uncertainty with the timing of when this will occur, leaders should update the FAQ, when at all possible, as new critical information becomes available. Lastly, during times of post-merger hardship and losses of continuity in company culture, policy and practices, leaders should provide emotional support and care for the needs of employees as the organization is going through significant

changes (van Dick et al., 2006). I also recommend that the Family Focus create a value statement to represent the new organization's beliefs and core values. The value statement can build and strengthen the brand identity so that internal and external stakeholders understand the focus of the work and respect it. It can also help strengthen employees' organizational identification which is an important factor impacting post-merger integration success. Now that the two organizations have merged, it is a good time for leadership to fully engage a consultant in developing a new culture that embodies the values of each organization and fosters a climate where employees can feel supported, reach their full potential, and thrive. A strong, thriving, and healthy culture helps the organization unleash potential and achieve critical goals, including those that support a sustainable environment.

Recommendation 3: Continue to celebrate the staff accomplishments and team victories. Ensure that mission and visions encapsulate the qualities the values each organization brings.

There are many ways to celebrate even virtually. A merger can take a psychological and mental toll on employees. Employees should recharge and reinvigorate, and they should be engaged, recognized, and celebrated. The study by Rouzies and Colman (2012) found that other factors such as social interactions (including collaborative work activities with deadlines assigned by managers) between merging partners, can foster organizational identification. Positive social interactions and work group collaboration builds morale, confidence and can increase motivation. Celebrating achievements also help attract and retain highly qualified candidates and can improves the environment and create a positive, supportive culture.

> **Recommendation 4: As Family Focus continues to implement the "return to work" plan from COVID-19 restrictions, leadership should develop more meaningful opportunities for in-person activities and collaboration across programs and services of each pre-merger organization.**

Meaningful in-person activities can help fosters collegiality amongst employees and encourage a collaborative mindset. This will become increasingly important as the workstream managers and leaders continue to perform integration work. I want to again, flag the Rouzies and Colman (2012) study findings regarding social interactions and collaborative work activities that can strengthen organization identification which can lead to positive outcomes outlined in the framework adopted from Giessner et al., (2011) study (job satisfaction, well-being, cooperation, high performance, low turnover, and organizational citizenship behavior).

> **Recommendation 5: Hire a consultant to help develop culture that embodies the values of each organization and fosters a climate where employees feel supported, reach their full potential, and thrive.**

As leaders look to create a new culture that embodies characteristics and values of both organizations, they should revisit the results of the workplace culture strengths under the engagement survey. These results regarding workplace culture provided insight into how employees are doing in the new environment and about attitudes towards their work and the new organization. A better understanding of the current workplace culture can help leaders manage the work climate and take inventory of what has happened organically as a result of the merger. Leaders can build on existing strengths that can help catapult the efforts of

creating a new culture. For example, a survey participant commented that "Family Focus is dedicated to diversity and inclusion." Leaders can find opportunity in building on their existing diversity, equity, and inclusive framework.

> *Recommendation 6: As Family Focus continues to move toward fully integrating, it is vital to stay on the trajectory of achieving a merger "of equals" (although very challenging to achieve) to build trust and faith in the employees.*

Before the merger, it is important to note that it was difficult to truly ascertain whether Chicago Child Care Society is a dominant partner and Family Focus is the dominant partner (or vice versa).   A study by Hinsley (2017) notes that the less dominant organization (or lower status organization) often loses its name, experiences more significant loss of its employees, and has its practices superseded feels and uncertainty about the future of its pre-merged status. Chicago Child Care Society did not gain its name in the deal; yet it kept using its EIN number and original nonprofit status because of its special charter designation granted by the state. Keeping in the spirit of "merging of equals," Chicago Child Care Society gave up its name. Chicago Child Care Society came to the table with a smaller budget than Family Focus; nonetheless, they bring a sizable endowment to the new entity. Family Focus benefit greatly from their efforts in ensuring there is merger of equals. The new logo design in an example of the leaders ensuring there is equal representation from Chicago Child Care Society and Family Focus. This study did not have an opportunity to get feedback on the new logo and website due to the interviews being completed prior to branding and marketing redesign. Another demonstration of the leaders' effort to create a merger of equals is that the workstream groups

have at least one co-chair from each partner organization which means characteristics, ideas, values, policy procedure and strategies, from both organizations will likely transition, in some form, to the new the new entity.

CONCLUSION

Like many companies that are interested in growing their business, creating value, and maximizing efficiencies, leaders from Chicago Child Care Society and Family Focus sought an opportunity to merge together to create one powerful entity. As good stewards of the organization, they carefully craft a bold plan with strategies aimed to navigate complexities and challenges that are inherent in M&As. Now in its post-merger integration phase, Family Focus, the new entity, hopes to successfully integrate while ensuring the staff is highly productive, actively engaged and fully committed to the new organization. Therefore, the purpose of this study focused on the human capital side of the merger by understanding how employees are doing in the post-integration phase. My investigation led me to several key findings that helped me better understand what employees were experiencing as a result of the merger. This study offers recommendations to Family Focus' leadership regarding critical elements of policies and practices that will help achieve a successful integration and create or foster an improved culture in the new environment.

