EMOTIONAL INTELLIGENCE AS A FACILITATOR OF STRESS MANAGEMENT IN MERGER LEADERS

By

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Dissertation submitted to the Faculty

Division of Graduate Studies in Leadership and the

Graduate School

In partial fulfillment of the requirements for the degree of

Doctor of Philosophy

Organizational Leadership

Indiana Wesleyan University

December 2019

The Dissertation Committee for Tajuana L. Washington-Ryder certifies that this is the approved version of the following dissertation:

EMOTIONAL INTELLIGENCE AS A FACILITATOR OF STRESS MANAGEMENT IN MERGER LEADERS

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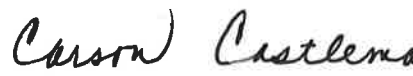

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Abstract

This mixed-methods study examined emotional intelligence (EI) as a factor of a leader's ability to adapt and tolerate stress while leading day-to-day activity of an organizational merger. Continuous exposure to merger activity can trigger feelings and actions that create personal and social challenges for leaders; thus, impacting merger performance. Although a merger may be stressful for all entities involved, leaders expressed different perceptions of merger stress and adaptability based on their identification with the larger or smaller merger partner. Without assessment and awareness of a leader's psychological health, leaders may succumb to the pressures of the merger and the new organization will be at risk of merger failure. The Emotional Quotient Inventory (EQ-i 2.0) self-assessment was administered followed by semi-structured interviews to better understand the relationship between emotional intelligence scores and narratives of the merger experience. Regression analysis reported a statistically significant relationship between the total EI score and the stress management score which indicated that a higher overall EI score was predictive of a better stress management score. Correlation testing showed no relationship between interview responses about adaptability to merger stressors and scores reported for stress tolerance and flexibility on the EI assessment. Emotional intelligence scores in stress tolerance and flexibility did not consistently reflect the leaders' description of their actual merger experience. Additionally, there was no statistical significance in EI scores reported for leaders from the larger blood center in relation to leaders from the smaller blood center partners.

Dedication

To my mother, Pearle F. Washington:

You have been my biggest cheerleader through it all! Your support and participation have made all the difference in my life.

To my husband, Mark Ryder:

Thank you for allowing me to be me. Your joyful spirit and positive insight keep me going.

To the youth in my family:

Get started today! You'll be so glad you did.

Acknowledgements

I am deeply grateful to my dissertation committee members. Dr. Carson Castleman, your prayers and insight on academic writing opened my mind to scholarly phrasing to help connect and convey ideas. Dr. Martin Rice, your dedication to ensuring my understanding and explanation of my data was far beyond my expectation. To my dissertation chair, Dr. Joanne Barnes, thank you for being a strong woman in my life. Meeting Dr. Barnes in the Master of Science in Management (MSM) program and learning of her accomplishments, I realized I had not challenged myself enough. From the MSM program, through the Doctor of Organizational leadership (DOL) program, to becoming my dissertation chair, I have appreciated your frank, yet sincere approach to teaching; even down to your email signature line – *warm regards*. Dr. Barnes you have been a great inspiration!

I must recognize my co-workers who supported me by taking surveys, being interview subjects, and for being flexible while I pursued my degree over the last several years. Everyone knew that upon return from a midterm residency or summer institute that I would come equipped with a leadership topic to add to the next meeting agenda. I thank my organization for allowing me to share and apply these leadership principles for the development of myself and the team. "As iron sharpens iron, so one person sharpens another" (Proverbs 27:17, New International Version).

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Chapter One: Introduction

Changes in healthcare policy and costs have driven leaders of healthcare organizations to find new efficiencies in their operating capacity. For most blood centers the ploy is to merge with other blood-related organizations for the promise of sustainable economic growth. While changes in organizational structure address economic matters, changes in rules, processes, and organizational culture can put stress and strain on leaders at a personal level. Negative emotions and stress over the newly merged organization can arise from the continuous trudge toward organizational alignment (Yoon & Kim, 2015). Unfortunately, organizations are likely to focus on the symptoms of stress and not the causes of stress (Rees, 1997). Consequently, a lack of emotional intelligence (EI) in an already unstable environment could mean poor leader performance which could threaten the future of the organization (Bar-On, 2006; Goleman, 1998a; Goleman, Boyatzis & McKee, 2013).

Challenges compound when four blood centers partner in a strategic alliance. When this many entities affiliate, it becomes essential for the strategic plan to include a preemptive approach to addressing emotions and stress along with budget and process alignment. Assessing leaders' ability to manage their emotions and stress provides a wealth of insight into the health of the organization. The individual who exhibits a higher emotional aptitude will experience a less negative response to change, which allows them to be more adaptable to stress (Bar-On, 2006; Ramos, Fernandez-Berrocal & Extremera, 2007). Educating leaders on the benefits of developing their emotional intelligence

provides leaders with the preparedness they need to sustain themselves and their organizations through any challenge. Beyond education and assessment, providing leaders with ongoing EI coaching, action planning, and reflection could help them retool for merger leadership.

General Nature of the Problem

The economic crisis in the blood industry has created a stressful situation for leaders who opt to engage in a merger to sustain their organization's foothold as a blood provider (America's Blood Centers, 2015; p. 1; 2017, p. 4). Multiple perspectives support the viewpoint that merger implementation often neglects to address the human aspect of the merger process (Buono & Bowditch, 1989, 1990; Cartwright & Cooper, 1992, 1996; Cartwright, Tytherleigh, & Robertson, 2007). As companies merge and downsize, executive turnover induces psychological impacts such as stress, anger, and fatigue (Krug, Wright, & Kroll, 2015; Noer, 2009). Integrating organizational cultures can also result in a culture clash, which is the source of some merger difficulties and stress (Clarke & Salleh, 2011; Waldman & Javidan, 2009).

Leaders must prepare for the emotional consequences that result from a merger by understanding their stress triggers and coping mechanisms (Mikolajczak & Luminet, 2008; Thach & Nyman, 2001). Goleman et al. (2013) and Park and Faerman (2019) posited that there is a difference between leaders who exhibit qualities of emotional intelligence (EI) versus leaders who do not. Leaders who exhibit elements of EI are better prepared to endure the constant pressure to adapt to merging cultures (Ramos et. al., 2007; Harrison-Walker, 2008).

Resetting the organizational structure and culture can trigger negative psychological impacts that become a factor in merger performance. Most mergers fail as a result of poor financial performance or cultural conflict (Weber & Camerer, 2003). Unfortunately, more than 55% of mergers fail to meet the expectations set forth in their original agreements (Kell & Landsberg, 2005; Sedlacek & Valouch, 2018). These are tough odds that are cause for concern for leaders engaged in a merger.

This study seeks to examine merged blood center leaders to better understand how EI, or the lack of EI, enhances or undermines the experience of the day-to-day charge of merger leadership. A leader who struggles with inflexibility or poor emotional management could transfer negative sentiment to the employees (Goleman, 2011). The influence of an emotionally inept leader could have traumatic effects on the new organizational culture (Maddocks, 2017). Giving high regard to leaders with high EI could ease the angst introduced by a merger and make for a better cultural fit for the affiliated organizations. Therefore, examining EI of leaders as a factor in successful mergers may keep blood centers in position to continue serving their local hospitals and patients.

Problem Statement

Leaders may not identify how much EI influences collaborative efforts within the organization (Blattner & Bacigalupo, 2007). EI is essential to one's ability to cope with stress when there is a constant need to respond to internal and external stimuli (Nizielski, Hallum, Lopes, & Schutz, 2013; Bar-On, 2007). Another complexity of a merger is the perception of status between the organizations. Although mergers pose challenges for all involved organizations, leaders from the smaller-sized organizations may have a sense of

being acquired and may face more challenges adapting to the relationship (Fischer, Greitemeyer, Omay & Frey, 2007). Members of a perceived acquisition are likely to experience a greater amount of changes imposed on them, including a loss of status, autonomy, and job control. These changes can lead to heightened merger stress and poorer physical and psychological health (Cartwright et al., 2007; Giessner, Horton, & Humborstad, 2016). Ignoring symptoms of stress could leave leaders vulnerable to negative feelings and behaviors that could create personal and social challenges at work. Therefore, the problem addressed in this case study examines how EI can be leveraged to function successfully in the context of a merger. Without these tools, leaders may succumb to the pressures of the merger and the new organization will be at risk for merger failure.

Research Questions

The overarching qualitative aspect will explore in what ways EI influences a leader's ability to function successfully during a merger. The research questions and hypotheses are as follows:

RQ1. What relationship exists between leaders' overall EI score and their stress management scale score?

$H1_o$: There is no relationship between the overall EI score and the stress management scale score.

$H1_a$: There is a relationship between the overall EI score and the stress management scale score.

RQ2. What relationship exists between a leader's self-perceived ability to tolerate merger-related stress as described in a qualitative interview

compared to the stress tolerance score measured by the Emotional Intelligence-Inventory 2.0 (EQ-i 2.0)?

$H2_o$: There is no relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

$H2_a$: There is a relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

RQ3. What relationship exists between a leader's self-perceived ability to adapt to merger-related stress as described in a qualitative interview compared to their flexibility score on the EQ-i 2.0?

$H3_o$: There is no relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

$H3_a$: There is a relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

RQ4. What relationship exists between the overall stress management score of leaders from the larger blood center and leaders of the smaller-sized partnering blood centers as measured by the EQ-i 2.0?

$H4_o$: There is no difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized blood centers.

$H4_a$: There is a difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized partnering blood centers.

Definition of Terms

The key terms that will guide this study are:

Adaptability: Altering one's thoughts and feelings to adjust to varying circumstances (Bar-On, 1997).

Blood Center: A blood center in this context includes any facility where blood and blood products are collected and stored such as blood banks, plasma centers, and hospitals (Indiana State Department of Health, 2012).

Blood Industry: A global market driven by the production of blood products collected for blood typing, transfusion, and other blood therapies (Indiana State Department of Health, 2012).

Emotion: Feelings that arise when a person's assessment of their environment creates a positive or negative perception based on the significance to the individual (Frijda, 2007).

Emotional Intelligence: Skills and abilities to manage perceptions that assist in coping with environmental stimuli (Bar-On, 1997).

Horizontal Merger: Firms that generate the same or multiple similar products, or service lines (Buono & Bowditch, 1989).

Leader: An individual within an organization who establishes objectives and directs its resources through "change-oriented behaviors to increase innovation, collective learning, and adaptation to external change" (Yukl, 2012, p. 72).

Leadership: The process of guiding members of an organization through the execution of day-to-day merger activities toward the integration of organizational cultures (Thach & Nyman, 200).

Merger: *C*ompanies that were previously independent prior to coming together in various combinations under a common ownership (Lajoux, 2006).

Post-Merger Stress: Affected mental and physical personal well-being caused by merger-related activity (Makri, 2012).

Organizational Culture: Shared beliefs within a group to solve "problems of external adaptation and internal integration" which are promoted as the "correct way to perceive, think, and feel in relation to those problems" (Schein, 2010, p. 18).

Post-Merger Integration: Combining "human resources, the corporate cultures, the operating and management information systems, the accounting methods and financial practices, and related matters" (Sherman, 2009, p. 17).

Social Identity Theory: The tendency of employees of a firm to classify themselves into social-oriented categories and according to organizational structures (Tajfel & Turner, 2004).

Stress: A transaction between one's perception of the environment and their response to the environment (Warren, 2002).

Delimitations

The scope of the study covered four selected blood centers that merged, but not all merged blood centers since they may differ structurally and contractually. The results of this study may not be generalizable to all mergers and acquisitions. The population of leaders included blood center department heads and executives. Middle management and front-line leaders were excluded from the study since they were not accountable for merger strategy and decision making. The scope included leaders who were in place prior to the merger, leading up to leaders who were in position up to 90 days prior to data

collection. Leaders with less than 90 days employment were excluded from the scope of the study. There were no excluding factors based on having direct reports since the study was based on self- perceptions. Assessment of leader EI was specifically focused on the stress management scale and subscales of flexibility and stress tolerance, and overall EQ-i 2.0 score. The study will not assess leaders on the other EI scales of self-perception, self-expression, interpersonal, and decision making. Stress, in the context of this study, is the additional pressures or intensified emotions or behaviors triggered by a merger; not stress that may be typical to daily work that can be generalized to every organization.

Assumptions Guiding the Study

It was assumed that time would be allowed for participants to complete the survey assessment online during work hours. It was an assumption that all department heads and leaders involved with merger implementation would participate in the study regardless of whether they had direct reports or not. It was assumed that a random sampling of leaders from each blood center would complete the survey and also participate in a qualitative interview. It was assumed that the respondents understood the context of the study as the merger experience and answer the survey questions based on the context. An assumption guiding this study was that at least one leader from each blood center would have experienced some degree of stress or similar phenomenon resulting from merger activity. There was an assumption that participants would respond truthfully to survey and interview questions and not respond based on hearsay or generalizations. It was assumed that the population would be available and responsive during the established timeframe that the quantitative survey was distributed. It was assumed that an appropriate sample size of leaders would participate in the study to represent the overall population of

leaders. Quantitative study variables of stress tolerance and adaptability in relation to overall EI score were assumed to have a linear and positive relationship. It was also assumed that personal interview responses in regard to stress perception would reflect the scores received on the quantitative survey in a linear manner.

Brief Literature Review

Mergers "are highly emotive and destabilizing change events" (Lotz & Donald, 2006, p. 2). Leaders must discover ways to develop a strong capacity for coping with stress during a merger. The likelihood of improving the merger experience will occur if leaders recognize non-economic factors, such as acknowledging and validating emotions during a major change process as a strategy for helping people adjust to the merger and their level of productivity (Kiefer, 2002). Leaders must have the ability to manage operational and emotional aspects of a merger (Marks, 2006).

Blood Industry Mergers

Organizational restructuring is more prevalent in the current economic environment presenting blood center leaders with multiple concerns about how their organizations will continue to serve the blood industry (Carden & DelliFraine, 2005). Recent mergers of independent blood centers in the United States (U.S.) are a result of industry shifts caused by a decrease in blood utilization by the nation's hospitals. Lower reimbursement rates to hospitals for fees associated with blood transfusion-related care influenced this downturn in blood utilization (Centers for Medicare & Medicaid Service, 2015). Since 2008, there has been a 25% reduction in blood usage at hospitals (see Table 1) (America's Blood Centers, 2015).

Table 1

CMS Proposed Key Blood Component Rate Changes from 2016 to 2018

Product	2016	2017	2018 Proposed	% change 2016-18	% change 2017-18
Cryoprecipitate	$59.64	$53.03	$38.29	-35.8	-27.8
Plasma (frozen/8hrs)	$72.56	$73.73	$71.96	-0.8	-2.4
Plasma (frozen 8-24hrs)	$73.08	$74.00	$75.50	3.3	2.0
Platelet, pheresis	$425.15	$412.10	$435.88	2.5	5.8
Platelet, pheresis (irradiated)	$528.11	$556.58	$541.23	2.5	-2.8
Platelet, pheresis, LR	$488.29	$499.95	$481.24	-1.4	-3.7
Platelet, pheresis, LR (irradiated)	$641.85	$647.40	$627.56	-2.2	-3.1
Platelet, pheresis, LR (CMV negative)	$462.48	$422.00	$328.98	-28.9	-22.0
Platelet, pheresis, LR (CMV-, irradiated)	$443.65	$618.89	$589.67	32.9	-4.7
RBC, LR	$184.34	$185.82	$184.23	-0.1	-0.9
RBC, LR (irradiated)	$267.63	$266.28	$259.89	-2.9	-2.4
RBC	$145.79	$142.36	$143.27	-1.7	0.6
Platelets (whole blood derived)	$118.03	$96.49	$113.58	-3.8	17.7
Whole blood	$221.62	$151.51	$119.39	-46.1	-21.2

Note. CMV- is an abbreviation for cytomegalovirus. LR is an abbreviation for leukoreduced. RBC is an abbreviation for red blood cell.

By 2011, 31% of hospitals had instituted a patient blood management program (PBM) or some element of the program to establish evidence-based guidelines for reducing blood transfusions and to develop alternative therapeutic treatments for patients rather than blood therapy (U.S. Department of Health and Human Resources, 2011). PBM programs also serve to increase stewardship by reducing costs associated with managing blood inventories in hospitals (Premier Healthcare Alliance, 2012).

As cost efficiencies, research, and patient safety initiatives necessitate a new clinical mindset, the campaign for reduced blood utilization continues to gain support as a best practice among physicians (America's Blood Centers, 2013; Goodnough et al., 2014; Karafin & Bryant, 2014). To align with reduced blood demand from hospitals, a common model for blood center operations moved to mergers, alliances, or acquisitions (America's Blood Centers, 2017).

Merger Stress

A merger can be a traumatic and life-changing event for those who remain with the new organization (Harrison-Walker, 2008). There are various reasons mergers become a source of stress for leaders and have adverse impacts on their personal and professional contentment, and job performance. Some leaders who are involved in reorganization have reduced levels of job satisfaction (Callan et al., 2007). During the merger process, emotions can become overwhelming to the point of negatively impacting job satisfaction, job performance, and could result in turnover (Yoon & Lee, 2012).

Stress becomes a factor for leaders who operate with a mindset of being acquired and they may feel threatened (Terry & Callan, 1998), or perceive less than fair treatment (Giessner, Tendayi Viki, Otten, Terry, & Täuber, 2006; Terry & O'Brien, 2001).

Although a merger may be stressful for partnering organizations, leaders who sense a take-over experience more negative responses in comparison to the leaders from the larger initiating or pursuant organization (Fischer et al., 2007). Employees in the frame of mind that an acquisition has occurred also adjust more poorly to the merger over time (Amiot, Terry, & Callan, 2007). Conversely, other research showed that the status of the organization (acquiree/acquirer, larger/smaller) is not always a source of stress (Terry, Carey, & Callan, 2001). Once all employees gained mutual access to resources and benefits then employees experienced reduced stress and better psychological stability (Panchal & Cartwright, 2001).

For many organizations, there are forces that are acting simultaneously, making a more stressful workplace, as the marketplace becomes more competitive and pressures persist to improve efficiency and increase profitability. Such an environment can be problematic for individual performance (Faragher, Cooper, & Cartwright, 2004). Responding to stress involves behavioral and psychological adjustment (Lotz & Donald, 2006). One's interpretation of stress is essential to the response to stress. The more uncertainty there is surrounding the merger, the more significant the discrepancy between perceived stress and one's stress coping capacity (Lotz & Donald, 2006).

Emotional Intelligence

Emotional intelligence has been strongly connected to multiple disciplines of psychology. The origins of EI can be found in Darwin's (1965) literature on the adaptive expression of emotions and Thorndike's (1920) concept of social intelligence. Alexithymia, an inability to identify, describe, and attend to one's feelings, is also a precursor of EI (Nemiah, Freyberger, & Sifneos, 1976), along with Gardner's (1983)

philosophy on general intelligence being comprised of intrapersonal and interpersonal intelligences.

The concept of EI was expanded by theories and studies conducted by many researchers (Bar-On, 1997; Goleman, 1995; Salovey & Mayer, 1990). The model of EI was introduced by Salovey and Mayer (1990) as a skill set that contributes to the assessment, expression, and emotional regulation of self and others. Their definition stated that EI includes the application of emotions to inspire, plan, and accomplish (Salovey & Mayer, 1990). Bar-On (1997) described EI as an ability to use perceptual skills to assist in managing oneself in the presence of challenging circumstances. Dissertation research on EI by Bar-On (2000) included the first scored assessment of EI; an emotional quotient (EQ). Mayer, Salovey, and Caruso (2008) more recently defined EI as having a greater aptitude to process complex emotional information and leverage it to effectively discern the relevance of stimuli to regulate thoughts and actions.

EI allows one the capacity to examine different perspectives, make changes in emotion or mood, and understand different emotional states (Mayer, Salovey, Caruso, & Cherkasskiy, 2011). EI can be used to help decision makers select possibilities and make choices among multiple options; facilitating the ability to predict a response to certain situations (Damasio, 2008; Shiv, Loewenstein, Bechara, Damasio, & Damasio, 2005). Awareness of emotions deals with comprehending the causes and effects of one's state of mind and sentiments, and how these develop over the course of a lifetime (George, 2000).

Emotional Intelligence and Leaders

Leaders vary in how they perceive and comprehend diverse circumstances, relationships, and change events that bring about emotions. For example, a leader who is surprised when a follower reacts with fear and anxiety to an announcement of organizational restructuring is not adequately knowledgeable about the causes of emotions (George, 2000). Emotional leadership is an art that involves the achievement of work-related task in a manner that does not offend others (Goleman, Boyatzis, & McKee, 2002).