Findings from this research revealed employees' desire for clarity in terms of how each organization will fit into the new structure and the uncertainty they are feeling about new roles, responsibilities, and the reporting structure. The findings also reveal a path to victory in terms of strengthening employees' organizational identification with the new entity. Although

they have deep organizational identification with their pre-merger organization, employees recognize the strong synergies, alignment in missions and the value and benefits as one powerful unit.

The study's limitation to the findings is that the results of in-depth qualitative interviews do not represent a critical mass of the Family Focus employees. There are at least 400 people employed with Family Focus and only 20 were interested in participating in the interviews. Ten, completed the interview which represents a very small portion of respondents. Therefore, I had to rely on the annual engagement survey that was administered after the organizations officially merged. I also relied on the literature review to provide insight into the human reactions (such as fear, uncertainty, confusion, and potential culture clashes) of employees when major change occurs in an organization such as a merger or acquisition. The research on Social Identity Theory provided insight into employees' mental state in a merger situation and the approach leaders can take to better understand the psychological impact and negative shifts in psychological behavior. Organizational identification is a key element in achieving success in the post-integration phase. The more leaders know about how to strengthen organizational identification the better leaders can achieve positive outcomes. There is so much research and literature on mergers and organization and how organizational identification plays a critical role in merger success.

As a result of this study, I believe Family Focus will share this report with the workstream leads of the Integration Merger Organization Task Force so that they may have insight into how to lead and manage employees through this process of major change.

Understanding the landmines that might trigger negative physiological behavioral shifts that would impede productivity would be beneficial to the integration progress. The recommendations offered can help guide senior leaders and managers as they work to finalize new processes and procedures. The Seo and Hill (2005) study, which outlines sources of problems that can emerge at different stages of the M&A integration, including employees' psychological and behavioral issues is an excellent source for leaders. The table contains underlying theories, including Social Identity Theory, and the sources of problems associated with such theory. Seo and Hill (2005) describes predicted outcomes to these sources of problems and flag potential mitigating prescriptive measures and recommendations.

Although there is widespread sentiment in the research that infers a merger of equal is hard to achieve, again, Family Focus benefit greatly from their efforts in **trivial** *t*o make the situation and outcomes as fair and equitable as possible. Leaders' efforts to create a merger of equals has resulted in some aspects of continuity from its premerger organizations. For example, although the logo is new, designs features, colors incorporates both Chicago Child Care Society and Family Focus. Also, the workstream groups have at least one co-chair from each partner organization which means characteristics, ideas, values, policy procedure and strategies, will likely transition to the new organization. And lastly, while pre-merger Family Focus employees experienced the most changes regarding the employees' benefits package, it was redesigned to offer an attractive benefit for all employee in the newly merged organization. As gleamed from van Knippenberg's (2002) research, the notion of a "sense of continuity" explains how organizational identification can be strong or weak depending on how well there is continuity from their pre-merged organization to the new organization. Family

Focus' efforts in taking what's salient and valuable in both organizations and making it part of

the new entity puts them on the path to ensuring that organizational identification gets

stronger will help achieve some of the critical outcomes (job satisfaction, well-being,

cooperation, etc.) as described in the Giessner et al., (2011) study.

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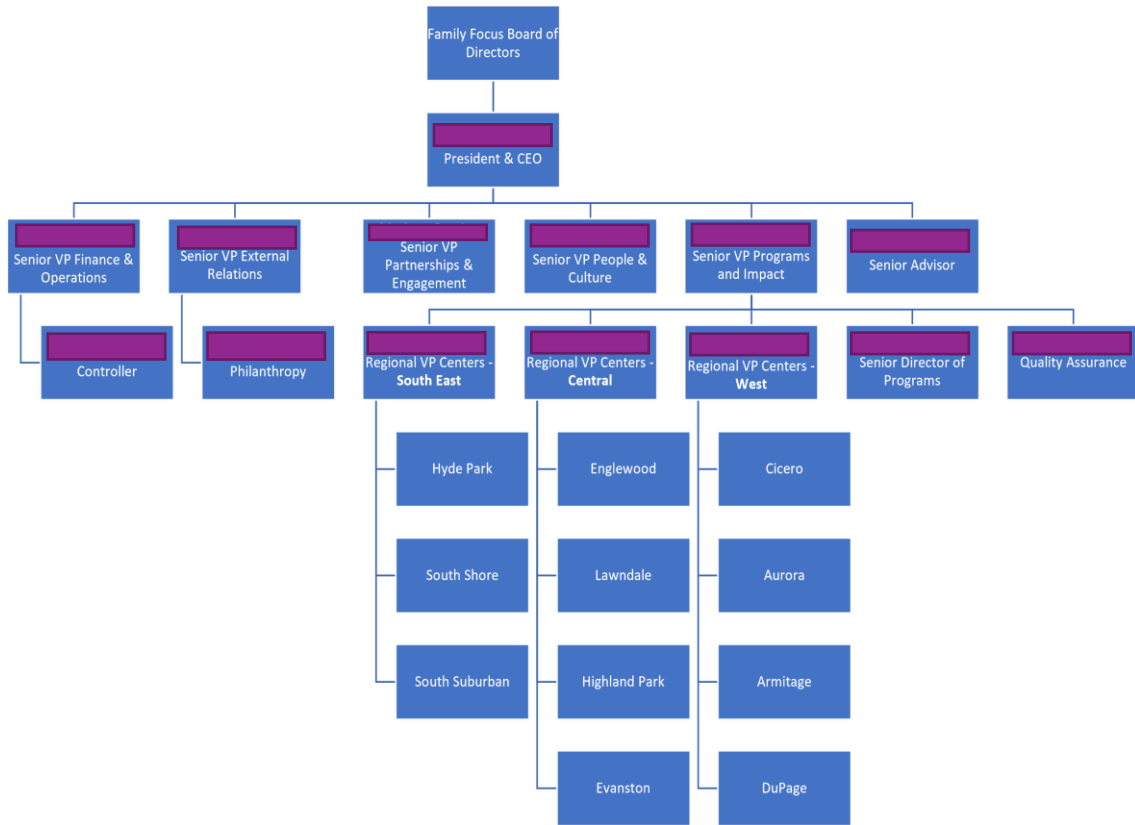
Frequently Asked Questions