Bradberry and Greaves (2005) conducted research that indicated that leaders who had an elevated EI, as compared to leaders with lower EI, had a 20% higher productivity rate in relation to job performance. Another study conducted by Ozcelik, Langton, and Aldrich (2008) showed that leaders who exhibited high EI skills had increased revenue and strategic growth, and achieved outcomes set forth by their organization. Additionally, the attainment of organizational goals was more prevalent if the leader who was overseeing the tasks demonstrated the ability to incorporate their EI skills into the management of those they supervised.

Goleman (1995) stated that when executives or other teams come together, the sum total of the group members' IQ will factor in the group's performance. However, the most important factor in group performance is EI in regard to the leader's ability to establish social harmony. Group harmonization "will make one group especially talented, productive, and successful" where teams who are equal only in IQ will do poorly (Goleman, 1995, p. 160).

The indication for leaders who leverage EI is that they respond to work with excitement, see opportunities for growth, and threats become challenges that can be met with enthusiasm (Goleman, 1998b). Ozcelik et al. (2008) discovered that when leaders of organizational teams value EI skills, the resulting working environment was conducive for positive performance outcomes.

Emotional Intelligence and Mergers

Harrison-Walker (2008) asserted that employees who endure a merger also experience a multi-stage recovery process before adjusting psychologically and emotionally for continued performance and productivity. Survivors of a merger experience cognitive and emotional responses similar to those experienced during the bereavement process (Bourantas & Nicandrou, 1998; Matthews, 2010).

Seven stages of transformation were identified for merger survivors:

(1) insecurity; workers feel anxiety regarding the significant changes in the work environment, (2) embarrassment; relationships become awkward as workers feel shame and embarrassment over retaining their positions while others are terminated, (3) anger; workers feel anger and resentment toward the organization for taking these disruptive actions, (4) guilt; concerned that they share some responsibility for what has happened, (5) searching; workers seek logical explanations for the changes, and to understand their new roles and responsibilities, (6) surrender; with sadness, workers accept the "death" of their old organization, and (7) growth; a sense of security is restored as workers adapt to the new work environment and experience personal and professional growth.

(Harrison-Walker and Alexander (2002) as cited in Harrison-Walker, 2008, p. 2–3)

Emotional intelligence positively influences job survivors' capability to transition through the stages of survivor recovery. EI is essential to achieving and maintaining organizational success because the ability to positively use emotions can result in enhanced decision-making coupled with heightened innovation (Cross & Travaglione, 2003). As organizations look for ways to survive and thrive, they must leverage intellectual capital and improve collaboration by enhancing their level of emotional intelligence (Goleman, 1995).

Research Methods, Tools, and Procedures

To provide a strategy for completing a mixed-methods comparative case study, a detailed approach is presented to guide the research process. Case studies are conducted to advance the understanding of a phenomenon at a given point in time. Sometimes multiple cases are studied for comparison or to propose generalizations (Leedy & Ormrod, 2013). In mixed-methods studies, data is integrated by comparing quantitative (numerical data) with qualitative data, such as open interviews (Miles, Huberman, & Saldana, 2014). With a mixed-methods approach, data is triangulated as a way of crosschecking results, making survey data more robust and providing more rigor to the study (Bryman, 2008). The following sections, a description of the research process will include specifics regarding the description of the population, participant selection, the research tool, data collection methods, procedures for data collection, and analysis of data.

Description of the Population

The organizations in the study were blood centers defined as entities that include blood banks, plasma centers, hospitals, and other facilities where blood is procured or stored (Indiana State Department of Health, 2012). The study participants were leaders from four blood centers in the Midwestern United States that engaged in a four-way merger. These pre-merger organizations were previously four independent blood centers in different states that entered into a merger agreement at various phases of each organization's life cycle. Once all four centers were affiliated, a full alignment strategy was set into action which created one blood center spanning across four states. Decision making was mainly centralized at a headquarter in one state with one CEO overseeing all states. The population consisted of 89 leaders across all four affiliated blood centers which required a sample size of 72 respondents to achieve a 95% confidence level.

Selection of Participants

Selection of the blood center leaders who participated in the study was conducted in collaboration with the Chief Human Resource Officer (CHRO), who also approved the nature of the study. Participants were selected based on their level of accountability for merger strategy and implementation. Based on the criteria of accountability, leaders who participated in the study were department heads and executives responsible for decision making and merger implementation. This sample accounted for director level leaders and above.

Research Tools

Emotional intelligence tools are divided into categories of ability-based, trait-based, or mixed-model methods. Ability based models measure EI based on performance

of skills, whereas trait-based models measure perceived ability through self-assessment (Petrides & Furnham, 2001; Brackett & Geher, 2006, 28). The EQ-i 2.0, a trait model, was selected for this study (O'Boyle, Humphrey, Pollack, Hawver, & Story, 2010; Petrides, Pita & Kokkinaki, 2007). A trait model measure is appropriate because it is self-assessed where scores are reflective of individual perceptions of emotional ability, rather than actual performance measures or skills testing (Brackett & Geher, 2006; O'Boyle et al., 2010; Petrides, Pita & Kokkinaki, 2007). The EQ-i 2.0 has one overall total EI score, with five scale scores, which are then divided into 15 subscales (see Appendix A). The EQ-i 2.0 is an online, self-administered, 133 item assessment requiring approximately 20 minutes to complete (Multi-Health Systems, 2011). Permission to administer the assessment was provided by Multi-Health Systems (see Appendix C).

Data Collection Methods

This is a mixed-methods study, analyzing qualitative and quantitative data to explore and analyze findings. Mixed-methods research is useful in that one of the two methods helps explain the findings of the other method; enhancing the integrity the research findings. A mixed-methods approach also provides a better picture of the contextual nuances that may not be discovered through a survey (Bryman, 2006). All participants completed the EQ-i 2.0 online assessment. The qualitative element was conducted with a sample population of leaders who completed the online assessment. The data will be in analyzed, integrated, and triangulated to draw inferences about the population.

Procedures for Data Collection

The email addresses of all department heads and executives at the four blood centers were provided by a Human Resources Administrator. The researcher emailed study participants an invitation to take part in a mixed-methods study with a brief background of the study. The email included a link to complete the EQ-i 2.0 and an electronic consent (see Appendix D) to acknowledge before completion of the online assessment. Participants were instructed to complete the assessment within a time frame of two weeks. Email reminders to complete the surveys were emailed one week, then two days prior to the survey closing date.

Twenty study participants who completed the online assessment survey were selected to participate in a semi-structured interview session. The selection process was conducted using a random number generator to select five leaders from each state. When the number of leaders was not balanced due to lack of available leaders or low response rate, then another leader was selected until each state was equally represented, or until the leader pool was exhausted. Doing this ensured that leaders from all states were represented and that the data would be generalizable to the leader population across all four states. Convenience sampling was conducted in states where there was an unequal distribution of leaders. Bryman (2008) posited that convenience sampling "is a sample that is selected because of its availability to the researcher" (p. 692).

Open-ended interview questions (see Appendix E) were developed post collection of the quantitative assessment to gain deeper insight to the quantitative responses. Each interview participant was presented Research Participant Consent Form prior to answering the interview questions (see Appendix E). The interviews were held in an

onsite conference room or by video conference. All study data will be kept confidential in a locked file cabinet or stored on a secure server for a minimum of three years.

Analysis of Data

SPSS 26 was used to perform descriptive statistics and other statistical tests appropriate for the study. The Shapiro-Wilk was run to test for normality. A regression analysis provided a predictive value about whether leaders with high EQ cope with stress more effectively in a merger than leaders who do not score high in overall EQ. A Pearson correlation coefficient was calculated to establish the strength of the relationship between variables. A *t-t*est compared the mean scores between the two groups (larger and smaller blood center) within the sample.

Recorded qualitative data from the semi-structured interviews of selected participants was imported in NVivo CADQA software. The data were queried and analyzed through narrative and thematic coding of interview transcripts to display nodes and themes that suggest relationships between data (QSR International, n.d.). Then quantitative and qualitative data were compared to develop results for hypothesis testing.

Contribution to the Field of Leadership

With the shift of blood centers continuously moving away from independent operations toward merged operations, organizations must proactively address the leader's capacity to cope with emotional challenges brought on by merger activity. Concentration on adaptability and managing stress levels of leaders puts merging organizations in a better position to provide tools for leaders to cope more effectively with challenges that could impede decision making and conflict resolution. When the emotional capacity of the leader is nurtured, leaders will manage their professional relationships more

effectively and demonstrate a positive approach to the merger experience. A stable emotional mindset of the leader will influence how others experience the merger and result in a less stressful organizational culture. The future of merger planning and implementation would benefit from an assessment of emotional intelligence at the leadership level to get in front of personal and professional issues that can hinder individual and team success, if left unassessed. Development of emotional intelligence as a tool for better merger leadership is one measurable aspect of a leader's character that can be an asset to merging organizations.

Chapter Two: Literature Review

Merger implementation often neglects to address the emotional impacts of the merger process (Buono & Bowditch, 1989, 1990; Cartwright & Cooper, 1992, 1996; Cartwright et al. 2007). When companies reorganize as a result of mergers and acquisitions (M&A), downsizing and turnover induce psychological impacts such as stress, anger, and fatigue (Krug et al., 2015; Noer, 2009). Recent mergers of independent blood centers in the United States are a result of changes in healthcare reimbursement policies that caused a decrease in blood utilization by the nation's hospitals. Reimbursement rates for blood products and services were proposed to be reduced as low as 46% (Centers for Medicare & Medicaid Services, 2017). This shift created an economic crisis that forced some blood center leaders to develop new partnerships to sustain their organization's viability in the current blood industry (America's Blood Centers, 2015). The strategic plan for most blood centers includes merging with other blood-related organizations to increase economic growth. This is a major change from an industry of historically independent blood centers.

Unfortunately, more than 55% of mergers fail (Kell & Landsberg, 2005; Sedlacek & Valouch, 2018). Faced with these odds, leaders are under stress. Consequently, a lack of emotional intelligence in an already unstable environment could mean poor leader performance that could threaten the future of the organization (Bar-On, 1997; Goleman, 1998a). Leaders play a significant role in a merger as they need adept leadership skills to minimize cultural conflict and to develop new allegiances within the new institution (Harman, 2002). According to Kavanagh and Ashkanasy (2006), leaders must be proficient at coaching individuals to accept changes brought on by the merger. There

must be attention to human resources practices during merger integration otherwise the success of the merger could be adversely affected (Shield, Thorpe, & Nelson, 2002; Yu, Engleman, &Van de Ven, 2005). Leaders must prepare for the emotional consequences that result from merger activity and take time to understand their own emotions while they, themselves, are amidst change and uncertainty (Mikolajczak & Luminet, 2008, p. 1446; Thach & Nyman, 2001).

The following literature review will explore the foundations of EI and implications for leaders based on their EI aptitude. Next, stress will be discussed in terms of EI, in particular, perceptions of stress, stress coping skills of the leader, and how the psychological state of the leader influences behaviors and organizational effectiveness. Finally, there will be an overview of mergers and a discussion of how merger activity brings on symptoms of stress that are perceived and exhibited differently by leaders.

Theoretical Overview of Emotional Intelligence

The role of emotions in organizations is necessary because emotions can have an effect on the way decisions are made, behaviors, and perspectives (Kahneman, 2011). Discussions about intelligence and emotions date back to the late 19th century when mental activities were separated into divisions of emotions, intellect, and will (Cope, 1883). From Cope's (1883) perspective, emotions are distinct from intelligence. Emotions are a matter of preference whereas intelligence sets the order for how experiences are perceived based on likes, dislikes, imagination, or reasoning. One's *will* is the "power of the mind" where "processes are originated, directed, or restrained" (Cope, 1883, p. 908).

Leuner (1966) originated the term emotional intelligence, however, literature on emotional expression date back to Darwin's early works on the construct of adaptive emotional expression where he argued that all humans and some animals demonstrate certain emotions in a similar manner and that these traits are passed on through heredity (Darwin, 1872, 1965). Darwin compared facial muscle movement causing eyebrows to raise, lips to protrude, flaring of the nostrils, and even the shrugging of shoulders to be situationally consistent across cultures and species (Darwin, 1872, 1965). Around the same time, Bain (1880) explored interconnections between emotions, behavior, and intellect and found that emotions are connected with people's beliefs, morality, and their ability to control their thoughts and feelings. Similarly, Sully (1910) linked emotional and intellectual experiences as powerful influencers of an individual's perceptions. EI has continued to be viewed by other researchers as a harmonious integration of emotion and intelligence (Akerjordet & Severinsson, 2007; Freshwater & Stickley, 2004).

EI also has origins stemming from Thorndike's (1920) concept of social intelligence, declaring that social intelligence is "The ability to understand and manage men and women, boys and girls - to act wisely in human relations" (p. 228). Thorndike asserted that there are three types of intelligence: social, practical, and abstract. Thorndike's views on social intelligence are strongly connected to developmental, educational, clinical counseling, industrial, and organizational psychology (Davies, Stankov & Roberts, 1998; Killian, 2012; Law, Wong & Song, 2004; Seal & Andrews-Brown, 2010). Meyerson (1921) explained emotional intelligence as the way people cope with antagonism and power based on their emotional, instinctual, and intellectual responses; noting that these individual responses could modify behavior. Then, MacKaye

(1928) advanced the study of the interrelation of emotion and intelligence with the assertion that this interplay has a heavy influence on behavior, performance, attitude, and regulation of emotional and social stability. Cleeton and Mason (1946) conducted a study on the relationship between emotions, intelligence, and the individual's environment, but were inconclusive as to whether the environment influenced one's emotional capability. Wechsler (1950) argued for other factors of intelligence that are "capacities and traits dependent upon temperament and personality which are not restricted to logical and abstract perception; they are…factors of personality itself" (p. 78).

Precursors of EI include alexithymia, which is a clinical trait characterized by an inability to identify, describe, and attend to one's feelings (Nemiah et al., 1976). Gardner (1983) philosophized that there are distinct elements that make up general intelligence: intrapersonal and interpersonal intelligences. Gardner's (1983) definition of interpersonal intelligence as having insight to and willingness to work within the motivation of others. Affective orientation is another construct linked to EI which refers to individuals who are self-aware and use that information to guide social interactions (Salovey & Mayer, 1990; Taylor & Bagby, 2000). Saarni (2000) defined emotional competence as the capacity and skill to respond to the emotions and successfully manage interactions with others. The construct of psychological mindedness encompasses the desire to gain meaning from experiences by looking inward rather outward at external factors; using reason to reconcile ideas, sentiments, and behaviors (McCallum & Piper, 2000).

Models of Emotional Intelligence

Salovey and Mayer (1990) introduced EI as contributing factors of assessment, expression, and emotional control over one's self and others. EI includes the utilization of

emotions to inspire, plan, and accomplish (Salovey & Mayer, 1990). The works of Salovey and Mayer (1990), Mayer and Salovey (1997), Goleman (1995, 1998b), and Davies et al., (1998), proposed a multi-dimensional hierarchy of EI comprised of four aligned primary components: 1) *Self-awareness* (recognizing emotions in one's self and sensing the effect of one's emotions on others); 2) *Emotional Expression* (recognizing when emotions may or may not be reasonable in certain situations); 3) *Regulation and management of emotions* (comprehending the precursors and impacts emotions have in how they influence perceptions and the differences in how people express themselves; 4) *Social Skill* (using reflection to manage the dispositions of others and navigate situationally).

Bar-On (1997) defined EI skills and abilities to manage perceptions to assist in coping with environmental stimuli. Bar-On's (2006) is model is comprised of five key factors: *intrapersonal capacity*, *interpersonal skills*, *adaptability*, *stress management* and *general mood*. Appendix B displays the competencies and skills associated with each of the five key factors. Mayer et al. (2008) more recently defined EI as the greater capability of some individuals more than others to process complex emotions and stimuli to inform thought and actions. In a study of EI, as it informs creative cognitive processing, Jafri, Dem, and Choden (2016) asserted that higher EI facilitates an improved ability to assess matters and contemplate new and unique ideas. Organizations can enhance their employees' creative thought processes with EI development and make productive use of improved levels of individual execution and organizational outcomes (Jafri et al., 2016).

Alexithymia, affective orientation, and emotional competence align with other models of EI in regard to thoughts, awareness, and emotional expression as defined by

Mayer and Salovey (1997) and Goleman (1998a). Whereas social intelligence and psychological mindedness more closely align with the definition of EI (Bar-On,1997) because the environment is a key factor when integrating concepts of thought, emotions, and actions (Ramesar, Koortzen, & Oosthuizen, 2009).

Dimensions of Emotional Intelligence

Emotional intelligence is composed of self-focused and other-focused dimensions (Pekaar, Bakker, Born, & Van der Linden, 2018). Emotional intelligence literature is limited in that the assessment instruments have made no distinction between self-focused and other-focused dimensions (Pekaar et al., 2018). More recently, scholars have focused attention on the importance of distinguishing self-focused EI from other-focused EI by showing well-defined differences in results (Brasseur, Gregoire, Bourdu, & Mikolajczak, 2013; Mikolajczak et al., 2015; Troth, Lawrence, Jordan, & Ashkanasy, 2018).

Other-focused EI. Other-focused EI dimensions are categorized by efforts to alter other people's psychological state. This concept of other-focused EI has foundations in social competence (Rose-Krasnor, 1997) and social-information processing (Crick & Dodge, 1994; Lemerise & Arsenio, 2000) that highlight the importance of emotional skills directed at others. In the first stage of interacting with others, selecting the right approach for managing social situations is crucial. Then, execution of the selected approach is the key to positive outcomes (Lemerise & Arsenio, 2000). Leadership and interview effectiveness, along with prosocial behavior, such as benevolence, are linked to other-focused EI (Nozaki, 2015; Pekaar et al., 2018).

Most individuals with high EI experience success in social situations (Van der Linden et al., 2017) and are better performers in social jobs (Joseph & Newman, 2010).

Considering individuals in customer service roles, individuals with high EI are skillful at making distinctions between customers who are open to engaging with a sense of humor versus customers who prefer to operate from a more formal approach (Salovey & Mayer, 1990). Pekaar et al. (2018) argue that other-focused EI dimensions are mainly at the root of this level of social flexibility. Rose-Krasnor (1997) argues that individuals with higher social effectiveness are successful at social engagement because they find personal fulfillment while maintaining beneficial relationships.

Self-focused EI. Self-focused EI dimensions are a reflection of one's mood which may be a factor in a person's state of mind when involved in psychologically stressful tasks at work. Theories on stress, coping, and emotion regulation are linked to self-focused EI (Grandey & Melloy, 2017; Jordan, Ashkanasy, & Hartel, 2002; Lazarus & Folkman, 1984). Self-focused EI dimensions may have an effect on reactions to stress and on the skills used to cope emotionally (Jordan et al., 2002). One's psychological disposition is positively aligned with EI (Mikolajczak et al., 2015; Schutte, Malouff, Thorsteinsson, Bhullar, & Rooke, 2007), along with one's physical welfare (Martins, Ramalho, & Morin, 2010), and professional satisfaction (Zeidner, Mathews, & Roberts, 2009).

Individuals with a high EI experience less emotional stress because they demonstrate high better emotion appraisal and better stress management skills (Zeidner et al., 2009). This appraisal process first begins when an individual determines the degree of impact that a stress factor will have on their personal safety and ability to accomplish goals. This primary appraisal evokes an affective reaction, followed by an assessment of one's coping skills. The primary and secondary appraisals work together to govern the

perception of the presence of a threat or a challenge. Self-focused EI may direct the primary appraisal because it assists in determining which stressor is important enough for a reaction (Ashkanasy, Ashton-James, & Jordan, 2003). Therefore, the stress response of high self-focused EI individuals will be more accurate (Pekaar et al., 2018). Coping strategies may be determined via the assistance of the secondary appraisal as it determines the appropriate method to apply in stressful situations (Ashkanasy et al., 2003; Jordan et al., 2002).

Stress

Stress is defined as a transaction between an individual's assessment of the external environment and his coping skills (Warren, 2002). Nevid, Rathus, and Greene (2005) defined stress as a pressure or demand placed on an organism to adapt or change. Individuals perceive stress based on the context of their experiences. Stress coping refers to one's effort to control and problem solve through a situation viewed as challenging (Lazarus & Folkman, 1984; Cox, 1985). In this study the term *coping* will be used interchangeably with the term *management*. Coping is a method of addressing and solving problems while the result of failing to manage the problem results in stress (Cox, 1985). Coping requires the use of strategic thinking to guide behaviors to adapt to a different set of circumstances. When the root cause of an issue is addressed in a manner that reduced stress, then stress coping was regarded as successful (Strumpfer, 2003).