1. Why are we merging?

Family Focus and Chicago Child Care Society have joined with our shared mission to provide early childhood education, youth development and family support services in under-resourced communities across northeast Illinois. The newly merged Family Focus combines the strengths and expertise of both agencies to offer a comprehensive continuum of services for the entire family. With a larger geographic footprint, we will expand our services to reach more families, have a bigger voice to influence public policies at every level of government, and to reach more people who care about this work and supporting our neighbors (like you!).

2. Will my benefits change?

Benefits are always under review so that we can attract the best talent while keeping an eye on cost. CHICAGO CHILD CARE SOCIETY and FAMILY FOCUS have worked very hard to offer an even more attractive benefit package for our combined workforce.

New Family Focus

Benefit/Policy	Current CCCS	Current FF	New
Vacation	<12 months 10 Days prorated 12- < 24 months 10 Days 24 - < 48 months 15 Days 48+ months 22 Days	1-12 months 10 Days 13-36 months 15 Days 37+ months 20 Days Director and Above 20 Days	1-12 months 10 Days 13-36 months 15 Days 37+ months 20 Days Director & Above 20 Days
Vacation Carry-Over	None	10 Days	10 Days
Sick	12 Days	12 Days	Same
Sick Carry-Over	60 Days	6 Weeks (30 Days)	12 Weeks (60 Days)
Personal	3 Days, included in Sick Days	4 Days	2 Days
Personal Carry-Over	None	None	None
Holidays		11 Days	13 Days
Jury Duty	5 Days	Unlimited	Unlimited
Bereavement	3 Days	3 Days	3 Days
Paid Lunch	None	30 Minutes	30 Minutes
Pay Cycle	Bi-Weekly	Twice per Month	Bi-Weekly
Pay Date	Friday following pay period	Last day of pay period	Friday following pay period
Short Term Disability	None	Company Paid	Offered
Long Term Disability	Company Paid	Offered	Company Paid
Pet Insurance	Offered	None	Offered
Time Keeping, hourly	Time Punch	Time Sheets	Time Punch
Retirement	401(k)	403(b)	401(k)
Retirement Eligibility	90 Days	60 Days	90 Days
Match	1% of contributions	4% of contributions	1% of contributions
		Foll, 12 months	Foll, 90 days
Safe Harbor Contrib.	4%	None	4%
	90 Days	N/A	90 Days
		NOTE 1: Vacation balance will be paid out as of December 31, 2020 and not carry over to New Family Focus. NOTE 2: Service Years at Family Focus will carry over to New Family Focus for purposes of "Start Date" and benefit eligibility.	

3. **Will my job change?**

For the most part, your job will be the same as it was before the merger. There will be some organizational realignment as we combine similar programs and departments. Anyone with a job change will be notified in December 2020. When two successful companies come together, the result is a combined organization that creates new and exciting opportunities – this combination is about program quality, infrastructure support, expansion, and success for the future. As can be expected in a transaction of this type, there may be some overlap across functions between the two companies. While we anticipate opportunities for cost savings may be realized in the long-term, the primary motivation for this merger is to continue to expand not to find immediate efficiencies or cost savings.

4. **Will my location change?**

Most employees will continue to work at their current location. Administrative staff may work out of a different location in the future as we combine department staff Focus.

5. **Will I be able to apply for a position at one of the Family Focus locations?**

One of the benefits of a merger is offering new job opportunities at more locations. Your development is a top priority. It is expected that an employee will work in their current position at least one year prior to changing positions or departments.