Emotional Labor Theory

Emotional labor theory states that emotion regulation on the job is associated with higher rates of employee stress, however employees who effectively regulate their emotions experience less stress at work (Grandey & Melloy, 2017). The transactional

model of stress asserts that stress is experienced when individuals sense their current situation as a challenge greater than their ability to cope (Lazarus, 1966; Lazarus & Folkman, 1984, 1987).When threatened by a stress trigger, the level of stress is intensified (Grandey & Melloy, 2017). Conducting research in the food service business, Sy, Tram, and O'Hara (2006) compared the level of job satisfaction of leaders to that of their followers. Leaders high in EI help their employees maintain optimistic attitudes while performing emotional labor, which requires employees to regulate their emotions while interacting with customers, coworkers, and superiors (Ashforth & Humphrey, 1993; Diefendorff, Croyle, & Gosserand, 2005; Hochschild, 1979; Pekaar et al., 2018; Pugh, 2001; Rafaeli & Sutton, 1990). A lack of autonomy is a factor for employees who perform jobs with associated emotional labor (Bono & Vey, 2005, Grandey, Fisk, & Steiner, 2005).

Stress and Emotional Intelligence

Distress and increased anxiety erode mental abilities and cause people to appear to be emotionally intelligent (Yang & Gu, 2007). When people are troubled, they have problems recognizing emotion in others, resulting in negative social interactions. Job satisfaction surveys showed that emotions people experience at work reflect in their work performance. People work best when they feel good, indicating increased mental processing and an optimistic perspective. These feelings (good or bad) are influenced by leaders. Leaders who dampen the moods of others are bad for business; on the contrary, leaders who inspire good moods are good for business outcomes (Jamali, Sidani, & Abu-Zaki, 2008; Mikolajczak, Roy, Liminet, Fillée, & De Timary, 2007). Leaders often operate under a microscope and feel scrutinized, which inhibits learning, risk-taking, and

creativity. Leaders are more responsive and open to learning when they have a sense of security (Goleman et al., 2002). Leaders with high EI respond to stress with resilience and perceive challenges as development opportunities, instead of a burden (Goleman, 1998b). Outcomes of stress-related studies reported that that EI is positively linked with mental dexterity and a healthier physical condition (Martins et al., 2010; Schutte et al., 2007).

Goleman (1998b) differentiated between individuals who respond with positive energy to stress versus others who view stress as devastating. Provided with emotional development resources, devastating situations may be handled with optimism (Goleman, 1998b). A stressful encounter causes the body to secrete stress hormones: adrenaline and noradrenaline. Cortisol is also secreted, lasting longer than adrenaline and interfering with learning by affecting the brain cells in the hippocampus (Goleman et al., 2002). Implications for leaders is that poor leader-follower interactions can leave subordinates with chronic anger. This anger can be disruptive at work and negatively impact customer satisfaction and result in lost revenue (Goleman et al., 2013). Leaders must understand their influence on subordinates and acknowledge that an environment where people feel good helps them process information better and exhibit sound decision making. When employees feel good, they deliver on job expectations (Mikolajczak et al, 2007). The leader in any group is the one who acts as the emotional guide to drive positive emotions and rid any negativity within the group (Hopkins, O'Neil & Williams, 2007). Understanding emotions provides leaders with the information to understand the motivations of others and their points of view (Caruso, 2003). A study of EI on

performance predicted better leadership favorability, while cognitive ability was only a predictor of task execution (Offermann, Bailey, Vasilopoulos, Seal, & Sass, 2004).

Emotional Intelligence, Stress, and Adaptability

Globalization has created a business environment of increased competition, continuous organizational development, intense drive for more cost efficiencies, and tighter budget controls. There are more added pressures stemming from technological advancements, changes in consumer demand, privatization, deregulation, and M&As. Such challenges can result in downsizing and restructuring; leaving employees with a sense of insecurity and increased stress over the loss of competent employees and increased workloads (Goleman et al., 2002; Rees, 1997). To stay viable, leaders must be astute on organizational strategy, structural, and cultural developments (Higgs, 2002; Langley, 2000). These kinds of changes cannot solely focus on process change, but must give thought to how people think, behave, interact with their coworkers, their perceptions, and how they adapt to change (Ndlouvu & Parumasur, 2005).

Those who possess a clear understanding and control of their emotions adapt more readily to stressful situations (Ramos et. al., 2007). Adaptability is essential to one's success in managing stress (Goleman, 1998b; Hellgren, Naswell & Sverke, 2005). However, the focus is typically on the symptoms of stress, instead of the root causes of stress, which can aggravate an already demanding situation for leaders (Rees, 1997). Self-awareness is a key to maneuvering stress, as is the emotional intelligence scale of stress management (Bar-On, 1997; Goleman, 1998a). Without emotional intelligence, an unstable environment could be detrimental to everyone involved. "Managing our

emotions and relating to others are among the greatest challenges that we face in life" (Lopes & Salovey, 2004, p. 299).

Mergers and Acquisitions

Mergers and acquisitions have increased worldwide (Cho, Lee, & Kim, 2014). In 2017, over 50,000 M&A transactions were announced, which is a 2.9% increase in M&As compared to 2016 (Institute for Mergers, Acquisitions and Alliances, 2017). Mergers are a crucial strategy for organizations to sustain their business in the global market (Bommaraju, Ahearne, Hall, Tirunillai, & Lam, 2018). Unfortunately, from 50% to 70% of mergers fail to increase profits or meet the strategic goals negotiated in their contracts (Christensen, Alton, Rising, & Waldeck, 2011; Grotenhuis, 2009, Sedlacek & Valouch, 2018, p. 397). Research has attributed M&A success and failure to either strategic fit between the merging organizations or sociocultural issues during the integration phase (Bommaraju et al., 2018; Sedlacek & Valouch, 2018, p. 397). Mergers are traumatic that dramatically redirect the of employees (Ghauri & Buckley, 2003). Attitudes about the merger (positive or negative) may be of great significance to whether the integration is successful or not (Sung et al., 2017).

Merger and acquisition (M&A) research identified two factors that can strengthen or thwart a merger: (a) organizational identification: where individuals identify as a having organizational membership (Ashforth & Mael,1989); and (b) sentiment and actions that influence the level of organizational involvement (Tsui, Egan, & O'Reilly, 1992), including job satisfaction, their intentions to stay, and voluntary turnover (Amiot, Terry, Jimmieson, & Callan, 2006; Lee & Mitchell, 1994a, 1994b; Van Dick, Ullrich, & Tissington, 2006). The literature on mergers focuses on the complicated process of

integrating previously independent teams and the self-identity issues that employees experience (Shrivastava, 1986).

Social identity theory (SIT) research dominates a broad scope of the examination of mergers, whereas literature on organizational change often utilizes the exchange theory perspective where employees base their level of engagement based on their access to benefits, income, and job security (Sung et al., 2017). Organizational change literature takes into account personal valence beliefs where individually focused concerns such as benefitting or suffering as a result of a change strongly influence employee attitudes and their response to the change effort (Holt, Armenakis, Feild, & Harris, 2007; Oreg, Vakola, & Armenakis, 2011; Vakola, Armenakis, & Oreg, 2013).

Integration of literature on the impacts of mergers on employee reactions suggests that reactions are influenced by the way large-scale change impacts them personally and the impact on the organization (Oreg et al., 2011; Vakola et al., 2013). These two assessments are explained further in the next paragraphs by the distinction between the organizational valence and personal valence constructs (Holt et al., 2007). This discussion on employee reactions during organizational transitions continues with an exploration of the literature on social identity theory (SIT). Further dissection of SIT sheds light into the influence of organizational status and merger integration patterns on leader stress coping capacity and adaptability during the merger process.

Organizational Valence

Organizational valence, in the context of change theory, is the extent to which employees believe that a change effort will benefit the organization (Armenakis, Bernerth, Pitts, & Walker, 2007; Cole, Harris, & Bernerth, 2006; Holt et al., 2007; Holt

& Vardaman, 2013). Also, sentiments about the effects or organizational status are imperative in informing employee reactions to merger activity (Giessner, Ullrich, & Van Dick, 2012). Sung et al. (2017) supports these assertions by iterating that organizational valence is inclusive of employees' perception of the merger being advantageous to their organization's status along with the believing that the change will have benefits for the organization.

Mergers create a new superior organizational membership for employees, causing them to consider how this membership will affect their concept of themselves (Giessner et al., 2012). Perceptions that the new organizational membership is an upgrade over the membership in their prior independent organization can have positive effects on employees' reactions to the merger, including positively identifying with the new integrated organization (Gleibs, Mummendey, & Noack, 2008; Amiot et al., 2007; Van Dick et al., 2006).

Personal Valence

Organizational valence cognitions in tandem with significant major organizational change can elicit intensified concerns about uncertain performance in new roles, equitable rewards, and loss of authority and circle of influence (Van Dick et al., 2006). Personal valence is a construct that describes an employee's belief that merger-related change benefits them personally. Employees assess whether each merger-related change is a benefit or a cost to them, which, in turn, relates to an increase or decrease in personal valence. From an exchange theory perspective, employees' reactions to the merger are based on personal valence (Sung et al., 2017). Personal valence can be interpreted very broadly, but in the organizational change literature it is generally comprised of constructs

that are directly relevant to the type of large-scale change brought on by M&As: job security, job continuity, distributive justice, and personal status (Oreg et al., 2011; Vakola et al., 2013).

Merger activity tends to decrease job security, causing employees to feel uncertain about how the organization will change and if the newly merged organization will still have a role for them. Concerns over reductions in staffing increase stress and cause job distraction that are generally considered personal costs (Jordan et al., 2002). In contrast, job security offers a peace of mind and would account for positive personal valence.

Even with job security, they may still have uncertainties about how their roles will change. In large-scale M&As, some employees will experience job changes and job retention. These work-life changes are perceived as a cost because of the retooling involved in adapting to their new roles and performance expectations. Contrarily, consistency and stability are likely contributors to employee stability. Leaders must emphasize the benefits to the organization and the individual to improve behaviors and attitudes about the merger and increase the likelihood of merger success (Sung et al., 2017).

Social Identity Theory

Social Identity Theory (SIT) was established to explain employee reactions to their new organizational identity after independent organizations enter a merger agreement (Bartels, Douwes, De Jong, M., & Pruyn, 2006). Merger integration patterns were also studied as a major influence on employee behaviors and attitudes (Giessner et al., 2006; Mottola, Bachman, Gaertner, & Dovidio, 1997). The principles of SIT describe

intergroup differences between merging partners, where employees experience an identity shift from the pre-merger identity to the post-merger identity (Gleibs, Noack & Mummendey, 2010). Literature on SIT will be examined regarding how merger status and merger integration practices influence employee stress.

Some individuals react to mergers by identifying with their pre-merger organization rather than with their new organization (Giessner et al., 2016). Some employees become detached from their work or resign from the organization (Jetten, O'Brien, & Trindall, 2002; Ullrich & van Dick, 2007), which can be detrimental to the success of the merger (Haunschild, Moreland, & Murrell, 1994; Schweiger & Denisi, 1991). SIT asserts that belonging to social groups informs one's self-concept (Giessner et al., 2012; Giessner et al., 2016; Tajfel & Turner, 2004). Mergers are more successful when employees perceive that the legacy organization will benefit from entering the merger, ultimately improving the employee's identification with the new organization (Terry, 2003).

One of the merger activities that play a role in predicting attitudes and behaviors of employees is the re-categorization (status differences) between the partnering organizations (Terry & O'Brien, 2001; Van Dick et al., 2006). In M&As the status differences between merging organizations are based on greater size or economic success of one merging partner over the other (Fischer et al., 2007, p. 205; Giessner et al., 2006). Within the construct of the Social Identity Approach (SIA), the relationship between merger groups is assessed in terms of status, not power or dominance (Gleibs et al., 2008). In some cases, status and dominance may not be related (Van Knippenberg, Van Knippenberg, Monden, & De Lima, 2002).

Social identity strategies. SIT provides strategies for integrating organizations that address matters of social identification, categorization, ingroup bias, intergroup discrimination, and status (Bartels et al., 2006; Ellemers, Spears, & Doosje, 1997; Giessner et al., 2006; Van Leeuwen, Knippenberg, Van, & Ellemers, 2003). The aim of SIT strategies is to achieve positive post-merger identification. It is essential to the cultural growth of the post-merger integration for all employees identify with the new organization (Joseph, 2014). Employee identification with the post-merger organization leads to reduced disagreement, improved motivation and job satisfaction, and organizational citizenship behavior (Giessner, Ullrich, & Van Dick, 2011; Van Dick, et al., 2006).

To maximize social identity, an individual will have a preference for their own group (ingroup bias), while acting unfavorably toward other groups (intergroup discrimination) (Turner, Brown, & Tajfel, 1979). Research concluded that ingroup members act favorably towards each other, and act negatively towards outgroups (Sumner, 1906). Ingroup members generate positive social behaviors within the group because they view each other as more distinctive than outgroup members (Gaertner & Dovidio, 2000). This dynamic was not the case, however, when there was a difference in status or show of dominance. Differences in status between in-groups would lead to anti-outgroup orientations (Haunschild et al., 1994).

Social categorization is the precursor of status disparity and these differences are leading components of intergroup conflict (Joseph, 2014). Status is defined as the level of importance a group holds (Mullen, Brown, & Smith, 1992). In M&As, intergroup status disparities are become prominent even if the differences are not evident in the structure of

authority and leadership (Giessner et al., 2006; Mullen et al., 1992). Being in the high-status group is desirable because the low-status group falls short on providing beneficial social identification (Terry et al., 2001). In an effort to preserve their identity with a higher social groups, prejudice and bias are used to suppress the lower-status groups (Seo & Hill, 2005). Low-status group members will make efforts to reduce their association with the lower status by disconnecting from the low-status group (Turner et al., 1979).

Social identity theory (SIT) promotes intergroup-based strategies to minimize the development of group status issues between merger partners that can hinder integration initiatives through the use of intergroup social interaction, enhancing intergroup permeability, and establishing a new corporate identity (Rouzies & Colman, 2012; Seo & Hill, 2005; Terry et al., 2001). The idea of these approaches to integration is to create a seamless transition from the employee's identification with their prior organization and to establish their new membership within the merging partners.

Continuity is identified at the most effective strategy for organizational identification. Continuity connects with a person's need to maintain some familiar elements of their pre-merger identity (Giessner, 2016, p. 56). Post-merger identification depends on this continuation of pre-merger identity in this case (Rouzies, 2011; Van Knippenberg et al., 2002). Pre-merger identity is reported as having the most significant influence on positive post-merger identification (Bartels et al., 2006).

Merger or Acquisition. Studies concluded that employees of the larger merger partner or acquiring organization have a stronger sense of connectedness to the new organization (Amiot et al., 2006; Van Knippenberg et al., 2002).The challenges merger leaders experience from the acquired side of the merger can be surmounting. Leaders

who experience being acquired may face more challenges adapting to the relationship than the acquiring leaders (Fischer et al., 2007). Leaders with a mindset of having a disadvantage become more stressed as they may feel threatened (Terry & Callan, 1998) or sense of unfair treatment (Giessner et al., 2006; Terry & O'Brien, 2001). Although a merger may be stressful for both organizations, the leaders from the smaller-scaled organization will likely experience more negative responses in comparison to leaders from the other larger partnering organizations (Fischer et al., 2007). Leaders who create a merger environment where employees have equal access to training, compensation, and other perceived benefits, then stressors are reduced and employees feel supported, respected, and have an improved ingroup identity (Gaertner, Bachman, Dovidio, & Banker, 2001).

In Table 2, Giessner et al. (2016) suggested leadership strategies for promoting opportunities for increased identification with the merged organization that are likely to result in better adaptability to the merger. Employees should be given tools to help them thrive in the new organizational environment through assessment and training on stress management, resolving conflict, and organizational culture (Giessner et al., 2016).

Table 2

Identity management: Key Antecedents to Merger Adjustment

Identity Processes	• Plan investments to manage human resources during the merger • Invest time and resources into the smaller partnering employees • Monitor levels of post-merger identification (e.g., employee surveys) in order to adjust intervention strategies • Tailor communication strategies for different change recipients. Invest heavily into communication with employees who are more strongly affected by the merger. Invest in bottom-up communication channels that enable employees to voice concerns • Facilitate the emergence of a positive transitional and future identity by promoting shared labels and positive collective visions of the new merged organization. • Provide more autonomy to HR managers during the integration phase so that they can manage employee uncertainty and adjust their communication and training efforts in flexible ways.
Intergroup Structure	• Ensure employees from the newer/smaller partner gain access to valued resources (e.g., career opportunities, developmental training, etc.), but not at the cost of employees from the dominant organization • Ensure merger implementation plan provides concrete logistical information regarding responsibilities, staff positions and other structural conditions.
Justice and Fairness	• Engage in informal interactions with employees and ensure timely and honest feedback • Ensure that communication is fair and consistent for all employees • Allow managers from both organizations to participate in discussions and executive meetings • Give formal responsibilities to employees and managers from both partner organizations

Table 2 (continued)

Identity management: Key Antecedents to Merger Adjustment

Leadership	• Ensure the management team is structured in a way that provides adequate representation of both organizations • Communicate visions that provide a sense of continuity or that inspire employees with a positive vision of the merged organization • Top and mid-level leaders should show group-oriented behavior especially toward members of the partner organization • Initiate interventions aimed at supporting mid-level leaders

Effective use of the strategies in Table 2 produces "permeable boundaries" between merging partners; reducing negativity and fostering social mobility and acceptance of the merger (Giessner, 2016, p. 62). In a study of 465 employees during an airline merger showed that employees of the acquired organization identified better with the post-merger organization and demonstrated high emotional health when they experienced permeability and social mobility in the merged organization (Terry et al, 2001). Leaders are under stress with the above identity management expectations (Table 2) to manage employee resistance, demonstrate a sense of continuity, and provide group-oriented behavior (van Dijk & van Dick, 2009; Giessner, 2016). If the leader is considered an out-group member by the employees of the merger partner, this can create disadvantages, therefore the leader must adapt their behavior. The degree to which the leader effectively copes with this stress and demonstrates the mental agility to adapt to the needs of the legacy organization and the post-merger partner will, in part, be related to the leader's application of emotional intelligence skills.

Merger integration pattern. Marks and Mirvis (1998, 2001) stated that the social identity of merging partners is also influenced by the type of merger integration patterns: *absorption* (assimilation of one organization's culture into another organization's culture), *transformation* (a new organizational structure and identity), *best-of-both (*an integration of features from both merging partners), preservation (where the partners maintain cultural independence and autonomy), and r*everse* mergers (although rare, the larger acquiring partner assimilates to the smaller acquired organization's culture). The merger pattern and the degree of change determine the how much of an adjustment employees must make. These changes can lead to heightened merger stress and poorer physical and psychological health (Cartwright et al., 2007; Giessner et al., 2016).

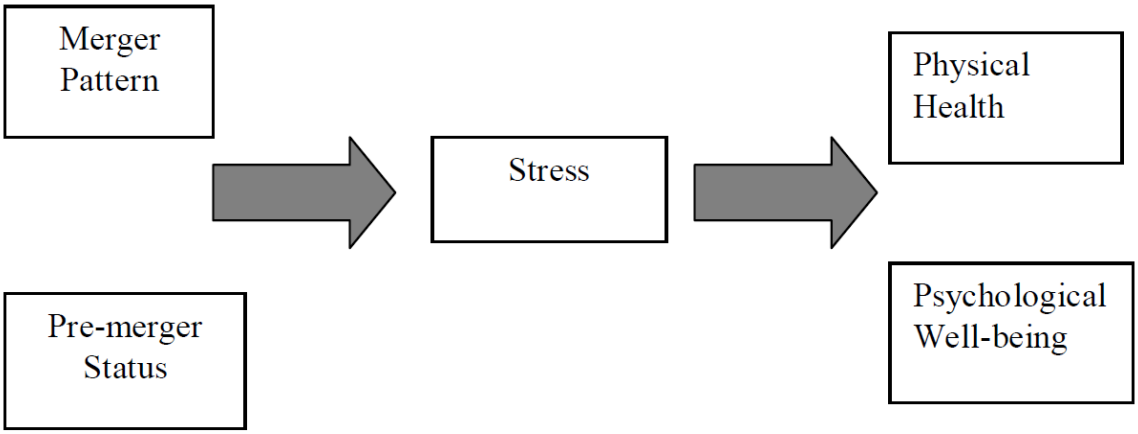

Figure 1. Model describing the effects of intergroup-level variables (pre-merger status, merger integration pattern) and stress on physical health and psychological well-being after merger (Makri, 2012, p. 119).

Although there is no determined best way to merge, the transformation merger pattern allows for distribution of power among merging partners and is mostly likely to alleviate merger-related stress (Giessner et al., 2006; Wickramasinghe & Karunaratne, 2009).

Effects of Merger Stress

Organizational mergers can have a negative effect on the psychological health of employees, causing them severe stress (Panchal & Cartwright, 2001; Schweiger, Ivancevich, & Power, 1987). Stress over job insecurity and uncertainty about the merger could lead to other personal anguish (Buono & Bowditch, 1990; Fried, Tieges, Naughton, & Ashford, 1996). The effects of merger stress can be compared to the frustrations of a child separated from a parent (Schweiger et al., 1987). Anxieties arise over differences in organizational cultures, fear of restructuring, and job reassignment or loss. Panchal and Cartwright (2001) found that merger stress causes employees to feel devalued from loss of authority or rank. A heightened sense of stress for leaders is in part due to the reduction of redundant positions which may result in the elimination of top-level leaders; up to 60% turnover of executives in some acquisitions (Walsh, 1988, p. 177). Research conducted by Sedlacek & Valouch (2018) concluded that mergers that result in acquisition have a better employee response and higher success rate because employees are positively responsive to "finishing" the merger process versus being in a long term transitional state of a merger (p. 397).

Conflicting opinions on merger stress. There are various research findings regarding pre/post-merger status of merging organizations. Amiot et al. (2007) showed that employees of the acquired organization adjusted poorly to the merger and perceived the merger as more stressful than the acquiring partner. However, other studies showed that the status of the organization (acquired/acquirer; larger/smaller) is not always a problem. When all employees of the merging organizations gained equal access to resources and benefits from the more robust organization, they experience reduced stress

(Panchal & Cartwright, 2001). Terry et al. (2001) also concluded that status as the acquired or the acquirer had no impact on stress levels. There are also opposing perspectives on the value of retaining leaders from the legacy organization versus installing of a new leadership team and the impact on leader performance and merger success, which is based on multiple variables (timing, size of the organizations, and merger pattern) (Krug, et al., 2015).

In consideration of the many variables mentioned above that influence merger leadership success, it calls into question how much focus is dedicated to the nurturing of leaders, whether their tenure with the organization is short or long term? Survivors of a merger are likely to experience moments of fragility along with the joy of accomplishment as they ride the wave of merger strategy deployment. With major organizational transformation on the agenda for the next few years, it makes sense to monitor and validate the attitudes and stress levels of leaders. These human factors are also in transition as the merger transitions through its phases. Emotional intelligence can be incorporated into a leader's coping abilities and developed as a moderator of stress management and adaptability to new circumstances, especially during a merger which requires leaders to operate situationally from day to day.

Chapter Three: Method

Efficiencies and reductions in blood utilization in hospitals had a trickledown effect on business relations between hospitals and blood centers, specifically, on the cost of providing such a vital resource as blood. Hospitals and patients rely on blood centers to sustain the blood supply in local communities. Without local blood suppliers, the alternative for hospitals will be to enter new partnerships, risking higher costs to maintain adequate blood inventory levels (Carden & DelliFraine, 2005). The Centers for Medicare & Medicaid Services (2017) published proposals for decreases in blood component reimbursement rates as drastic as 46% for 2018 from 2016. In response to lower reimbursement rates, changes in healthcare policy, blood demand, and production costs, blood center leaders must reassess their operational capacity and develop strategies for staying viable in a volatile healthcare industry. Dr. Rita Reik, Chief Medical Director of a Florida blood center commented that reduced blood utilization by hospitals has created competition between blood centers that keeps them from working collaboratively, yet drives the acquisition and merger activity that is now more prominent (America's Blood Centers, 2017).

Mergers are high stakes investments where the financial success of the merger gains most of the attention. This study will attempt to shed light on EI as a vital capability of merger leaders as they guide their organization along a new operational path that will require savvy social skills and emotional regulation to maneuver a complex phase in the organization's new life cycle. Merger success and failure are attributed to either strategic

fit between the merging organizations or the leader's navigation of sociocultural issues during the integration phase (Bommaraju et al., 2018).

This study assessed the emotional intelligence of merger leaders in regard to their level of stress management and then drew inferences as to how scores in overall stress management, stress tolerance, and flexibility influenced day-to-day immersion in merger activity. EI is vital to a leader's ability to manage stress under the daily challenge to adjust and respond to internal and external stimuli (Nizielski et al., 2013; Bar-On et al., 2007). Challenges with social identity and a loss of autonomy can lead to heightened merger stress and reduced physical and psychological health (Cartwright et al., 2007; Giessner et al, 2016). Lack of attention to leaders' levels of adaptability and stress coping skills during a merger could leave leaders defenseless to events that can provoke negative feelings and actions that could create personal and social challenges, thus, poor merger leadership effectiveness. This study examined to which EI was associated with better stress coping and adaptability of leaders during the implementation of a merger. Without assessment of EI tools, leadership functions may succumb to the pressures of the merger and the new organization could be at risk for merger failure.

The research questions and hypotheses are as follows:

RQ1. What relationship exists between leaders' overall EI score and their stress management scale score?

$H1_o$: There is no relationship between the overall EI score and the stress management scale score.

$H1_a$: There is a relationship between the overall EI score and the stress management scale score.

RQ2. What relationship exists between a leader's self-perceived ability to tolerate merger-related stress as described in a qualitative interview compared to the stress tolerance score measured by the Emotional Intelligence-Inventory 2.0 (EQ-i 2.0)?

$H2_o$: There is no relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

$H2_a$: There is a relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

RQ3. What relationship exists between a leader's self-perceived ability to adapt to merger-related stress as described in a qualitative interview compared to their flexibility score on the EQ-i 2.0?

$H3_o$: There is no relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

$H3_a$: There is a relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

RQ4. What relationship exists between the overall stress management score of leaders from the larger blood center and leaders of the smaller-sized partnering blood centers as measured by the EQ-i 2.0?

$H4_o$: There is no difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized blood centers.

$H4_a$: There is a difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized partnering blood centers.

Topics covered in this chapter include a discussion of participant selection, a detailed discussion of the instrumentation, and description of the procedure for data collection. The study variables will be defined, followed by a justification for the selected research design, and an analysis of the data. Finally, the chapter will conclude with a statement of study limitations.

The rationale for this study stems from the need to address the human side of a merger by taking a closer look as to how EI plays a vital role in the way leaders carry out the charge to execute a merger. Early research by McKaye (1928) advanced the study of the interrelation of emotion and intelligence arguing that this interplay has a major influence on behavior, performance, attitude, and regulation of emotional and social stability. Bradberry and Greaves (2005) conducted research that concluded that leaders with elevated EI had a 20% higher productivity rate in relation to job performance. Ozcelik et al. (2008) showed that leaders who exhibited high EI skills had increased revenue and strategic growth, and achieved organizational goals, which is relevant to literature that discusses the ineffectiveness of most mergers to reach strategic goals set forth in the merger agreements (Fischer et al., 2007; Kell & Landsberg, 2005; Sedlacek & Valouch, 2018). Additionally, attaining organizational goals was more likely when the leader incorporated their EI skills into the management of those they supervised. Jafri et al. (2016) assert that employees with higher EI have a higher capability to think differently, weigh situational options, and generate new ideas. EI capabilities are essential

for merger leaders who are looking for creative ways to keep their organizations viable in a changing blood industry climate.

Participants

A population of 89 leaders represented four blood centers that entered in a four-way merger across four states in the Midwestern United States. Each blood center entered the merger having its own culture and practices although they all served the same mission. A total of 82 leaders completed the online assessment and after adjusting for exclusionary criteria, data from a sample of 78 leaders will be analyzed. The study participants were organizational leaders who served in roles from department heads to C-suite leaders. Leaders had oversight of local and/or virtual teams. There were combinations of solid and dotted line reporting structures. Some leaders had accountability in one or more states. Some leaders had accountability in all four states.

The Chief Human Resources Officer identified the leaders in the organization who met the criteria to participate in the study. Exclusionary reasons that limited participation in the study included leaders who had participated in an unrelated emotional intelligence workshop a few months prior to the start of this study. New leaders with less than 90 days of employment in the organization and leaders with less than 90 days in a leadership role were also excluded. Reasoning for the exclusion of leaders who were new to the organization is that they would not have the same experience as those leaders who experienced the merger as a member of one of the legacy blood centers. Leaders who were new to their role within 90 days of starting the study would not have been decision-maker or process owner to relate to the context of the interview questions that focused on the early stages of the merger. Only participants who completed the online assessment

were eligible to participate in a personal interview. The researcher was the main point of contact for this study. Participants were contacted via email invitation to complete an online assessment and personal interview.

Instrumentation

Bar-On's (1997; 2005) model of EI is a range of related emotional and social competencies that determine an individual's effectiveness at understanding and expressing themselves, understanding and interacting with others, and coping with daily demands and challenges. The theoretical foundation of the model is comprised of five key factors: 1) *intrapersonal capacity* (awareness and understanding of oneself and emotions and to express one's feelings and ideas); 2) *interpersonal skills* (the ability to be aware of, understand and appreciate others' feelings and to establish and maintain mutually satisfying and responsible relationships with others); 3) *adaptability* (the ability to verify one's feelings with objective external cues and accurately appraise the immediate situation. Flexibility to alter one's feelings and thoughts with changing situations, and to solve personal and interpersonal problems); 4) *stress management* (the ability to cope with stress and control strong emotions); and 5) *general mood factors* (the ability to be optimistic, to enjoy oneself and others, and feel and express positive feelings) (Bar-On, 1997).

This model provides the basis for the emotional quotient inventory (EQ-i) instrument that was developed to assess EI. Emotional intelligence tools are categorized as ability-based, trait-based, or mixed-model methods. Ability-based models measure EI based on skills performance. Trait-based models measure perceived ability through self-assessment (Petrides & Furnham, 2001; Brackett & Geher, 2006). The EQ-i 2.0, a trait-

model, was developed to capture self-perceptions and emotional abilities (O'Boyle et al., 2010; Petrides et al., 2007). This model is appropriate for this study because stress is perceived differently and is subject to the individual's personal experiences and beliefs about stressors and how to adapt psychologically in stressful environments.

Trait, Ability and Mixed-Model Measurements

There are different constructs of EI based on the manner of measurement (Schutte, et al., 1998; Brackett & Geher, 2006). EI can be categorized as trait, ability, or mixed-model measurement. Although there are distinctions between these models, there is overlap.

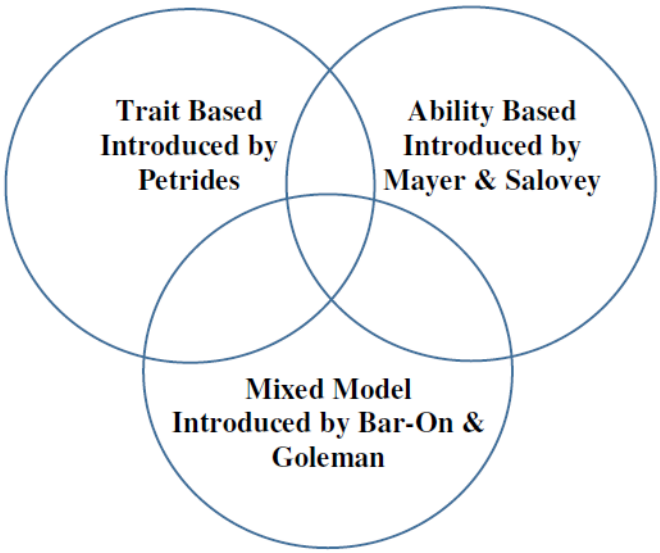

Figure 2. Overlapping constructs of emotional intelligence. Adapted from "Emotional Intelligence, Job Satisfaction, and Burnout for Dietitians," by Cara N. Perdue, 2016, p. 23. Copyright 2016 by ProQuest.

Ability-based EI. The ability-based model is considered the foundation for the modern development of EI (Codier, Muneno, Franey, & Matsuura, 2010; Maul, 2012;

Mayer & Cobb, 2000; Seal & Andrews-Brown, 2010). Ability-based models measure EI as mental abilities or skills that inform processing of "emotion-relevant information" (Brackett & Geher, 2006). These performance-based measures analyze reactions that a person has to emotions. This model has flaws because it is subjective in nature, therefore, reliability issues may be of concern (Brannick et al., 2009; Killian, 2012). Additionally, are concerns about limited indicators used to determine EI level (Maul, 2012).

Trait-based EI. Trait-based EI was originally introduced by Petrides and Furnham (2006). Trait-based measurements analyze EI in terms of emotional perceptions and personality hierarchies. Trait-based models rely on self-assessment of one's abilities, skills, competencies, and personality traits related to EI (Petrides, et al., 2007). With trait-based EI being so closely linked to personality it may difficult to assess EI independently from personality, resulting validity concerns (Mikolajczak, 2009). Potential flaws include vagueness and combinations of personality components within the scope of EI. This creates concern that trait-based measures may not measure EI, but other personality constructs (Brannick et al., 2009; Killian, 2012). Also, with self-assessments, fakability is high, which raises further concerns about reliability (Grubb & McDaniel, 2007). It can also be a challenge for researchers to know if responses are genuine (Mayer, Salovey, Caruso, & Sitarenios, 2001).

Mixed-model EI. According to Seal & Andrews-Brown (2010) the mixed-model measurement of EI is based on emotional competence and behaviors. Other EI theorists also assert that EI is a mixture of trait and ability measures (Bar-On, Tranel, Denburg, & Bechara, 2003; Birks & Watt, 2007; Doherty, Cronin, & Offiah, 2013; Goleman, 1995; Mikolajczak, 2009). Bar-On's (2006) model of Emotional-Social Intelligence is an

example of a mixed-model construct that is a self-reported assessment of emotionally and socially intelligent behavior. Bar-On's mixed-model EI measurement also has validity issues, as with the ability and trait-based models (Conte, 2005; Schutte et al., 1998).

Currently, there is no evidence that suggests a correlation in how trait and ability-based models are scored (Brannick et al., 2009; Karim, 2010). The discrepancy between measurement models may be due to the complexity in the way emotions occur, their expression, and variability in interpretation (Clarke, 2010; Mayer et al., 2008; Mayer et al. 2001). Although different philosophies of EI models exist, they are all are complementary with common themes (Ciarrochi, Chan, & Caputi, 2000; Mikolajczak, 2009). Caruso (2003) suggested the ability-based model of EI as the unified approach to reduce confusion around EI.

Scoring the Questionnaire

Because of the subjective nature of this study calling for leaders' to attempt to identify the causes of merger stress and explain their perceptions of stress in relation to their ability to effectively lead an organization through a merger, the EQ-i, 2.0 self-assessment was administered to tease out those common traits of effective merger leaders. The EQ-i 2.0 is an online, self-report, 133 item assessment requiring approximately 20 minutes to complete (Multi-Health System, 2011. The EQ-i 2.0 has one overarching EI score, broken down into five composite scores, which are then broken down into 15 subscales (see Appendix A). The response options are on a five-point Likert scale ranging from *Rarely/Almost never* (1) to *Always/Almost always* (5). Scores are computer-generated. Raw scores are automatically tabulated and converted into standard scores based on a mean of 100 and standard deviation of 15. Average to above-average

EQ scores on the EQ-i suggest that the respondent is effective in emotional and social functioning. The higher the scores, the more positive the prediction for effective functioning in meeting daily demands and challenges. Conversely, low EQ scores indicate a lack of effectiveness and the possible existence of emotional, social and/or behavioral difficulties (Bar-On, 2006). The EQ-i has a built-in correction factor that adjusts the scale scores based on scores obtained from two of the instrument's validity indices (Positive Impression and Negative Impression). This is an important feature for self-report measures because it reduces the potentially distorting effects of response bias, therefore, increasing the accuracy of the results (Bar-On, 2006).

Reliability

The reliability of the Bar-On EQ-i has been examined by many researchers showing that the Bar-On conceptual and assessment model is consistent, stable and reliable over time (Bar-On, 2004; Davies et al., 1998; Matthews, Zeidner, & Roberts, 2002; Newsome, Day, & Cantano, 2000; Petrides & Furnham, 2000). Specifically, the overall internal consistency coefficient of the EQ-i is .97 based on the North American normative sample (Bar-On, 1997). The consistency coefficient of .97 exceeds the .90 minimum for total scores (Nunnally, 1978). Internal consistency was re-examined on 51,623 adults in North America, resulting in almost identical results with a mean increase of .025 in consistency coefficients (Bar-On, 2004). An overall retest reliability examination of the EQ-i is .72 for males (n=73) and .80 for females (n=279) at six months (Bar-On, 2004).

Validity

Construct validity is the extent to which an instrument is measuring what it is designed to measure. Findings show that the EQ-i has the least amount of overlap with cognitive tests, yet a greater degree of overlap with personality tests. The greatest degree of domain overlap occurs between the EQ-i and other EI measures (Bar-On, 2006). To examine this variance of the Bar-On model, the EQ-i was administered with various measures of cognitive intelligence (including the Wechsler Adult Intelligence Scale, Progressive Raven Matrix, and the General Adult Mental Ability Scale) to a total of 4,218 individuals in six studies (Bar-On, 2004). The results indicated that there is minimal overlap between the EQ-i and tests of cognitive (academic) intelligence, which was expected since the EQ-i was not designed to assess this type of performance. Van Rooy and Viswesvaran (2004) confirmed this finding by concluding that no more than 4% of the variance of the EQ-i can be explained by cognitive intelligence according to a meta-analysis including 10 studies (n>5,000).

Additionally, to provide insight to the construct validity of the Bar-On model and measure of EI, findings indicate that EI and cognitive intelligence are separate, unrelated constructs (Bar-On, 2004; Van Rooy & Viswesvaran, 2004). There is neurological evidence which suggest that the neural centers governing EI and those governing cognitive intelligence are located in different areas of the brain. The ventromedial prefrontal cortex governs basic aspects of EI (Bar-On et al., 2003; Bechara & Bar-On, 2006; Lane & McRae, 2004), while the dorsolateral prefrontal cortex is thought to govern key aspects of cognitive functioning (Duncan, 2001). Further support that EQ-i does not measure personality traits is that the 15 emotional and social competencies, skills, and

facilitators that it measures (a) increase almost continuously from childhood to the end of the fourth decade of life, and (b) they can be significantly increased as a result of training (Bar-On, 2003, 2004). Personality traits are not as susceptible to influence.

The degree of overlap between the EQ-i and other measures of EI is nearly twice as that explained by personality and cognitive intelligence combined. In 13 studies in which a total of 2,417 individuals participated, the degree of domain overlap between the EQ-i and other measures of EI is about 36%, which is substantial when evaluating construct validity (Anastasi, 1988). When compared with a 4% overlap with IQ tests and a 15% overlap with personality tests, it is obvious that the EQ-i is measuring what other EI measures are measuring rather than cognitive intelligence or personality traits. Empirically demonstrating this point dispels assumptions regarding the Bar-On conceptual and psychometric model that was based on less extensive and conclusive findings (Brackett & Mayer, 2003; Matthews et al., 2002; Newsome et al., 2000).

Predictability

The Bar-On model is capable of predicting various aspects of human behavior, performance, and effectiveness. Twenty predictive validity studies were conducted on 22,971 individuals who completed the EQ-i in seven countries which provided evidence for the ability of the EQ-i to predict performance of social interactions in the workplace, as well as its impact on psychological health (Bar-On, 1997, 2001, 2003, 2004, 2005; Bar-On, Handley, & Fund, 2005;). Based on these findings, the average predictive validity coefficient is .59, which suggests that the Bar-On model is able to predict various aspects of human performance. In a study that included a sample of 2,514 males who completed the EQ-i at the time of their induction into the Israeli Defense Forces, 152

were eventually discharged for psychiatric reasons (2003). Then a new group was selected. One hundred fifty-two males among 241 who were diagnosed with less severe psychiatric disturbances that allowed them to continue their tour of duty with relatively few limitations. The EQ-i scores of these two groups were compared with a randomly selected group of 152 recruits within the same population sample (n=2,514) who did not receive a psychiatric profile during the entire period of their military service. This created three groups representing three different levels of psychological health: a) individuals who were so severely disturbed that they were incapable of serving a full tour of duty, b) individuals who received less severe psychiatric profiles which allowed them to continue active military service until completion, and c) individuals who completed their military service without having received a psychiatric profile.

A multiple regression analysis was applied to examine the degree of impact of EI on psychological health; the results revealed a moderate yet significant relationship between the two (.39). Findings from these studies suggest that the most "powerful" EI competencies, skills, and facilitators that impact psychological health are a) the ability to manage emotions and cope with stress; b) the drive to accomplish personal goals and lead a more meaningful life, and c) the ability to verify one's feelings and thinking (Bar-On, 2006, p. 13). Bar-On (2006) asserted that the findings make sense because deficiencies in these competencies may lead to anxiety (an inability to adequately manage emotions), depression (an inability to accomplish personal goals and lead a more meaningful life), and problems related to reality testing (an inability to adequately verify feelings and thinking), respectively.