6. Will my hours change?

Schedules are not expected to change unless there is a business necessity. If your schedule needs to be adjusted, you will be notified at least two weeks in advance.

7. **Will my pay change?**

It is not anticipated that pay will change as a result of the merger. Most program positions are budgeted well in advance and are locked in for the program year.

8. **Who will I report to?**

Most employees will report to the same manager after the merger. If any changes in reporting occurs, employees will be notified in December.

9. **Will I have the same teammates?**

Yes, though you may have even more team members if a program is combined with a similar program at Family Focus.

10. **Will our culture change?**

The culture at CHICAGO CHILD CARE SOCIETY and Family Focus are very similar. In fact, culture alignment was seen as critical when deciding whether or not to merge with family Focus.

11. Will our work processes change?

We are always looking for better ways to do our work. This will not change. We may find that one or more of our processes can be improved and if so, may adopt those new processes.

12. Will there be a severance package if I lose my job?

While we do not anticipate job losses as a result of the merger, any employee who loses their job as a result of the merger will be offered a severance package based on our severance policy. Voluntary resignations will not be eligible for a severance package.

13. Will any locations close because of the merger?

We do not anticipate any office closures as a result of the merger.

14. How will program participants be notified about the merger?

A communication plan has been developed for all of our stakeholders, including program participants. They will be notified about the merger through direct communication via e-mail, newsletters, and community notices via various media outlets.

15. What do I say if someone asks me about the merger?

Feel free to speak about the merger, but also encourage them to contact our Development Department at info@cccsociety.org or steve.majsak@family-focus.org.

16. What will the name of our organization be?

The new organization name will be *Family Focus*.

17. How should we answer the phone and when should this start?

We will begin using our new name, Family Focus, on January 1, 2021.

18. How can I learn more about Family Focus?

Family Focus has a comprehensive web site at Family-Focus.org. Chicago Child Care Society's web site is www.CCCSociety.org. We will be combining web sites as part of the merger integration process.

19. How long will the integration take?

Some of the integration is already happening, and additional work will happen between now and the end of the calendar year. Program transfer and consolidation is dependent on funder contracts and program years, which vary from grant to grant. It is anticipated that all the integration will be completed by the end of 2021.

20. **Who should we contact if we have questions?**

Most of your questions should be addressed in this document, which will be updated regularly. We will also send out information as it becomes available. If you still have questions, start with asking your manager. If they don't know the answer, feel free to contact anyone in senior leadership.

21. **What should I do if someone from the media calls to ask about the merger?**

We would like to have all media outlets be referred to Development for a formal response. Ask them to contact Development at info@cccsociety.org.

22. **What policies and procedures will change?**

Most of our policies and procedures will remain the same, with the exception of changes in benefits mentioned above. A new, combined *HR Policy & Procedure Manual* has been drafted, with more comprehensive language for most of our current policies. The policies are not different, just more clarified. Any exceptions will be communicated to employees in December.

23. **How many employees does Family Focus have?**

Family Focus has approximately 195 full time employees and hires approximately 80 seasonal staff. CHICAGO CHILD CARE SOCIETY has approximately 120 employees.

24. **Who will serve on the executive leadership team?**

The combination will be a merger of equals. Dara Munson will be the CEO. The integration team will consist of members of both organization's current senior team members. The merged organization's board of directors will consist of members of the current board. Each organization will place an equal number of members on the new Board of Directors. The first Board Chair will come from Family Focus' current Board of Directors.

25. **Where will the Corporate Headquarters be located?**

The main headquarters for Family Focus will be at 5467 S. University Ave, Chicago, IL, 60615 until a new permanent headquarters can be identified that consolidates the management teams into one location. Until the permanent headquarters is established, both the University Avenue and Peoria Street offices will be maintained, and the administrative teams will be

reorganized and relocated based upon the position and function of the staff member. This is only a temporary solution until a permanent headquarters answer can be developed to consolidate the teams into an appropriate location. We anticipate this will take twelve months. The new headquarters will reflect the values of the organization and be located close to where the families and communities we serve reside.

26. **How big will the new organization be after the merger?**

Just over 375 staff members (FT and PT), $25M operating budget, $30M in total assets, 12 centers serving metropolitan Chicago. This is an opportunity to bring together two leading organizations in the early childhood education, youth development and family support fields to create a thought-leading organization with the ability to create more substantial impact regionally and at the state level. Additionally, the combined organization's leadership team will draw on the talent from both FAMILY FOCUS and CHICAGO CHILD CARE SOCIETY and the board representation of the combined organization will be broadly equal.

27. **As an employee of the current Family Focus, how will I transition to the new Family Focus?**

The employee data from the Family Focus ADP platform will be uploaded into the Paycor system, creating a New Hire profile for all current Family Focus employees. Your current "Start Date" will be used to determine your benefit eligibility and seniority level. Documents that need to be reviewed and acknowledged will be sent electronically to the e-mail address we have on file in the form of an "onboarding" process. Should you need to submit to a new background check, information will be sent to you with a timeline for processing. All current Family Focus employees will be provided with an "offer letter" that will confirm your position, department, and rate of pay with the new Family Focus. The offer letter will need to be signed, dated, and stored in your personnel file.