Bar-On (2004) and Bar-On et al., (2005) also studied leadership in the Israeli Defense Forces by examining the relationship between EQ-i scores and peer-nomination (those considered to possess leadership capacity among new recruits), criterion group membership in another study, Israeli Defense Forces recruits who were accepted to officer training versus those who were not) and multi-rater evaluations in a third study which was conducted at the Center for Creative Leadership in the US. The results indicated, respectively, that there is a moderate to high relationship between EI and leadership based on the predictive validity coefficients of .39 (n=536), .49 (n=940) and .82 (n=236) that were revealed. The third study shows that successful leadership is based to a large extent on emotional-social intelligence; approximately two-thirds (67%). The findings suggest that the most powerful EI contributors to occupational performance are: (a) the ability to be aware of and accept oneself; (b) the ability to be aware of others' feelings, concerns, and needs; (c) the ability to manage emotions; (d) the ability to be realistic and put things in correct perspective; and (e) the ability to have a positive disposition. Based on the findings presented here, the EQ-i compares favorably with other EI measures in predicting occupational performance.

Qualitative Interviews

A sample of leaders who completed the online assessment were invited to take part in a semi-structured interview. The interview was comprised of a series of 11 open-ended questions that were developed to align with the items in the online assessment that related to stress management, stress tolerance, and flexibility scores. The questions were developed to specifically inquire about the study variables of stress and adaptability. Each participant was presented with the same list of questions and asked in the same

sequence. The questions were developed to foster an open dialogue with detailed descriptions and explanations of the quantitative responses in the context of their merger experience.

Procedure

The first phase of data collection involved administering a quantitative assessment, the EQ-i 2.0. Participants were emailed a link to the online assessment with pre-reads that included a definition of emotional intelligence, a statement of confidentiality, and an electronic consent. The electronic consent was also an invitation to participate in a qualitative interview. Instructions were provided to complete the questionnaire in one sitting and to avoid distractions during the assessment. Participants were informed that the assessment would take approximately 20 minutes to complete and link will be active for two weeks. At the end of the first week, an email reminder was sent to complete the survey. A second email reminder was sent two days before the close of the survey.

To alleviate risks to confidentiality, all electronic assessments were stored and password protected on a secure external server with a third party administrator who has no vested interest in the results of the study. No hard copies of the assessments were maintained by the researcher.

Participants who completed the EQ-i 2.0 assessment were randomly selected to take part in a qualitative interview. The number of participants was dependent on the number of completed surveys. Prior to selection, the participants were sorted by the state where their blood center was located. Each state was assigned an alphanumeric code. Within each state, the leaders were coded with a number that coincided with the order

their assessment was completed (not alphabetized). Leaders were selected from each state using a random number generator. In states where the number of leaders was unbalanced in relation to the other states, a new leader was randomly selected to participate until the sample pool was balanced or exhausted. Then a convenience sampling of interview participants was conducted to balance the sample pool. Bryman (2008) posited that convenience sampling "is a sample that is selected because of its availability to the researcher" (p. 692).

The researcher reserved a conference room to conduct personal interviews. When the interviews were scheduled, the calendar invite was set as private to maintain participant confidentiality. Each session held in the conference room was and recorded with an mp3 voice recorder. Some interviews were conducted via virtual meeting software. The audio and video files were recorded and saved via the meeting software cloud storage**.** Participants were not required to travel to take part in the interview. Interviews lasted from 20 minutes to an hour. Prior to beginning the interview, the researcher talked through the Research Participant Consent Form and provided an opportunity for questions or comments. Confidentiality of responses was explained, and the participant were notified of their option to discontinue the interview at any time. All study data (hard copy or electronic) will be retained for a minimum of three years after the close of the study by the principal investigator. The audio files were named according to the alpha numeric state-participant code that was generated during the random selection process.

Variables

The dependent variable in this study was stress, and the independent variable was emotional intelligence. The five scales and 15 subscales of the EI model are the mediating or intervening variables that make up the overall EI score. For this study, the Stress Management scale (with subscales of Stress Tolerance and Flexibility) was measured to help explain differences in how leaders describe their merger leadership experience. The specific selection of the stress management scale with subscales of stress tolerance and flexibility as study variables were selected to explore assertions that there must be a balance in managing operational and emotional aspects of a merger (Marks, 2006). Merger leadership and gaps related to the emotional aspect of a merger were referenced in the literature on stress and adaptability more so than the other subscales in the EI model. Both variables are essential for leaders to maintain their personal well-being in changing environments.

Research Design

The purpose of this study is to give attention to challenges leaders face as they maneuver through an organizational merger and explore if the stress of a merger impacts leaders emotionally, and if so, how they adapt and tolerate stress in the workplace. Assessing leaders' ability to regulate their emotions and manage stress provides a view into the health of the organization and their perception of merger-related stress. This study will examine the EI of leaders of four integrated blood centers, all with the same mission, but each with unique practices, cultures, and strategies for serving their mission.

The study is characterized as a mixed-methods case study. In a case study, an event (leaders in a merger in this case) is studied for a set time period to gain insight into

a poorly understood practice or situation, at times between two or more cases to make comparisons, build theory, or to make generalizations (Leedy & Ormrod, 2013). Creswell and Plano Clark (2011) asserted that mixed-methods research is a combination of methods, a philosophy, and a research design orientation that highlights keys components that comprise a mixed-methods study. The six key components that characterize a mixed-methods study are:

1. Collecting and analyzing persuasive and rigorous qualitative and quantitative data.
2. Integrating the two forms of data by combining them sequentially by having one build on the other or embed one within the other.
3. Prioritizing one or to both forms of data.
4. Using these procedures in a single study or in multiple phases of a study.
5. Framing these procedures within the philosophical worldviews and theoretical lenses.
6. Combining procedures into a research design that directs the plan for the study. (Creswell & Plano Clark, 2011, p. 5)

There are multiple aspects of mixed-methods research that make this approach the most effective for conducting a case study. One benefit of a mixed-methods approach is that triangulation of the findings adds greater validity in that the finding may be mutually supported by both quantitative and qualitative data. Potential weaknesses of either method can be offset by combining and drawing from the strengths of both methods to enhance the integrity of the findings. Mixed-methods research allows the findings of one research method to possibly be explained by the other method. Finally, qualitative

research allows for better development of the context and further insight into the quantitative research (Bryman, 2008).

Because this study involved the clarification of what was perceived as a stressor and what influenced leaders' ability or willingness to be flexible, the mixed-methods approach provided enlightenment to the survey response by delving into the story behind the responses. A mixed-methods approach helped further explore a merger through the lens of a leader using a self-assessment and then learning about each leader's experience through a qualitative interview. Conclusions drawn about the population from the survey were compared to the qualitative responses to find alignment between the two research methods. The qualitative portion also provided responses that may not have been captured in the survey, which led to different conclusions about the population. Because the merger experience is so subjective, the mixed-methods approach allowed for all detailed perspectives to be considered factors in a leader's perception of a merger. Furthermore, expressions of positive or negative sentiment were captured with very specific descriptions instead in being limited to the available choices on the survey. Conducting research from both approaches helped draw out specific themes that may be generalizable beyond the sample population or maybe limited to only subcultures within the sample.

Data Analyses

This study focused on leaders' perceived ability to manage stress and adapt to a four-way merger. Responses were collected from the EQ-i 2.0, specifically in regard to the Stress Management scale, the Stress Tolerance and Flexibility subscales. Responses were also collected from a subsequent qualitative interview. Once the EQ-i scores were

obtained, the subscales scores were compared to the overall scores to find a relationship. SPSS 26 was used to perform descriptive statistics and other statistical tests appropriate for the study. The Shapiro-Wilk was run to test for normality. Statistical testing for Hypothesis 1used a linear regression analysis to determine relationship between the results of the overall EQ score and the stress management scale score. A regression analysis was run to provide a predictive value about whether leaders with high EQ cope with stress more effectively in a merger than leaders who do not score high in overall EQ. Regression analysis was run to gain any predictive insight to the directional movement of the dependent variable values based on the independent variable values (Cronk, 2012). A correlation matrix of significant *r* values was conducted to gain an overview of the *r* value relationships**.** A Pearson correlation coefficient was calculated for Hypotheses 2 and 3. This test attempts to establish relationship strength between variables, not causality. Leedy and Ormrod (2013) asserted that when performing correlational research, "correlation does not, in and of itself, indicate causation" (p. 187). Correlation testing for Hypothesis 2 will examine if the data reveal a strong positive relationship between the qualitative, self-described ability to manage stress and the stress tolerance score measured by the EQ-i 2.0. Correlation testing for Hypothesis 3 examines if the data show a strong positive correlation between the qualitative, self-described ability to adapt to merger-related stress and the flexibility score measured by the EQ-i 2.0. A *t*-test was run for Hypothesis 4 to determine if there was a significant difference in stress management scores between the leaders of the larger organization and leaders of the smaller organizations. Calculating an Independent-Samples *t*-test compared the mean scores between the larger and smaller organizational groups within the sample.

Given the population of 89 leaders for this study, the required sample population was 72 to provide enough statistical power to reach significance. To calculate the sample size for the inferential statistical analyses, a G*Power analysis was conducted in a similar study where the sample population was n=60 (Perugini, O'Gorman, & Prestwich, 2007). With alpha (α) =.05 and beta (β) =.8, the actual power = .838477 for regression analysis and an increased actual power =.906347 for *t*-test (Faul, Erdfelder, Buchner, & Lang, 2009, p. 1155). An appropriate sample size will help avoid both Type I and Type II errors (Banerjee, Chitnis, Jadhav, Bhawalkar, & Chaudhury, 2009). Type I errors are associated with false positives where the researcher rejects a null hypothesis that is actually true in the population. Type II errors are associated with false negatives where the researcher fails to reject a null hypothesis that is actually false in the population. Power (1- β) is the probability of observing the specific effect in the sample.

Recorded qualitative data from the semi-structured interviews was analyzed using NVivo 26 CADQA software. The data was queried and analyzed through narrative and thematic coding of interview transcripts to display nodes and themes that suggested a relationships between data (QSR International, n.d.). The frequency of relevant words or phrases were counted and evaluated based on context, which helped identify emergent themes. Member checking and consensual validation was performed to clarify the interpretation of the transcripts, confirm positive or negative sentiment, and to check for gaps and bias (Bazeley, 2013). Member checking or respondent validation is a strategy for ensuring the quality of the results, which involves seeking agreement from the participants or other colleagues about the conclusions drawn (Bazeley, 2013). These themes were analyzed to establish triangulation of the qualitative responses with the

quantitative surveys. Additional demographic information will be collected at the beginning of the interview to further drill down frequency of variables.

Limitations

In one study of mergers (Joseph, 2014), research conducted after the two year premerger-to-post-merger phase yielded a willing study sample of employees who had experienced various stages of the merger and who demonstrated adequate recall of their merger experience. Beyond the first year of integration (years two to three), the willingness of participants decreased or employees who experienced the merger had left the organization. One limiting factor of the study is that the available population of leaders across the four blood centers participating in the study could fluctuate as a result of restructuring.

Another factor impacting the study is that the organizations participating in this study have begun the cultural integration phase, including the internal renaming of the organizations to identify as one entity, instead of four organizations. Therefore, newer leaders hired externally may only identify with the new organization; not having experienced the phenomenon of dissociating from the old culture to adapt to the new culture as a result of the merger (as did leaders who experienced the internal cultural transformation). With this in mind, responses for flexibility on the EQ-i 2.0 (in relation to adaptability) may be contextually skewed. It is understood that new external leaders make adjustments but do so in a general sense in a new organization, different from leaders who must unlearn organizational routines and culture (that they may have established) to adopt a new mindset. Another limitation is that some leaders of virtual teams may not associate with one particular blood center and may not relate to the "us-

them/we-they" syndrome that surviving leaders may have experienced, thus the relationship of EI in regard to leader geographic location may not apply to some virtual leaders.

Additionally, low participation limited the diversity of perspectives in some states. The original intent of the researcher was to interview five leaders from each state (20 total) to capture multiple perspectives from each location and job level. Low participation also limited views from each job level. The lack of replies can be attributed limited availability on leaders' calendars during the time frame when the qualitative interviews were taking place. Also, a lack of interest in the study was a likely limiting factor due to the three month time period between the completion of the online assessment and the qualitative interview sessions. An additional limitation is that one interview session was documented by handwritten notes. Handwritten notation does not capture the full dialogue, and there could be a limited recall of details such as specific experiences, vocal tone, and body language.

Summary

This chapter was a discussion of the study method. A description of the study participants was provided with criteria for participation. The instrumentation was explained, including its reliability, validity, and predictability. The procedures for capturing informed consent and data collection were detailed. An explanation of data analysis software and statistical tests was provided along with comments about ensuring the integrity of the qualitative data.

Chapter Four: Results

The purpose of this study was to examine emotional intelligence (EI) of leaders involved in a multi-state merger to gain insight about EI as facilitator of stress coping and adaptability. The results of the data collected for this study revealed the degree to which stress tolerance and flexibility were influenced by overall EI performance. Emotional intelligence scores (EQ) and perceptions shared among leaders who flourish under the pressures of a merger were explained. Conversely, negative perceptions of the merger were fleshed out to identify common issues that are potential derailers for merger leaders.

This mixed-methods study used the EQ-i 2.0 to obtain quantitative emotional intelligence scores and used semi-structured interviews to engage leaders in thought provoking dialogue about emotions and behaviors associated with their merger experience. The research questions and hypotheses are as follows:

RQ1. What relationship exists between leaders' overall EI score and their stress management scale score?

$H1_o$: There is no relationship between the overall EI score and the stress management scale score.

$H1_a$: There is a relationship between the overall EI score and the stress management scale score.

RQ2. What relationship exists between a leader's self-perceived ability to tolerate merger-related stress as described in a qualitative interview compared to the stress tolerance score measured by the Emotional Intelligence-Inventory 2.0 (EQ-i 2.0)?

$H2_o$: There is no relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

$H2_a$: There is a relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

RQ3. What relationship exists between a leader's self-perceived ability to adapt to merger-related stress as described in a qualitative interview compared to their flexibility score on the EQ-i 2.0?

$H3_o$: There is no relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

$H3_a$: There is a relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

RQ4. What relationship exists between the overall stress management score of leaders from the larger blood center and leaders of the smaller-sized partnering blood centers as measured by the EQ-i 2.0?

$H4_o$: There is no difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized blood centers.

$H4_a$: There is a difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized partnering blood centers.

Description of the Participants

The population of 89 leaders invited to participate in this study were part of a multi-state merger comprised of four blood centers in four states. Each center entered into

the four-way partnership at different times over the course of five years. The EQ-i 2.0 was emailed to 89 blood center leaders across all four states. A total of 82 leaders completed the assessment. After consideration of exclusionary criteria, data from a sample of 78 leaders are included in the following demographic and data analysis process, yielding an 87% response rate on the online assessment.

Table 3 shows the ages of participants to be mainly in the 40 years and older categories with ages 40-49 holding the majority of leaders (*n* = 24; 31%). In regard to gender, females (*n* = 38; 49%) and males (*n* = 40; 51%) are in equal distribution among leaders. Most leaders who responded to the survey were located in State S4 (*n* = 59; 76%), and the majority of the leaders surveyed held director-level roles (*n* = 61; 78%).

Table 3

Demographics from the EQ-i 2.0 Assessment (N = 78)

Characteristic	*n*	%
Age Range in Years		
30-39	4	5
40-49	24	31
50-59	19	24
60-69	17	22
Not reported	14	18
Gender		
Female	38	49
Male	40	51
Location		
State S1	5	6
State S2	9	12
State S3	5	6
State S4	59	76
Job level		
Director	61	78
Executive	11	14

Table 3

Demographics from the EQ-i 2.0 Assessment (N = 78)

Characteristic	*n*	%
C-suite	6	8

Note. Alphanumeric coding of state locations is to maintain confidentiality of the blood centers involved since only one or two blood centers exist in some states.

Quantitative Descriptives

The data from the EQ-i 2.0 were entered into IBM SPSS® Statistics version 26 to determine the relationship between study variables. Descriptive statistical analysis was run along with tests for normality using Shapiro-Wilk and Kolmogorov-Smirnov, histograms, scatter plots, and boxplots. The descriptive analysis displayed in Table 4 presents the minimum, maximum, and mean values for the study variables. The mean for total EQ scores (107.04) and stress management scores (105.22) are close; <2 points averaged. The mean values for stress tolerance (106) is also aligned with the mean values of total EQ and stress management scores. The variable of flexibility has a mean value of 102.85, which is lower than the mean values of the other variables by multiple points. The flexibility subscale also has the highest standard deviation among all the variables at 12.05. The other variables demonstrate the standard deviation that is in the range of 10.65 to 10.77. In scoring the EQ-i 2.0 assessment, an imbalance between subscales is indicated by scores with more than a 10 point spread between subscale scores.

All variables show that they are negatively skewed with no significance, however flexibility showing more skewness. More values to the left of the mean indicate lower EQ scores. The kurtosis value of the flexibility subscale is also high at 1.05, indicating that there is variability with more outliers in the distribution of the flexibility scores. The

kurtosis value of total EQ score and stress management score is 0.06 and 0.31 respectively, which measures the distribution of the data around the mean, with a normal distribution having a values between +2 and -2 (George & Mallery, 2013).

Table 4

Descriptive Statistics (N = 78)

	Minimum	Maximum	Mean	Std. Dev.	Skewness	Kurtosis
Total EQ Score	80	131	107.04	10.65	-0.20	0.06
Stress Management	76	128	105.22	10.73	-0.18	0.31
Flexibility	66	125	102.85	12.05	-0.81	1.05
Stress Tolerance	76	124	106.00	10.77	-0.37	-0.45

Shapiro-Wilk test and Kolmogorov-Smirnov test were conducted to determine if the distribution of data was significantly different from a Gaussian distribution. With focus on the Shapiro-Wilk shown in Table 5, the significance values (*p*-value) for stress management and total EQ score are both greater than .05. Therefore, it can be concluded that total EQ and stress management scores are normally distributed in within the sample.

Table 5

Tests for Normality

	Kolmogorov-Smirnov			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
Total EQ Score	0.07	78	0.20	0.98	78	0.59
Stress Management	0.09	78	0.07	0.98	78	0.26

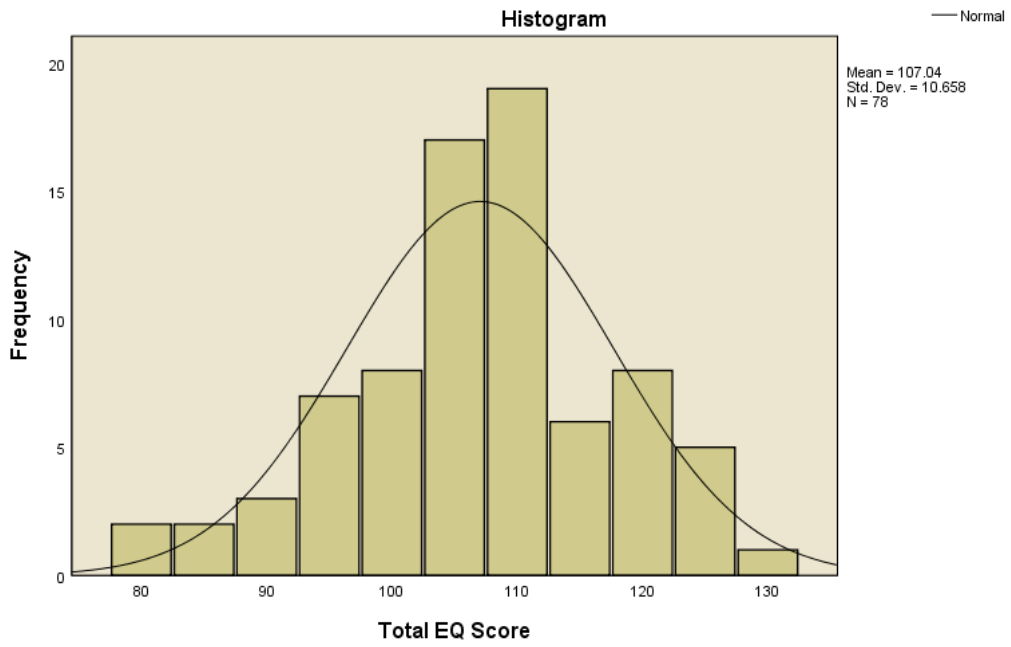

Figure 3. Histogram showing frequency of total EQ scores which forms a bell curve indicative of a normally distributed data set.

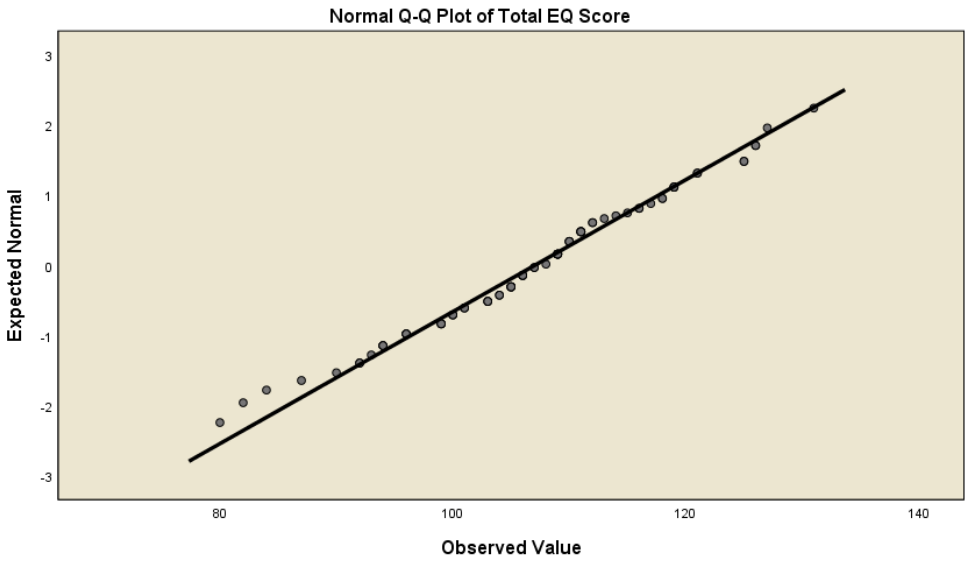

Figure 4. Q-Q plot of total EQ scores that are evenly distributed along the line with minimal deviation, indicating normal data distribution.

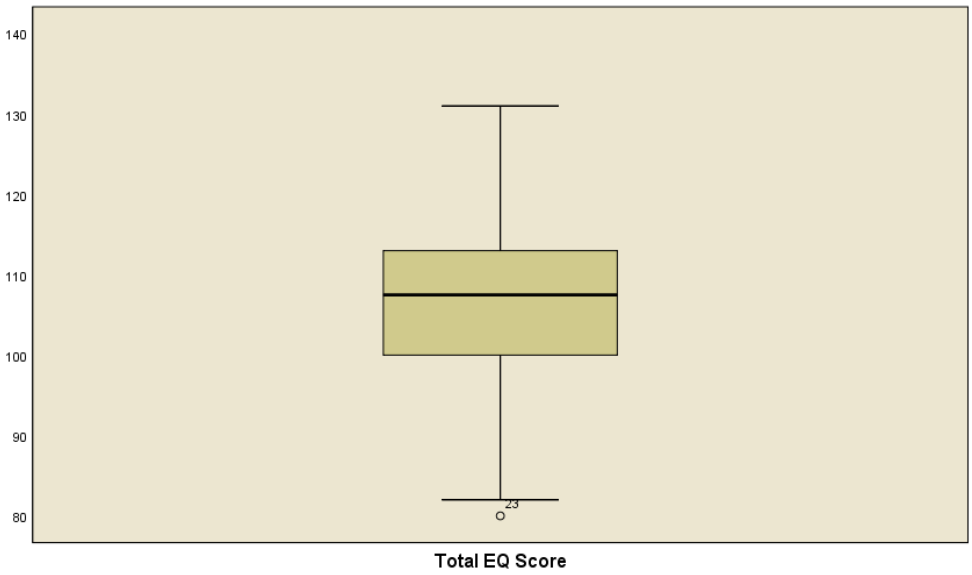

Figure 5. Box plot of total EQ scores.

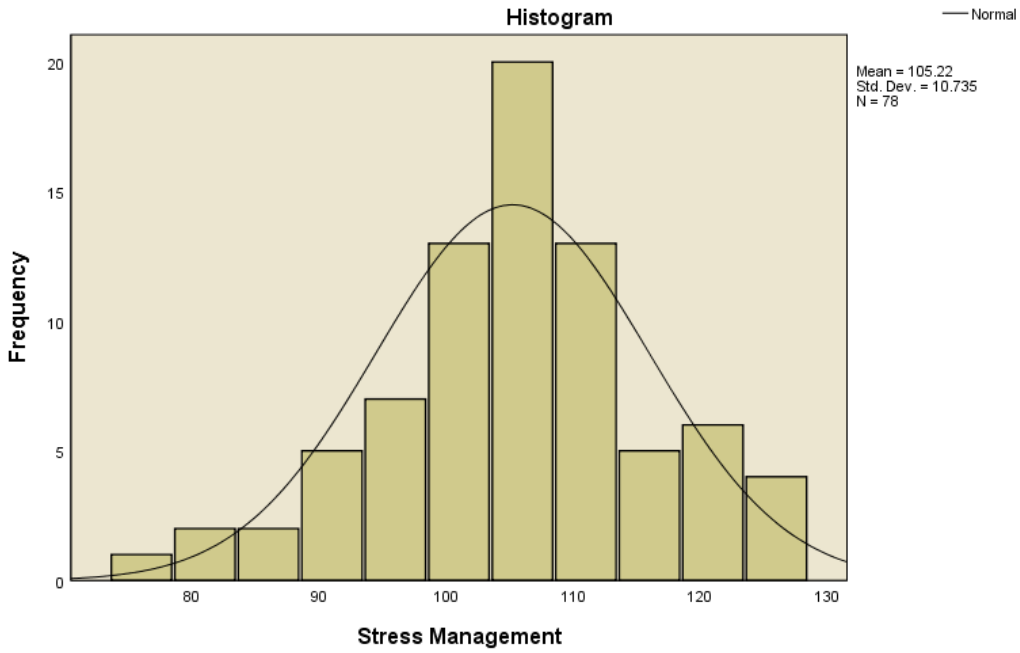

Figure 6. Histogram showing frequency of stress management scores which shows a bell curve indicative of a normally distributed data.

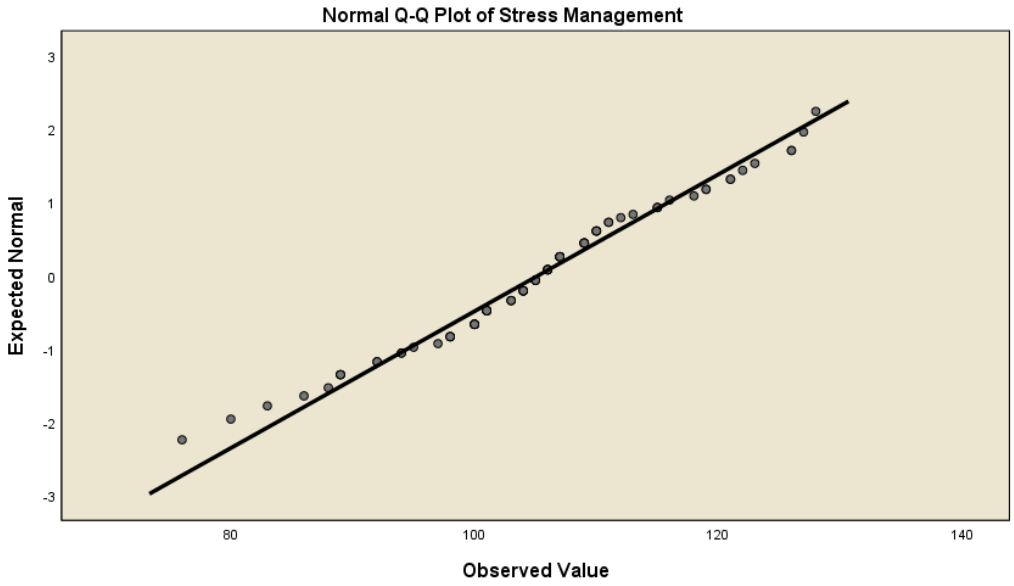

Figure 7. Q-Q plot of stress management scores that are evenly distributed along the line with minimal deviation, indicating normal data distribution.

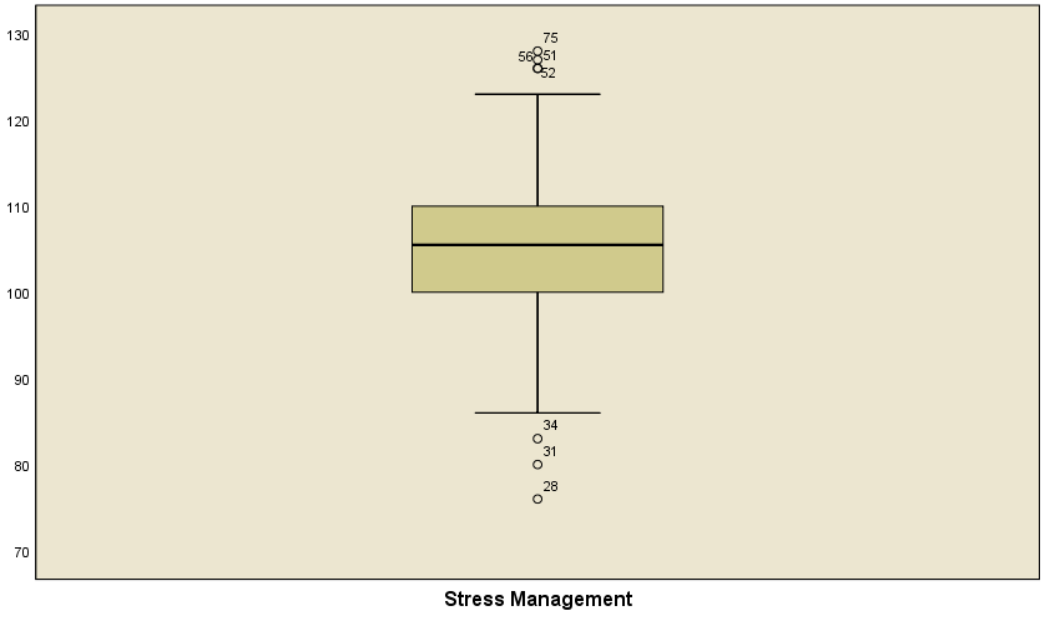

Figure 8. Box plot of stress management scores.

The quantitative descriptives in the form of histograms, Q-Q plots, and boxplots provided insight about the data showing a normal distribution of responses from the EQ-i assessment. The data revealed that overall stress management scores and stress tolerance scores had similar mean scores. However, there was variation in flexibility scores. The next section will present descriptive data from the qualitative interview portion of the study where data were examined using NVivo 12.

Qualitative Descriptives

Qualitative interviews were conducted to draw out more detailed descriptions of each leader's involvement in and sentiment toward the merger. Eleven qualitative questions (see Appendix E) were developed with intent to evoke reflection and thoughtful responses about emotions and behaviors that may have been a result of managing stress and adapting to the merger. Of the 78 leaders who completed quantitative questionnaire, 13 leaders (*n* = 13; 17%) participated in the qualitative interviews. Table 6 provides descriptives of the interview participants.

Table 6

Demographics of Qualitative Interview Participants (N = 13)

Characteristic	*n*	%
Gender		
Female	9	69
Male	4	31
Location		
State A	3	23
State B	4	31
State C	2	15
State D	4	31

Table 6 continued

Demographics of Qualitative Interview Participants (N = 13)

Characteristic	*n*	%
Job level		
Director	11	78
Executive	2	14
C-suite	-	-

The researcher recorded four face-to-face sessions using an mp3 voice recorder. Eight interviews were conducted via virtual meeting software (Zoom). Video and audio files were recorded from the Zoom sessions. The responses from one interview were recorded on a notepad. The audio files were uploaded and transcribed in NVivo Transcription. A review of the transcribed files was conducted to ensure accuracy of the transcription software. Nodes were created where word frequency and emergent themes appeared. Sentiment about the merger was coded as positive or negative. Nodes were combined if closely related or carried the same sentiment about the merger. Sentiment was assigned in SPSS (numeral 1 assigned to positive sentiment, numeral 0 assigned to negative sentiment) for each of the 13 interview participants to create the dataset for correlation testing.

Researcher Bias

The principle investigator for the study was employed by one of the participating smaller-sized blood centers prior to the merger. The investigator was present during all phases of the merger as the states aligned to become a single organization. To address the issue of potential bias on behalf of the researcher, all nodes were evaluated by a second researcher. Discussions were conducted around the interpretation of responses and the assignment of codes. Codes were reassigned or new nodes generated to maintain an

objective standpoint and to ensure the voice of the participant was represented as accurately as possible.

Emergent Themes

The qualitative interview questions were developed to promote discussion around research questions 2 and 3 that were focused on perceptions of stress tolerance and adaptability to merger-related stress. Semi-structured questions allowed for reflection and open dialogue. It was the design of the interview questions to discuss stress brought on by the merger versus stress that would be experienced in day-today work-life. It was also emphasized that responses about adaptability must be specific to merger-related change and not process change that would occur if the merger was not in affect.

Stress Tolerance Nodes. A merger can be a traumatic and life-changing event for those who remain with the new organization (Harrison-Walker, 2008, p. 1). High emotions and change events can be destabilizing (Lotz & Donald, 2006, p. 2). Participants were asked to identify emotions that were associated with initiation of the merger. The following nodes were identified and coded in NVivo 12: anxiety, competitive, excitement, fear of the unknown, frustration, uncertainty, relief, and greater sense of responsibility. Within these nodes, positive and negative emotions were expressed. Participants were then asked to determine if the emotions they experienced were stressful. Responses to stress questions were coded as positive sentiment or negative sentiment toward merger-related stress. Positive sentiment about stress was identified from six of the 13 participants and seven negative sentiment responses were coded. Of the six positive responses, 50% (3) were from the larger organization, with one positive response from each of the other three smaller organizations. Of the seven responses

coded as negative sentiment, 29% came from state S1, 43% from state S2, 14% from state S3, and 14% from state S4. Overall, negative stress perception was expressed by 84% of respondents from the smaller sized organizations. Table 7 displays nodes coded as symptoms of stress identified by respondents.

Table 7

Symptoms of Stress caused by Merge-related Activity

Nodes	Frequency
Physical symptoms	
Loss of sleep/tired	4
Racing heart/breathing pattern change	2
Sickness	2
Overeating	1
Psychological symptoms	
Need for constant clarification/confirmation from higher authority	4
Masking emotions	3
Withdrawal from interaction/avoidance	3
Lack of patience	2
Inability to reason or maintain train of thought	1

Loss of sleep was a node that was only experienced by leaders from the smaller blood centers. There were six total comments that were assigned nodes for *racing heart/breathing pattern change* and *need for constant clarification/confirmation from higher authority*. Of the six leaders who shared this symptom, five (83%) expressed positive sentiment toward the merger-stress. Three of the six who shared these symptoms were from the larger state. Four of the six (67%) scored high in all subscales of EI: overall EQ, stress management, stress tolerance, and flexibility. All six (100%) had high EQ scores in flexibility.

Adaptability Nodes. Lotz and Donald (2006) asserted that one's interpretation of stress is essential to the response to stress. Responding to stress involves behavioral and psychological adjustment (Lotz & Donald, 2006). In this study, adaptability and flexibility are used interchangeably. Flexibility is the EQ subscale that encompasses one's ability to adapt emotions and behaviors to unfamiliar circumstances (Bar-On, 1997). Participants were asked to share a merger-related change that was impactful to their merger experience. Responses were coded as positive or negative sentiment in regard to adapting to the merger-related change event. Nodes are displayed in table 8 along with the state code of the participant.

Table 8

Nodes of Sentiment about Adaptability to Impactful Merger-related Activity

Nodes	State code of respondent
Negative sentiment	
Loss of credibility	S1
Loss of local decision making	S1, S2
Focus on financial outcomes over mission/people	S1
Reporting/organizational structure – decentralized, matrix, dotted line	S1, S2, S3, S4
Loss of local process/practices	S1, S2
Positive sentiment	
Personal growth/development opportunity	S2, S4
Peer support/collaboration across states	S1, S2, S4
Standardization/alignment initiatives	S1, S2, S4

Notably, there were no positive adaptability sentiments coded from state S3. Respondents from states S1 and S2 had the most variability in their responses. States S2 and S4 had responses coded in all three of the positive sentiment nodes. At least one participant from each state described the reporting structure as a negatively impactful merger-related

change that was stressful and a difficult adjustment to make. The following comments are from leaders about the new structure:

S1-1

> You have leaders that report to leaders outside of the local organization. All of that is different and brings about its own unique concerns to manage through. There's something to be said about being able to walk down a hallway to have a conversation with a leader versus having to text, or call, leave voicemail. Everyone from the top down is working hard to make sure that the donor facing team members are getting what they need. But that level in between, middle management, there also needs to be a support for them. And you know in a bigger setting it's not always as easy to achieve.

S2-4

> Since the merger I have to I report to somebody who is not here, who's someone I never really knew. So that's been a real change. I mean I've always reported to a local person. I always just reported to my direct CEO and this was the first time where I really was reporting someone who was a brand new. That was very stressful trying to get to know someone brand new.

S3-5

> I have a new leader and I'm used to having a leader who understood the program and understood the team. Then I was given a leader from another state who is brand new to my world and I find that, to this day, still to be stressful.

S4-39

> So, the operational changes that significantly impacted me and my ability to get work done have been really all around one department being aligned across four

states. Each of the states have their own director. So instead of having one line of people that you work through you're working through four lines and those four lines are not aligned either. That has been the biggest impact and it has significantly impacted the ability for me to move operational changes through the system.

Descriptives of the qualitative data provided insight into each leader's merger experience and uncovered multiple relationships among respondents such as being associated with a certain state, being a member of a larger or smaller merger group, or having shared sentiments. Statistical testing in the next section will integrate quantitative and qualitative data to show if there is significance that explains emotional intelligence as a facilitator of a positive merger experience.

Hypothesis Testing

Research Question 1: Regression Analysis

RQ1. What relationship exists between leaders' overall EI score and their stress management scale score?

$H1_o$: There is no relationship between the overall EI score and the stress management scale score.

$H1_a$: There is a relationship between the overall EI score and the stress management scale score.

Hypothesis testing was conducted by running a linear regression. Tables 9-11 represent the results of the regression analysis. The R square value of .693 in Table 9 indicates that total EQ score accounts for approximately 70% of the variation observed in the stress management scores. The ANOVA in Table 10 shows a significance level of

.001. When the significance is less than .05 then the linear regression is significant. The prediction equation in Table 11 comes from the Unstandardized Coefficient value of .838 and a significance level (*p*-value) of <0.001. When the significance level is less than .05, then it can be predicted that the stress management score will increase by a unit of .838 when the total EQ score increases by one unit (point).

Table 9

Model Summary: R Square Determination

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
1	.832[a]	.693	.688	5.992	1.830

a. Predictors: (Constant), Total EQ Score

b. Dependent Variable: Stress Management

Table 10

ANOVA: Significance Levels

	Model	Sum of Squares	df	Mean Square	F	Sig.
1	Regression	6144.889	1	6144.889	171.166	.001[b]
	Residual	2728.406	76	35.900		
	Total	8873.295	77			

a. Dependent Variable: Stress Management

b. Predictors: (Constant), Total EQ Score

Table 11

Regression Coefficients

	Unstandardized Coefficients		Standard Coefficients		
	B	Std. Error	Beta	t	Sig.
(Constant)	15.502	6.891		2.25	0.02
Total EQ Score	.838	.064	0.832	13.08	<0.01

a. Dependent Variable: Stress Management

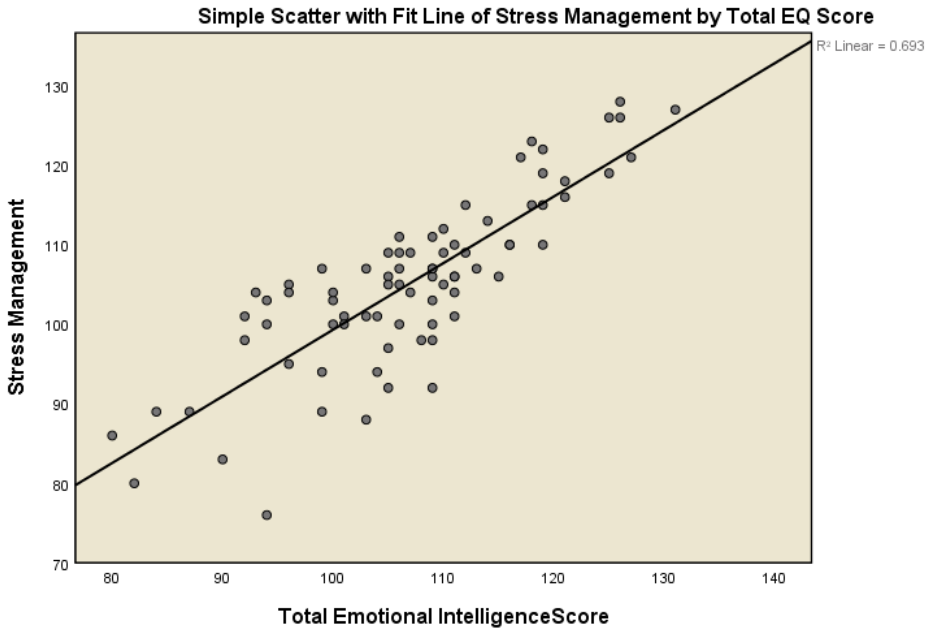

Figure 9. Scatter plot showing a directional relationship between total emotional intelligence scores and stress management scores.