2021 Employee Engagement Survey

About the Survey

This survey was modified from survey questions provided by the Legacy Chicago Child Care Society on several typical areas of employee engagement. The survey was published in English only as an online form distributed by email and was open from 4/14/21 until noon on 4/26/21. The survey included 45 questions (See Appendix A).

About the Respondents

201 staff responded out of 400 invited. It is estimated that on average, 87% of full-time staff from each center/office location responded, although up to 10% of the responses may have been from part time staff. Based on the response rate, we can be confident that if we had had a 100% response rate, that the true percentage of responses would have been +/- 5% of what is reported here.

Respondent race/ethnicity identities were reported in proportion to the full population.

Respondent gender identities were reported as 6% Male, 92% Female, and 2% Prefer not to Answer.

How to Read this Report

All ratings are given as a percentage of those who responded to the question. The rating scale for the 2021 survey included:

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Does Not Apply (only on questions where this applied)

The rating scale for the 2020 survey included "Neither Agree nor Disagree." This "forced" a decision to the positive or negative side and made the results of the 2021 survey difficult to compare with the 2020 survey. When comparing the "Disagree" and "Strongly Disagree" responses for both surveys, the results indicate that in most cases, the "Neither Agree nor Disagree" responses from the 2020 survey skewed positively towards "Agree" and "Strongly Agree" in the 2021 survey (Please see Appendix B).

Work Engagement

On average, between 85 – 95% of all staff are satisfied overall with their feelings of engagement at work.

They were most likely to strongly agree that they are often so involved in their work that the day goes by very quickly.

They were most likely to strongly disagree that they have the equipment and technology they need to do their job well.

Another point that some staff disagreed about was whether Family Focus staff willingly accept change. There were no significant differences by gender, race, job role, or program area.

Write-in responses highlighted the need for more support with funds, technology, and clearly defined and communicated expectations. In this category, staff wrote in about feeling overwhelmed and harmed by coworkers or supervisors who do not appreciate or understand the labor that goes into their job role.

"It would be great if Family Focus could support us with our education such as College expenses. I believe this could give us motivation to continue education and make us more prepared for our roles and our service to the community."

"In my case, it was part Family Focus and part my effort. In 2015, I graduated with my Bachelor's [degree] in social work. I received great support from Family Focus allowing me to make arrangements on my job schedule. That way I was able to continue my academic education."

"When I was offered this position, it was with no prior supervisor experience. I am learning how to run my program from the funders, but not how to be a supervisor. I am learning as I go. I would like more general leadership training."

"While we don't have formal programs, we should be able to be reimbursed for membership in organizations related to our fields that offer free training for members. Perhaps manager level and above.

"In regards to accepting change, each individual process[es] change in different ways. I think it's wise to invest on introducing the value of change before implementing the actual change."

"It would be nice to have fun things to look forward to when coming into work (Not just the same routine). It would also be nice to get positive comments about what we are doing rather than only what we are doing wrong."

	Agree or Strongly Agree	
	2021	**2020***
There are clear goals and expectations for my work.	97.6%	80.0%
I am inspired to meet my goals at work.	93.5%	72.3%
I feel fully engaged in my work.	93.5%	78.5%
I get excited about going to work.	88.6%	49.2%
I am often so involved in my work that the day goes by very quickly.	95.5%	75.4%
I am determined to give my best effort at work each day.	99.0%	84.6%
When at work, I am completely focused on my job duties.	95.5%	84.6%
Family Focus staff adapt quickly to difficult situations.	86.1%	46.2%
Family Focus staff always keep going when the going gets tough.	96.5%	61.5%
Family Focus staff are skilled at anticipating future challenges and opportunities.	86.1%	46.2%
Family Focus staff take the initiative to help each other when the need arises.	91.0%	66.2%
Family Focus staff are willing to take on new tasks as needed.	91.5%	56.9%
Family Focus staff willingly accept change.	82.6%	35.4%
I have the equipment and technology I need to do my job well.	76.1%	63.1%
I understand the way my program or department sets its goals and objectives.	91.6%	66.2%

Legend: ■ Strongly Agree ■ Agree ■ Disagree ■ Strongly Disagree

* 2020 Survey results include Legacy CCCS Staff only. The 2020 rating scale included a "Neither Agree nor Disagree" option that was eliminated in the 2021 scale. This move forced a positive or negative choice on the 2021 survey, skewing comparable results.

3

Compensation

Only about 50-60% of staff feel satisfied with their overall compensation.

There were no significant differences by race or gender.

Staff who were Directors were somewhat more likely to agree that they were satisfied with their compensation. No Executives disagreed. There was a perfect 50/50 split for people who were managers or direct service staff.
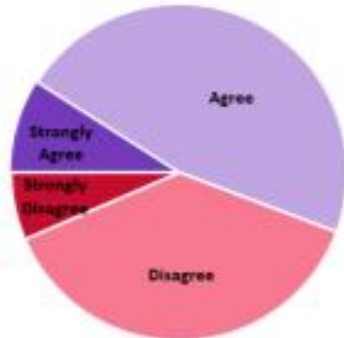
People who worked in Youth Development were most likely to disagree that they were satisfied with their pay (65%).

21 of the 95 people (22%) who were dissatisfied with their compensation conceded that it was fair relative to the market. These people were mostly direct service workers in the Early Childhood program area (i.e., likely to be people who understand that the market rate for their skills is lower than it should be due to historic inequity and ongoing devaluation of the services provided by women and especially by women of color).

9 of the 106 people (8%) who are satisfied with their compensation also noted that they do not believe it is fair relative to the market. These people were mostly administrators (i.e., likely to be people who understand that their skills and abilities would garner higher wages on the open market with a private corporation or private entity, but may be happy with their compensation given the understanding that they are working in the nonprofit sector).

85% of people selected the same answer for both questions related to compensation – if you were dissatisfied with your pay, you also believed it was unfair or uncompetitive.

	Agree or Strongly Agree	
	2021	**2020***
I am satisfied with my overall pay & compensation.	52.8%	35.9%
I am paid fairly compared to other similar positions in this area.	58.8%	31.3%

Legend: Strongly Agree, Agree, Disagree, Strongly Disagree

"I believe that the agency should focus on raising all of the direct service staff salaries so that the salaries are competitive with other agencies in Chicago."

"I am very grateful for the opportunity/flexibility Family Focus allows me to work from home."

"I would like to see annual salary increases....when responsibilities change within my role."

"Healthcare costs still take a chunk of my paycheck and it was not affordable to add my husband to my plan."

"Taking time off is challenging due to workloads and demands."

4

Benefits

On average, 83-93% of staff feel satisfied with their benefits.

They were most likely to **strongly agree with being satisfied with flexible scheduling and remote work options.**

They were most likely to **strongly disagree with being satisfied with the amount of paid leave offered.**

About 10% of respondents were excluded because they selected "does not apply." We may infer from this that about 10% of respondents were part time staff, but respondents may have also selected this option if they are unaware that they are eligible for the benefit listed, or if they have no opinion about the benefit listed.

Write-in responses in this category helped identify the specific nature of staff's dissatisfaction with their benefits and compensation. Some staff felt that they were not being treated fairly and that their colleagues were being paid at different rates than they were for doing the same work, or that they were being asked to do more work or take on more projects without being given additional pay. About 11 people wrote in with their personal grievances related to the health insurance benefits offered, the process of signing up for benefits, or the PTO policies and how their supervisors implemented those policies. A few comments noted that the health insurance benefits were not affordable for them and their families on their current salaries.

	Legend					Agree or Strongly Agree	
	■ Strongly Agree	■ Agree	▦ Disagree	■ Strongly Disagree	■ Does Not Apply	2021	2020*
I am satisfied with my total benefits package.						84.6%	66.2%
I am satisfied with the healthcare related benefits offered at Family Focus.						72.1%	64.6%
I am satisfied with the amount of paid leave offered by Family Focus.						79.1%	49.2%
I am satisfied with the Retirement plan offered by Family Focus.						84.6%	67.7%
I am satisfied with the workplace flexibility (scheduling/remote work/etc) offered by Family Focus.						92.1%	66.2%

NOTE: These questions, with the exception of retirement, only apply to Full-Time (greater than 30 hours per week) employees.

> "It would take over half my paycheck to include my family on medical coverage and my salary is just enough to not qualify for Medicaid."
>
> "I strongly disagree with the fact that when we take time off work we are not given the option to be off without pay if we choose. We are told that we have to exhaust all out time. And we are forced to use our vacation or personal time for days scheduled off by the company instead of using that time as we see fit."

Work Relationships

On average, between 85-95% of staff feel satisfied overall with their work relationships.
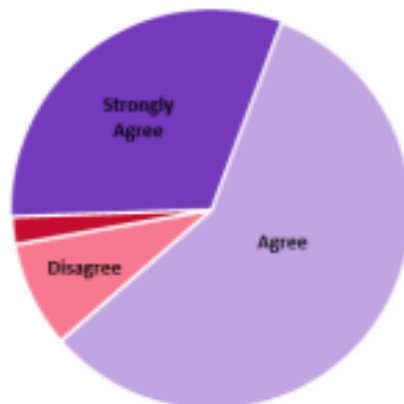
They were most likely to strongly agree that they had a positive working relationship with their supervisor and coworkers.

They were most likely to strongly disagree that Executives and Directors trust Managers & Direct Service Staff or that Communication between Executives and Staff is good.

There were no significant differences by gender.

Staff who were Directors were somewhat more likely to disagree that communication is good

Most write-in comments in this section addressed specific issues where follow-up may be required by HR.

"I am blessed to say that I feel very good working for Family Focus."