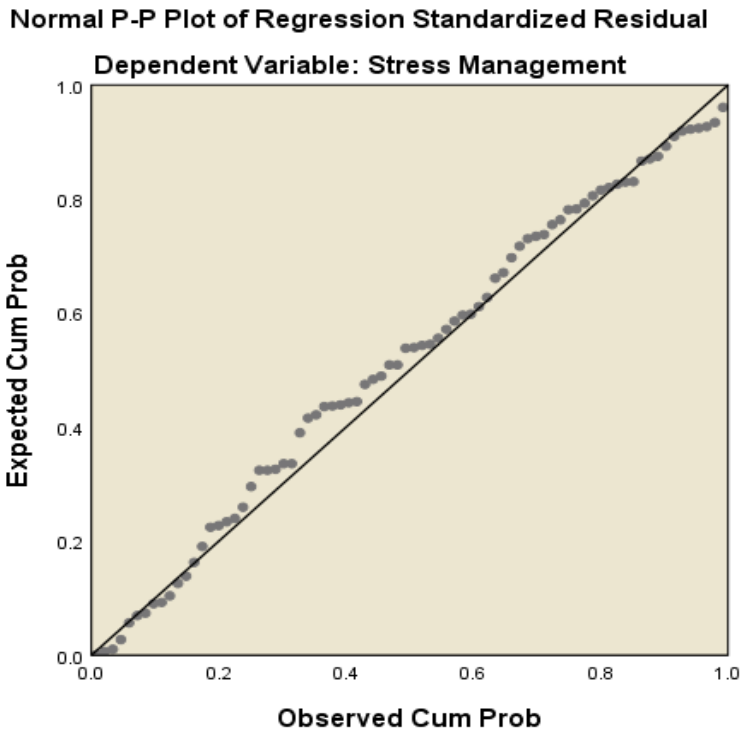

Figure 10. P-P plot showing a normal distribution of stress management and total EQ scores.

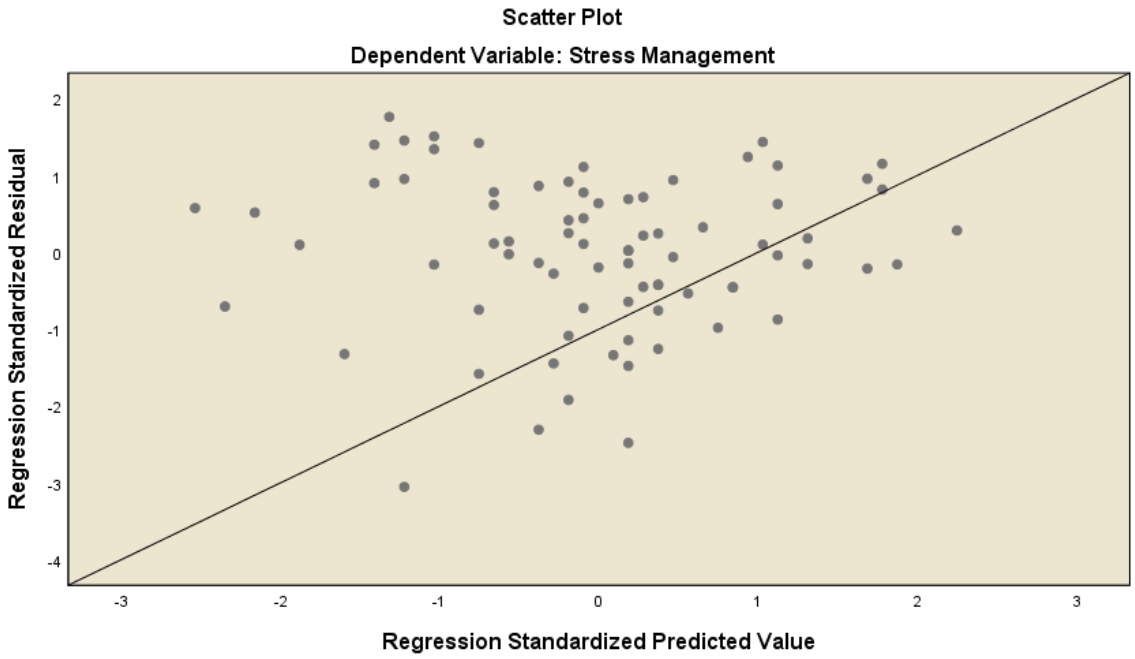

Figure 11. Scatter plot showing strength of stress management residual in relation to the regression line.

Research Question 2: Correlation Analysis

RQ2. What relationship exists between a leader's self-perceived ability to tolerate merger-related stress as described in a qualitative interview compared to the stress tolerance score measured by the Emotional Intelligence-Inventory 2.0 (EQ-i 2.0)?

$H2_o$: There is no relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

$H2_a$: There is a relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

Pearson *r* correlation testing was run to perform analysis of stress tolerance scores from the EQ-i 2.0 quantitative assessment in relation to positive and negative stress perceptions described in the qualitative interviews. Tables 12 and 13 represent the

results of the analysis. For correlation values to represent a strong relationship, the values must be close to 1.0 or -1.0 (Cronk, 2012). Correlation values less than .03 are considered weak and correlation values greater than 0.7 are considered strong (Cronk, 2012). A negative correlation value of -.282 shown in Table 13 represents an inversely proportional weak correlation.

Table 12

Pearson r Correlation Coefficient (N=13)

	Mean	Std. Deviation
Stress Tolerance	108.31	10.896
Stress Perception	.5385	.51887

Table 13

Pearson r Correlation

		Stress Tolerance	Stress Perception
Stress Tolerance	Pearson Correlation	1	-.282
	Sig. (1-tailed)		.175
	N	13	13
Stress Perception	Pearson Correlation	-.282	1
	Sig. (1-tailed)	.175	
	N	13	13

The scatter plot in Figure 12 shows no directional relationship between variables. High or low scores on the stress tolerance subscale of the EQ-i assessment were not related to positive or negative sentiments about stress tolerance.

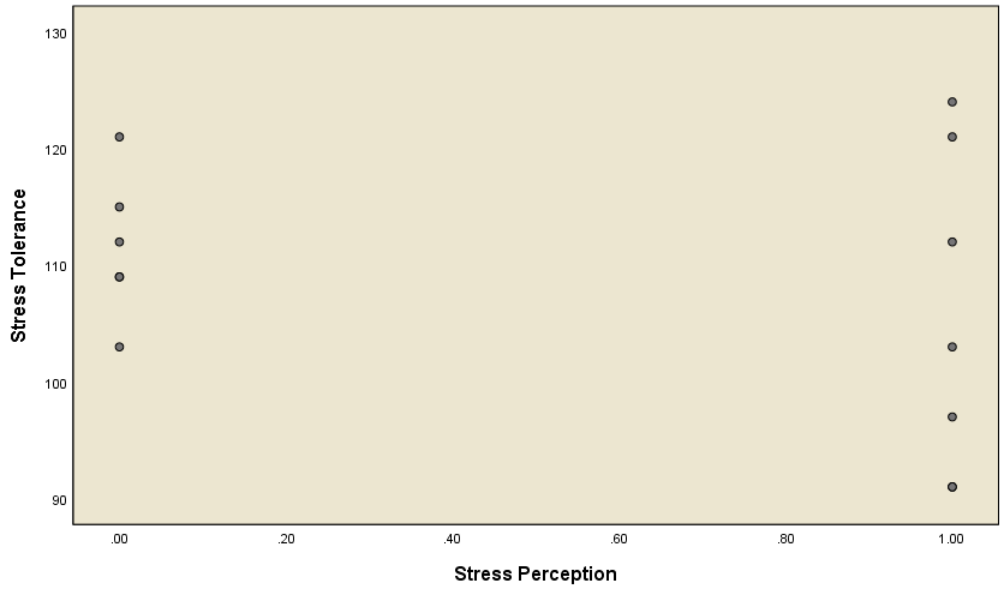

Figure 12. Scatter plot showing no directional relationship between stress tolerance scores and stress perception.

Research Question 3: Correlation Analysis

RQ3. What relationship exists between a leader's self-perceived ability to adapt to merger-related stress as described in a qualitative interview compared to their flexibility score on the EQ-i 2.0?

$H3_o$: There is no relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

$H3_a$: There is a relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

Pearson *r* correlation testing was run to perform analysis of flexibility scores from the EQ-i 2.0 quantitative assessment in relation to positive and negative perceptions of adaptability described in the qualitative interviews. A flexibility score of 107 falls with the normal range of EI performance. Tables 14-15 represent the results of the analysis. A negative correlation value of -.190 represents an inversely proportional weak correlation.

Table 14

Pearson r Correlation Coefficient (N=13)

	Mean	Std. Deviation	N
Flexibility	107.00	11.269	13
Adaptability Perception	.3846	.50637	13

Table 15

Pearson r Correlation of Flexibility Score and Perception of Adaptability

		Flexibility	Adaptability Perception
Flexibility	Pearson Correlation	1	-.190
	Sig. (1-tailed)		.267
	N	13	13
Adaptability Perception	Pearson Correlation	-.190	1
	Sig. (1-tailed)	.267	
	N	13	13

The scatter plot in Figure 13 shows no directional relationship between variables. High or low scores on the EQ-i assessment were not related to participants' positive or negative sentiments about their adaptability to merger stress.

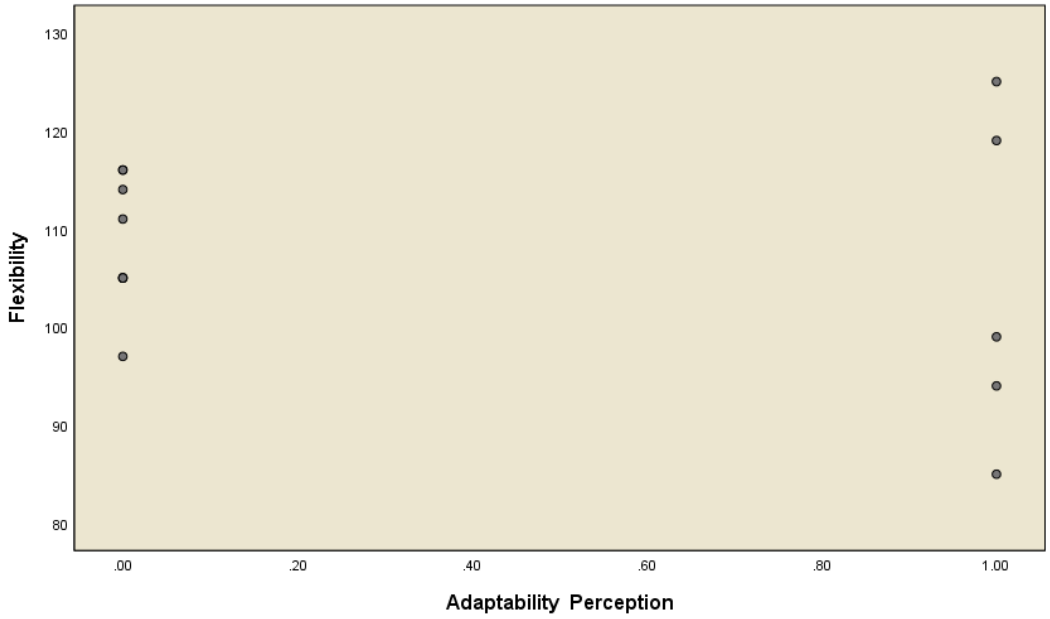

Figure 13. Scatter plot showing no directional relationship between flexibility scores and perception of adaptability.

Research Question 4: *t*-test Analysis

RQ4. What relationship exists between the overall stress management score of leaders from the larger blood center and leaders of the smaller-sized partnering blood centers as measured by the EQ-i 2.0?

$H4_o$: There is no difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized blood centers.

$H4_a$: There is a difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized partnering blood centers.

A *t*-test analysis was run to compare the stress management scores of leaders from the larger merger partner with scores from leaders of the other smaller partnering blood

centers. There were 20 (26%) leaders from the sample group who were homebased at one of the smaller affiliated blood centers. There were 58 (74%) leaders who were from the larger blood center. Table 16 calculated the mean stress management score of the smaller centers group as 107.40 and the average stress management score for the larger center was 104.47. The difference between group scores is 2.93 points. The standard deviation of 11.59 for the larger center group showed stress management scores were more dispersed from the mean than the smaller centers group with a standard deviation of 7.54.

Table 16

Descriptives for Larger and Smaller Blood Centers Groups (N = 78).

	n	Mean	Std. deviation	Std. Error
Smaller centers	20	107.40	7.54	1.68
Larger center	58	104.47	11.59	1.52

Table 17

Independent Samples t-test

		Levene's Test for Equality of Variances		*t*-test for Equality of Means	
		F	Sig.	t	df
Stress Management	Equal variances assumed	3.061	.084	1.055	76
	Equal variances not assumed			1.292	51.248

In Table 17 (above) the *significance* value of .084 is greater than a *p*-value of .05 which indicates no statistical difference between stress management scores of leaders from the larger and smaller centers.

Summary

This study examined emotional intelligence as a facilitator of stress management and adaptability under merger conditions. A mixed-methods approach used the EQ-i 2.0 assessment to measure emotional intelligence and qualitative interviews were conducted to more deeply understand the nuances of the survey responses. Based on the results of a regression analysis, the overall EQ score was positively correlated with improved stress management scores. Based on a Pearson correlation of stress tolerance and flexibility subscales, there is no statistical significance in a relationship that these subscales are a factor in a leader's self-described ability to tolerate merger stress or to adapt emotionally and behaviorally to situations that cause stress. The scores and the verbal expression have no relationship. What leaders think about themselves and say about their experiences are not directionally correlated.

The location of the leader was also examined in relation to stress management score. A *t*-Test showed that stress management scores of leaders from the larger and smaller-sized merger partners were closely aligned. Therefore, no relationship exists between these variables. The discussion in chapter 5 will provide an overview of the research hypotheses, a comparison of the study results to the literature, conclusions about the study findings, implications for practice, and suggestion for future research.

Chapter Five: Discussion

The purpose of this study was to examine leaders involved in a four-way blood center merger to determine what role emotional intelligence (EI) played in stress management and leaders' adaptability to merger-related change. Based on the literature, EI is essential to one's ability to cope with stress when there is a constant need to respond to internal and external stimuli (Nizielski et al., 2013; Bar-On et al., 2007). Another aspect of the study considered the assigned location of the leader as a member of the larger merger partner or a member of one of the smaller-sized partnering blood centers. Even in a merger partnership, members of the smaller organization can have a sense of being acquired, which creates psychological barriers to adapting to the partnership (Fischer et al., 2007). This chapter provides insight to data as a support for the study questions and hypotheses. A comparison of the study results to theory and previous research will be conducted. Conclusions will be drawn from the findings of the study, and implications for practice, limitations, and suggestions for future research will also be provided.

Summary Overview of Research

This mixed methods study was conducted based on four research questions and hypotheses. The quantitative portion of the study was an administration of the EQ-i 2.0 assessment to collect data about each leader's emotional intelligence score in overall stress management, stress tolerance, and flexibility. The assessment was emailed to 89 leaders with 78 leaders matching the criteria to participate in the study. Of the leaders who completed the survey, 13 leaders participated in a semi-structured qualitative

interview. The interviews provided the opportunity to delve deeper into personal experiences. The research questions and hypotheses will be discussed in regard to the outcomes of the data.

Research Question 1

RQ1. What relationship exists between leaders' overall EI score and their stress management scale score?

$H1_o$: There is no relationship between the overall EI score and the stress management scale score.

$H1_a$: There is a relationship between the overall EI score and the stress management scale score.

Hypothesis testing was conducted in regard to the total EI scores of merger leaders in relationship with their stress management score. The null hypothesis states that there is a relationship between the two variables. A linear regression analysis indicated that total EI contributes to approximately 70% of the variation in stress management scores. There is a statically significant relationship between overall EI score and stress management score in that when the total EI score increased by one point, the stress management score also increased by an increment of .838. Stress management scores can be predicted by total EI scores, therefore, reject the null hypothesis.

Research Question 2

RQ2. What relationship exists between a leader's self-perceived ability to tolerate merger-related stress as described in a qualitative interview

compared to the stress tolerance score measured by the Emotional Intelligence-Inventory 2.0 (EQ-i 2.0)?

$H2_o$: There is no relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

$H2_a$: There is a relationship between the EQ-i 2.0 stress tolerance score and a leader's description of his ability to cope with merger-related stress.

Pearson *r* correlation testing was run to analyze stress tolerance scores from the EQ-i assessment in relation to positive and negative stress perceptions described in the qualitative interviews. The mean stress tolerance score for the 13 leaders who participated in the qualitative interviews was 108.31 which falls within the normal range of stress tolerance scores on the EQ-i 2.0 assessment. Based on the correlation coefficient value of -.282, there is variability among the positive and negative sentiments of stress tolerance. No relationship was identified between stress management scores and expressions of positive or negative sentiment toward toleration of merger-related stress described in the personal interviews. Do not reject the null hypothesis.

Research Question 3

RQ3. What relationship exists between a leader's self-perceived ability to adapt to merger-related stress as described in a qualitative interview compared to their flexibility score on the EQ-i 2.0?

$H3_o$: There is no relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

$H3_a$: There is a relationship between the EQ-i 2.0 flexibility score and a leader's description of his ability to adapt to merger-related stress.

Pearson *r* correlation testing was run to perform analysis of flexibility scores from the EQ-i 2.0 quantitative assessment in relation to positive and negative sentiments of adapting to merger-related change. The mean score of 107 for flexibility score on the EQ-i 2.0 assessment was within the normal range. The correlation value of -.190 shown in Table 15 represents a weak relationship between variables. A negative correlation value of -.190 also represents high variability in responses. Therefore, flexibility scores on the EQ-i 2.0 have no relationship with a leader's positive or negative sentiment about adapting to merger-related change. Do not reject the null hypothesis.

Research Question 4

RQ4. What relationship exists between the overall stress management score of leaders from the larger blood center and leaders of the smaller-sized partnering blood centers as measured by the EQ-i 2.0?

$H4_o$: There is no difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized blood centers. .

$H4_a$: There is a difference in the overall stress management score between leaders from the larger blood center and leaders from the smaller-sized partnering blood centers.

A *t*-test compared stress management scores of leaders from the larger merger partner with scores from leaders of the other smaller partnering blood centers. The mean stress management score of the smaller centers group was 107.40 and the mean stress

management score for the larger center was 104.47. The difference between group scores is 2.93 points. The significance value of .084 is greater than a *p*-value of .05, therefore, there is no statistical significance that indicates a difference in stress management between leaders from the larger blood center compared to leaders from the smaller blood centers. They are similar regardless of location. Do not reject the null hypothesis.

Relationship of the Results to Prior Research and Theory

This study followed theories of emotional intelligence, mergers and acquisitions, and stress. There were mixed results from this study, some of which aligned with the literature and other results that may only be generalizable to the context of this study. The overarching theme of emotional intelligence as a facilitator stress management and adaptability will be reviewed in regard to research cited in the literature review. This study explored the sentiments of larger and smaller blood center leaders in consideration of research that proposed differences between leaders of acquired and acquiring organizations. This section will also provide insight into the issue of "us versus them" syndrome between merger partners. Theories on merger integration patterns and the effects on stress will be compared with the results of this study, along with concepts of personal and organizational valence.

Overall Emotional Intelligence and Stress Management

Individuals with a higher emotional aptitude will experience a less negative response to change, which allows them to be more adaptable to stress (Bar-On, 2006). Zeidner et al. (2009) support Bar-On with the argument that individuals with high EI also possess a higher emotion appraisal and coping skills, therefore, their experience of stress from emotionally demanding situations is also reduced. The results of this study support

this idea based on the data from Research Question 1 where regression analysis showed that as the overall EI score increases, so does the stress management score.

Studies with stress-related outcomes have confirmed that EI is positively linked with psychological and physiological health (Martins et al., 2010; Schutte et al., 2007). Qualitative responses from merger leaders align with this assertion as leaders commented they felt competitive, excited, and believed there would be growth opportunities for them. Nine of 13 leaders (69%) shared these positive sentiments and of those, 12 had total EI scores that ranged from normal to high on the EQ-i-scale. Goleman (1998b) also asserted that EI allows leaders the ability to respond to stress with hardiness and perceive work as a challenge and a development opportunity, instead of a burden.

Adaptability. Multiple researchers aligned on the premise that individuals who exhibit a higher emotional aptitude will experience a less negative response to change, which allows them to be more adaptable to stress (Bar-On, 2006; Ramos et al., 2007). The results of this study did not support the notion that high EI scores in flexibility actually facilitate adaptability to merger-related activity. Statistical analysis from Research Question 3 showed no relationship between EI scores in flexibility and one's verbal description of his adaptability to merger stress. There was too much variability in the interview question responses to make a connection between these variables.

Acquirer and Acquired Leaders

A merger can be a stressful experience for partnering organizations, especially for leaders who feel like the merger is more of a take-over than a partnership (Fischer et al., 2007, p. 205). Some leaders of the smaller-sized organization may perceive less than fair treatment (Giessner et al., 2006; Terry & O'Brien, 2001). This study explored the

sentiments of larger and smaller blood center leaders in consideration of research that proposed differences in stress management between leaders of acquired and acquiring organizations. When leaders were asked if they believed their local teams made greater sacrifices than other teams, 7 of 13 leaders (54%) made no claims that their teams made any greater sacrifices or experienced more loss or unfair treatment. Two leaders from the larger blood center felt they made a larger sacrifice because their resources were being spread across four states when they previously only supported one state. One leader from the smaller state also acknowledged more stress was experienced by the team from the larger blood center. Results from a *t*-test analysis of stress management scores between leaders of the larger and smaller blood centers showed no statistically significant difference in self-perceived stress management skills based on status or location.

Conclusions Concerning the Findings

Through the lens of merger leaders, this study examined the role of emotional intelligence in equipping leaders to more effectively navigate operational changes and stress brought on by a merger. The study variables lacked statistical significance in three of the four hypotheses, yet, many insights about the merger experience have been brought to light. Participation from 78 leaders in the EQ-i assessment demonstrated courage to have their truths told through this study in an effort to improve themselves and their organization. The qualitative interviews made it possible to gain personalized accounts of each leader's merger experience.

The relationship of total EI with the stress management scale provided confirmation that as overall EI increases, so does the stress management scale. The stress management scale is inclusive of three subscales: stress tolerance, flexibility, and

optimism. It leaves the question open as to how each subscale (stress tolerance, flexibility, and optimism) is influenced by overall EI score. Do the subscales carry the same weight and are they equally influenced by total EI scores? Optimism was not a variable in this study, yet, themes of positivity appeared in multiple nodes and could be explored for better understanding of how optimism lends to better stress management under merger conditions.

The findings in Research Questions 2 and 3 were a comparison of EI scores, taken as a self-assessment, and qualitative responses which described how leaders saw themselves in regard to stress tolerance and adaptability. The Pearson correlation analysis revealed very weak relationships with no statistical significance in both hypotheses. It seems that some leaders' *thoughts* about themselves while taking the EQ-i assessment were not aligned with what they said about themselves. When leaders were presented with thought provoking, open-ended questions and engaged in dialogue about their actual experiences, instead of hypothetical scenarios, the stories they shared in some cases were different from the stories they told themselves about themselves during the survey assessment. No further conclusions could be drawn as to the correlation of how leaders viewed themselves on the assessment versus how they described themselves in various interview responses about their merger experience.

Research Question 4 revealed no statistical significance to support the hypothesis that stress management scores of merger partners were different based on factors such as status, location, or access to benefits. Being the larger or smaller merger partner had no influence on the scores. This is enlightening since there is research that proposed that a merger can be a stressful experience for partnering organizations, especially for leaders

who feel like the merger is more of a take-over than a partnership (Fischer et al., 2007). Comments from the qualitative interviews made it clear that stress weighs heavy on both sides of the merger. Based on the average stress management scores of 107.40 and 104.47 for the smaller and larger groups, respectively, the indication is that merger leaders in this study are equipped to effectively thrive under conditions of merger stress.

Finally, there was one node that was coded as a negative sentiment based on comments from at least one leader at each of the blood centers. Multiple leaders stated that the organizational reporting structure was the most impactful operational change that caused stress in the beginning and is still a source of stress and poor adaptability years later, in some cases. The current structure has created many layers of bureaucracy and has reduced the effectiveness of some leaders to make decisions and drive change.

Implications for Practice

Based on the premise that emotional intelligence is the foundation of better merger leadership, the researcher proposed that all leaders in the merging organization take part in the study. A four-way merger is a heavy lift and leaders need all tools sharpened to individually and collectively maneuver through the challenges ahead. The leadership team of directors and executives who participated in this study stepped to the line to be the first in their organization to be assessed and to learn ways to leverage emotional intelligence as a tool for effective leadership. Only four elements of EI were involved with this study, however, to gain the full effect of emotional intelligence, the model must be presented as a complete tool. The five scales and 15 subscales cannot be presented in isolation. Understanding the model includes knowledge of how the subscales

work when used in complement to one another and knowing the implications of operating at extremes or out of balance.

Organizations that choose to leverage EI would benefit from a well-developed leadership program with EI as a core competency and ongoing development plans so leaders continue develop EI. Added value would be gained from a one-on-one EI coaching session with a certified EI coach after assessment to help leaders digest the content and determine next steps. Build EI in the culture by including EI in new employee orientation (NEO). Introducing EI to front line leaders and customer facing staff could help develop social skills, which could lead to improved customer service. Most individuals with high EI are socially effective (Van der Linden et al., 2017) and are better performers in social jobs (Joseph & Newman, 2010). With all leaders and staff practicing EI, leaders can confidently bring on a new merger partner.

Limitations

Fewer than expected leaders participated in the qualitative surveys. With only 13 participants across four states, there were instances where a node only had one reference from one leader. For that reason, some of the qualitative results may not be generalizable to all the leaders in a state and are only representative of the individual. Another limiting factor that may have impacted interview participation rate was the length of time that passed between the administration of the survey instrument and the semi-structured interviews. Leaders were not as available or interested in participating in an interview. Joseph (2014) studied mergers in relation to the timeliness of conducting research and found that after the two year premerger-to-post-merger phase, there was still a willing sample of employees who had experienced various stages of the merger who

demonstrated adequate recall of their merger experience. However, beyond the first year of integration (years two to three), the willingness of participants decreased or employees who experienced the merger had left the organization. At the time when this study was conducted, some centers were more than three years beyond the premerger-to-post-merger integration, and all centers were beyond the first year in post-merger integration. Therefore, the accuracy of recall and interest in participation could be a limiting factor in regard to the timing of the study.

This study was limited to one merged blood center group. There are many integrated blood centers. Learning more about the cultures within other blood center mergers would provide more direction for course correction for challenged mergers and offer new insights to effective merger leadership. This study was limited to only directors and above, however, some managers are accountable for process alignment and more data could have been brought forth from their experiences.

Suggestions for Research

Future research in mergers would benefit from examining organizational structures of blood center mergers to better understand EI in relation to reporting structure. Also, analysis of all 15 subscales could provide a more robust view of EI as a facilitator of effective merger leadership. Another opportunity is to explore mergers in relation to ethnic and gender diversity in senior-level roles. More could be learned about merger leaders with regard to EI and leader orientation toward personal or organizational valence. A study could reveal how an orientation toward personal or organizational valence aligns with the EQ-i social responsibility subscale score. Insights about mergers and EI could be gained by studying leaders who voluntarily left the organization to

identify relationship between their levels of stress management and adaptability. Emotional Intelligence across generational diversity is an opportunity for future research considering there were at least four age group levels identified in this study. It would be interesting to understand how EI is displayed across a multi-generation workforce while establishing new organizational norms during merger integration.

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Appendix A: EQ-i 2.0 Model

Appendix B: Emotional Intelligence Scale Factors and Associated Competencies and Skills (Bar-On, 2006)

Five Factors	Competencies and Skills Assessed
Intrapersonal	**To accurately perceive, understand and accept oneself.**
Self-Regard	To accurately perceive, understand and accept oneself.
Emotional Self-Awareness	To be aware of and understand one's emotions.
Assertiveness	To effectively and constructively express one's emotions and oneself.
Independence	To be self-reliant and free of emotional dependency on others.
Self-Actualization	To strive to achieve personal goals and actualize one's potential.
Interpersonal	**Social awareness and interpersonal relationship:**
Empathy	To be aware of and understand how others feel.
Social Responsibility	To identify with one's social group and cooperate with others.
Interpersonal	Relationship To establish mutually satisfying relationships and relate well with others.
Stress Management	**Emotional management and regulation:**
Stress Tolerance	To effectively and constructively manage emotions.
Impulse Control	To effectively and constructively control emotions.
Adaptability	**Change management:**
Reality-Testing	To objectively validate one's feelings and thinking with external reality.
Flexibility	To adapt and adjust one's feelings and thinking to new situations.
Problem-Solving	To effectively solve problems of a personal and interpersonal nature.
General Mood	**Self-motivation:**
Optimism	To be positive and look at the brighter side of life.
Happiness	To feel content with oneself, others and life in general.

Appendix C: Permission to Use the EQ-I 2 Instrument

Hello Tajuana,

MHS is pleased to offer you the Student Research Discount for the EQ-i 2.0 for your research titled "Emotional Intelligence as a Moderator of Stress Management in Merger Leaders." You will be able to purchase Scored Data Set Reports for $6.00 each. You also receive a 30% Discount on the other EQ-i 2.0 Reports. I see on your application that you would like to use the EQ-i 2.0 Leadership Reports. You will receive an e-mail from the Client Services Team about how to access the EQ-i 2.0 Scoring Portal.

When you are ready to purchase the reports for the EQ-i 2.0, please contact the Client Services Department – 1-800-456-3003 ext.5 or customerservice@mhs.com.

Thank you,

Betty

Betty Mangos - Permissions & Licensing Specialist
MULTI-HEALTH SYSTEMS INC. (MHS)
In Canada: 1-800-268-6011 ext. 388 Address: 3770 Victoria Park Ave. Toronto, Ont. M2H 3M6
In U.S.: 1-800-456-3003 ext.388
Address: P.O. Box 950 North Tonawanda, NY 14120-0950
International: 416-492-2627

Appendix D: Electronic Informed Consent

In preparation of the upcoming Emotional Intelligence (EQ) Workshop at the Leadership Summit, please complete this online assessment. This emotional intelligence survey is part of a study that will explore your perceptions of your organizational environment and how your emotions guide your demonstration of leadership behaviors.

The research includes an assessment of overall EQ scores in relationship with stress management and adaptability scores. A sample of survey participants will also take part in a personal interview session to better understand the personal nuances of their survey responses. To participate, please read the following consent document.

I authorize Tajuana L. Ryder of Versiti's Continuous Improvement team and of the Indiana Wesleyan University, Department of Leadership Studies and any designated research assistants to gather information regarding my responses to questions asked on this survey. I understand all survey answers will be held in strict confidence and may be used by the researchers for future publications or become part of a published journal article or scholarly presentation.

I certify that I am over the age of 18 and I am participating in this survey of my own freewill. I recognize that some or all of the questions contained in this survey may be of a sensitive nature and may cause discomfort. I can skip any question I do not feel comfortable answering. There is no obligation for my participation and I may withdraw at any time. There is no compensation or costs to me to participate in this study.

I understand that the answers given to this survey will be maintained by the researcher for a period of no less than three years after the close of the study. The researcher will store all paper copies of surveys and release forms in a secured filing cabinet. These forms may also be digitized and stored electronically on a password-protected hard drive.

I release any claim to the collected data, research results, publication of or commercial use of such information or products resulting from the collected information.

If I have any questions or comments about this research project, I can contact:

Tajuana L. Ryder
Versiti Indiana
317-916-5218
tryder@versiti.org

or

Dr. Joanne Barnes, Dean/Graduate School
Indiana Wesleyan University
4201 S. Washington Street
Marion, Indiana 46953-9393
800-621-8667 Ext. 1138
joanne.barnes@indwes.edu

If I have concerns about the treatment of research participants, I can contact the Institutional Review Board (IRB) at Indiana Wesleyan University, 4201 South Washington Street, Marion, IN 46953. (765) 677-2090.

The survey is designed not to collect e-mail addresses or Internet protocol (IP) addresses. To further maintain confidentiality of the survey, please do not include your name or any other information by which you can be identified in any comment boxes that may be included in the survey.

By clicking on the survey link, I acknowledge that I have read the consent form and have had the opportunity to ask question about the study.

The questions must be completed in one sitting or the system will not save your answers and you will need to start over from the beginning. Allow approximately 20 minutes of uninterrupted time to complete the survey. <survey link>.

Appendix E: Qualitative Interview Questions

1. Were you a part of the organization prior to the blood center merger? If so, how long had you been with the organization prior to the merger? If not, how long after the merger did your employment begin?
2. If you were employed prior to the merger, were you part of the larger blood center that initiated the merger or were you a member of a partnering blood center?
3. Did you have a leadership role in the merger? If so, please explain your role?
4. Once the merger took place, describe your top three emotions or feelings?
    a. Had you encountered any of these emotions/feelings prior to the merger? If so, which ones?
5. Would you describe those feelings as stressful?
    a. If so, how would you describe stress?
    b. What behaviors did you exhibit?
6. Have there been changes in the way you lead since the merger occurred? If so, what are some of the specific changes you have made?
    a. Would you classify the changes a result of the merger, stress, or both? Please explain.
7. Changes that are a direct result of a merger affect everyone differently. Were there operational changes that significantly impacted you? If so, what were your feelings about that?
8. A merger typically requires a lot of changes for the involved organizations. Do you or your team feel that a larger sacrifice was made by your blood center as compared to the other affiliated blood centers? If so, can you give examples of the types of change?
9. In preparation for this research, the studies reported that mergers can influence work performance. In your work group, have you noticed either a positive or negative influence on work performance? If so, is there any evidence that the performance is attributed to the merger? Please explain.
10. The first part of this study was the emotional intelligence assessment that you completed. You received your EQ-i 2.0 report and the general meaning of the results were explained, as well as emotional intelligence. As you have now had time to

reflect on the results, has there been anything you have done to adjust to the merger, related to emotional intelligence?

11. Before concluding the interviewing, is there any other information you wish to share about this specific merger, leading before or after the merger, stress or emotional intelligence?

Appendix F: Interview Participant Consent Form

Title of Project: Emotional Intelligence as a Moderator of Stress Management in Merger Leaders
Principal Investigator's Name(s): Tajuana L. Ryder
Research Advisor's Name(s): Dr. Joanne Barnes
Academic Division/Department: Graduate Studies in Leadership

Purpose of the Research

This study will examine leaders of blood centers to gain insight into emotional intelligence as a facilitator of better stress management and adaptability under the daily charge of merger leadership. The emotional intelligence scores will reveal if there is a relationship between the overall emotional intelligence score and subset scores measuring stress tolerance and flexibility. Through assessment, merger leaders may consider emotional intelligence as a factor in leveraging their internal personal management strengths, interpersonal relationship skills, and merger strategy implementation.

Specific Procedures to be Used

I will experience the following:

- An initial email will be received with information regarding the purpose of the study and a survey link to complete an electronic assessment.
- An electronic consent must be acknowledged prior to continuing on to complete the assessment. Participation is optional.
- After completion of the assessment, a sample of participants will receive an invitation to participate in a semi-structured personal interview.
- A second consent form will be presented to interview participates. The interview will be recorded.
- The interview will take place in person or via virtual meeting software.
- I will receive a report detailing the results of my assessment. I will be instructed how to interpret the scored assessment. I will have the opportunity to ask questions about my assessment and may request follow-up coaching sessions.

I have read this page _____ (initials here)
Continue to next page.

Duration of Participation

Time commitment on my behalf to participate in the study includes:

- Approximately 20 minutes to complete a 133 item questionnaire that will be administered online.
- I may choose take part in a semi-structured personal interview session that will take 30 minutes to one hour to complete. This meeting will be scheduled on a date and time based on my availability.
- No travel is required for me to participate in the study.

Risks to the Individual

Risk associated with this study is minimal or similar to that of everyday life. Being asked to answer personal questions, e.g. about self-concept, emotions, or health conditions, may cause discomfort. I may choose not to respond to certain questions or can withdraw from the study completely with no effect on my employment.

Benefits to the Individual or Others

A benefit of participating is this study is the gain of knowledge which may increase my self-awareness in regard to overall emotional intelligence score based on a national ranking of leaders and among their peers. Participants will also be provided score indicating their level of stress tolerance and flexibility as rated by the self-assessed emotional intelligence survey. For merger leaders, intelligence of this nature may lead to better situational navigation, resulting in desired outcomes in regard to interpersonal relationships and strategic deployment.

In terms of scholarship, this study focuses on the human element of a merger; providing a lens into merger implementation from the perspective of leaders who not only lead the initiative but also experience the emotional challenges that merger activity can bring about. Emotional intelligence will be looked at as the potential lever that creates a trajectory for positive merger leader behavior, therefore, merger success.

Compensation

N/A

Extra Costs to Participate

I understand that there are no costs to participants to take part in the study.

I have read this page _____ (initials here)
Continue to next page.

Injury or Illness

I understand that there is no anticipated injury or illness that will result during the research process. In case of an unexpected injury or illness during the study, the onsite medical director will be contacted. Based on the assessment of the medical director or designee, action will be taken to further protect me from further injury or illness and care will be escalated to the nearest emergency care facility. I have the right to refuse treatment and transport. The researcher and university are not liable for any medical expenses incurred.

Confidentiality

The privacy and confidentiality of each participant will be protected by keeping all electronic assessments stored and password protected on a secure external server with a third party administrator who has no vested interest in the results of the study. Participants are asked not to include any self-identifying information while completing the survey. If a hard copy is printed, then the document will be locked in a file cabinet until distributed to the participant. Electronic copies of all signed consent forms will be sent to the Institutional Review Board (IRB) in one electronic file at the completion of the study. All study documents (hard copy or electronic) will be retained for a minimum of three years after close of the study by the principal investigator.

If I have concerns about privacy and confidentiality related to the study, I can contact:

Dr. Joanne Barnes, Dean/Graduate School
Professor, Ph.D. Program in Organizational Leadership
Indiana Wesleyan University
4201 S. Washington Street
Marion, Indiana 46953-9393
800-621-8667 Ext. 1138
joanne.barnes@indwes.ed

Voluntary Nature of Participation

I am not required to participate in this study. If I agree to participate, I can withdraw my participation at any time without penalty.

My willingness to participate or not participate in the study and decision to withdraw from the study will have no effect on my employment.

To withdraw from the study, notify the Principal Investigator/researcher, Tajuana L. Ryder, in person, by phone 317-916-5218 or by email:

tryder@indianablood.org. My survey results and personal interview statements will be excluded from the study. There will be no further contact from the researcher once withdrawal has been acknowledged.

I have read this page _____ (initials here)
Continue to next page.

Release

I participate of my own accord in this research project and release any claim to the collected data, research results, publication in any form including thesis/dissertation, journal article, conference presentation or commercial use of such information or products resulting from the collected information.

Consent to be Audio/Video Recorded
I agree to be audio/video recorded.

***YES*_____ *NO*_____**

_____
Signature Date

Consent to Use Data for Future Research
I agree that my information may be shared with other researchers for future research studies that may be similar to this study or may be completely different. The information shared with other researchers will not include any information that can directly identify me. Researchers will not contact me for additional permission to use this information. (Note: This separate consent is not necessary if you will only store and share de-identified data.)

***YES*_____ *NO*_____**

_____
Signature Date

Consent to be Contacted for Participation in Future Research
I give the researchers permission to keep my contact information and to contact me for future research projects.

***YES*_____ *NO*_____**

_____
Signature Date

I have read this page _____ (initials here)
Continue to next page.

Contact Information

If I have any questions about this research project, I can contact:

Tajuana L. Ryder
Primary Investigator
317-916-5218
tryder@versiti.org or tajuana.ryder@myemail.indwes.edu

Dr. Joanne Barnes, Dean/Graduate School
Professor, Ph.D. Program in Organizational Leadership
Indiana Wesleyan University
4201 S. Washington Street
Marion, Indiana 46953-9393
800-621-8667 Ext. 1138
joanne.barnes@indwes.edu

If I have concerns about the treatment of research participants, I can contact the Institutional Review Board (IRB) at Indiana Wesleyan University, 4201 South Washington Street, Marion, IN 46953. (765) 677-2090.

I HAVE HAD THE OPPORTUNITY TO READ THIS CONSENT DOCUMENT, ASK QUESTIONS ABOUT THE RESEARCH PROJECT AND AM PREPARED TO PARTICIPATE IN THIS PROJECT.

Participant's Signature:_____

Participant's Name (Type or Print):_____

Date:_____

Investigator's Signature:_____

Date:_____

Vita

Tajuana L. Washington-Ryder attended North Central High School in Indianapolis, Indiana. In 2003, she completed a General Studies degree in with a focus in chemistry and biology while attending Indiana University Purdue University at Indianapolis. In 2006 she was employed at the Indiana Blood Center in the Blood Collection department, where, over the course of 13 years, she held positions as phlebotomist, donor center supervisor, and operations manager. During that time, she also completed her Master of Science in Management from Indiana Wesleyan University in 2008 and a Graduate Certification in Health Care Management in 2011. She entered the Doctor of Organizational Leadership program at Indiana Wesleyan University in 2012. In 2016, she served on the Culture Crew Advisory Committee for the merger of four independent blood centers. In 2017 she became the Continuous Advisor for Versiti Blood Center and was appointed Co-president of the Multi-cultural Leadership Council.