I don't feel like [leadership] have a relationship [with] staff at all. I also feel that the [leadership] has certain rules for certain people."

"Communication needs to be strengthened."

"I have heard from other coworkers that some employee relationships are not going well."

"In my opinion, the mutual respect among coworkers and family-friendly atmosphere makes FF a great place to work."

"Trust needs to be demonstrated by program managers. It would be nice to be at the table or hold discussions about programming to hear everyone's input. Right now, it doesn't seem like a group effort...more like [you are] told what to do."

"I enjoy working with my team and working with all my staff at the center."

"Some program managers and supervisors do not communicate in the correct tone. Some managers never respond to emails [and] yell and scream."

■ Strongly Agree ■ Agree ■ Disagree ■ Strongly Disagree

		2021	2020*
Communication between Executives (the President, Sr. Vice Presidents, Regional VPs) and staff is good at...		81.1%	44.6%
I am able to make decisions that impact my work.		85.6%	56.9%
Management within Family Focus recognizes strong job performance.		83.6%	53.1%
My supervisor and I have a good working relationship.		95.0%	76.9%
My coworkers and I have a good working relationship.		96.5%	84.6%
Executives & Directors trust the Managers & Direct Service Staff		87.1%	27.7%
Managers & Direct Service Staff trust the Executives & Directors		85.6%	27.7%
Family Focus staff treat one another with respect.		92.5%	63.1%
I have at least one friend at work.		93.0%	76.9%
Family Focus practices ethical treatment for all employees.		91.0%	64.6%

On average, between 88-98% of staff feel satisfied overall with their work environment.

They were most likely to **strongly agree that Family Focus positively impacts peoples' lives.**

They were most likely to **strongly disagree that they are satisfied with the culture of their workplace.**

Staff also **disagreed about whether they were satisfied with their job security**. There were no significant differences by gender.

Write-in responses in this category were diverse, but the top themes were Safety & Security at the center, wanting more clarity, intentionality, or training around the Anti-racism component of the new mission statement, and being worried about what will happen when Family Focus reopens to more of the public and resumes more in-person services.

Family Focus Workplace Culture Strengths

Nearly everyone who responded to the survey **agreed** with these measures:

- I am often so involved in my work that the day goes by very quickly.
- I am determined to give my best effort at work each day
- When at work, I am completely focused on my job duties
- Staff always keep going when the going gets tough
- Family Focus is dedicated to diversity and inclusion
- Family Focus positively impacts peoples' lives

"I have to say that the women's bathroom on the 3rd floor in the Aurora Center are bad."

"My staff and I are very concerned about the violence and overall safety in the communities we service."
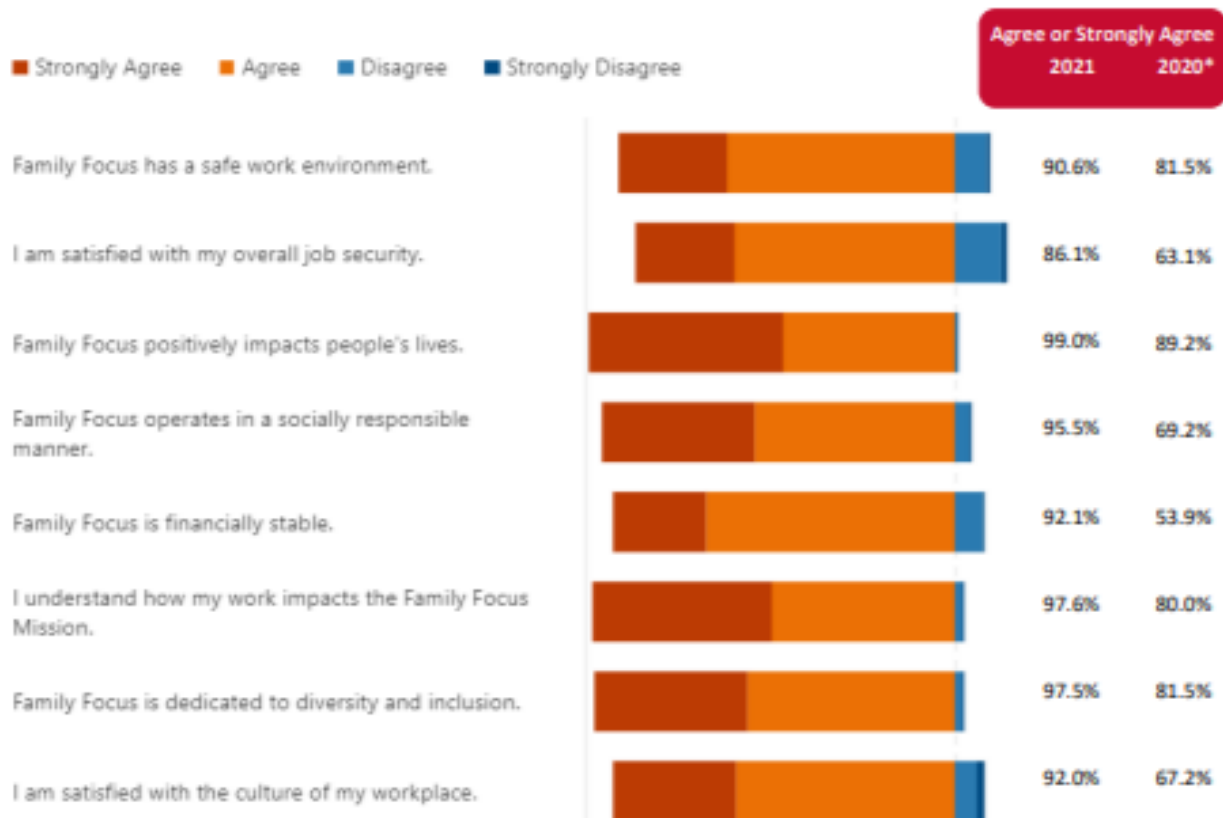
"The work environment is great, but work equipment, use of printer, and internet with updated computers and a dedicated work space needs to be addressed."

"Our workplace is safe and respectful."

"Generally feel safe. However, security is definitely needed for the safety of the staff and parents."

"I feel there needs to be more safety protocols in place for staff as the surrounding communities seem to be more violent."

■ Strongly Agree   ■ Agree   ■ Disagree   ■ Strongly Disagree

Statement	2021	2020*
Family Focus has a safe work environment.	90.6%	81.5%
I am satisfied with my overall job security.	86.1%	63.1%
Family Focus positively impacts people's lives.	99.0%	89.2%
Family Focus operates in a socially responsible manner.	95.5%	69.2%
Family Focus is financially stable.	92.1%	53.9%
I understand how my work impacts the Family Focus Mission.	97.6%	80.0%
Family Focus is dedicated to diversity and inclusion.	97.5%	81.5%
I am satisfied with the culture of my workplace.	92.0%	67.2%

Key Takeaways

- Family Focus should take every opportunity to celebrate the strength and resilience of staff to recognize their hard work and commitment to delivering high quality programs and services that impact children and families.

- Family Focus should advocate for better pay across the board, particularly for positions that have traditionally been undervalued.

- Family Focus should acknowledge ongoing communication challenges.

- Family Focus should commit to providing all necessary equipment, space and technology to efficiently produce the work product that is required from an industry-leading organization.

- Family Focus should prioritize management/supervisor training to develop leadership skills and ensure fair treatment and respectful communication for all staff.

- Family Focus should develop annual objectives that support staff development and when possible, financially support this development.

- Family Focus should plan to offer training and support for the anti-racism component of the mission statement.

2021 Survey Questions

1. I am satisfied with my opportunities for professional growth.
2. I am pleased with the career advancement opportunities available to me.
3. My organization is dedicated to my professional development.
4. I am satisfied with the job-related training my organization offers.
5. I am satisfied that I have the opportunity to apply my talents and expertise.
6. I am satisfied with the investment my organization makes in training and education.
7. I receive frequent feedback about how I am doing my job.
8. I am inspired to meet my goals at work.
9. I feel fully engaged in my work.
10. I get excited about going to work.
11. I am often so involved in my work that the day goes by very quickly.
12. I am determined to give my best effort at work each day.
13. When at work, I am completely focused on my job duties.
14. In my organization, employees adapt quickly to difficult situations.
15. Employees here always keep going when the going gets tough.
16. Employees proactively identify future challenges and opportunities.
17. Employees in my organization take the initiative to help other employees when the need arises.
18. Employees here are willing to take on new tasks as needed.
19. Employees in my organization willingly accept change.
20. I have the equipment and technology I need to do my job well.
21. I understand the way my program or department sets its goals and objectives.
22. I am satisfied with my overall compensation
23. I am compensated fairly relative to my local market.
24. Communication between senior leaders (Chief Program Officer, Chief People Officer, Chief Development Officer, Chief Executive Officer) and employees is good in my organization.
25. I am able to make decisions that impact my work.
26. Management within my organization recognizes strong job performance.
27. My supervisor and I have a good working relationship.
28. My coworkers and I have a good working relationship.
29. Senior management and employees trust each other.
30. Employees treat each other with respect.
31. I have at least one friend at work.
32. My organization practices ethical treatment for all employees.
33. I am satisfied with my total benefits package.
34. I am satisfied with the healthcare-related benefits offered by my organization.
35. I am satisfied with the amount of paid leave offered by my organization.
36. I am satisfied with the retirement plan offered by my organization.
37. I am satisfied with the workplace flexibility offered by my organization.
38. My organization has a safe work environment.
39. I am satisfied with my overall job security.
40. My organization's work positively impacts people's lives.
41. My organization operates in a socially responsible manner.
42. My organization's fiscal well-being is stable.
43. I understand how my work impacts the organization's business goals.
44. My organization is dedicated to diversity and inclusiveness.
45. I am satisfied with the culture of my workplace.

2020 vs 2021 Disagree or Strongly Disagree Difference