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# Understanding emotions in higher education change management

Higher  
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## Abstract

**Purpose** – The authors explore employees' emotions during a structural change (merging departments) in the higher education sector. The purposes of this paper are to identify how employees' perceptions shape their emotional responses toward organizational change; and the variation of collective employee emotions pre-merger and post-merger.

**Design/methodology/approach** – This interpretative study uses phenomenography to better understand the phenomena of change.

**Findings** – Employees perceived their experiences as being promising (an opportunity to look forward to), threatening (a threat to be carefully managed) or inevitable (unavoidable). Emotional responses are collective, with male/older/more senior respondents experiencing different emotions as compared to others.

**Research limitations/implications** – This study is exploratory and is limited by small sample size, location and temporal specificity.

**Practical implications** – Managers should recognize that employees' experiences of change are perceived quite differently and therefore should not simply be lumped together as one homogenous group. This knowledge can be used to facilitate the change process by better managing employees' emotions to achieve positive outcomes.

**Originality/value** – Investigating emotions through an interpretive lens highlights new areas for improvement in the change management process. The authors are able to better understand why people are feeling positively or negatively toward organizational change and how and why their emotions shift over time.

**Keywords** Higher education, Organizational change, Emotions, Phenomenography, Qualitative, Interpretive

**Paper type** Research paper

## Introduction

Australian universities have undergone significant changes in the past 20 years. Despite being highly ranked worldwide, this sector is lagging behind other OECD countries in terms of public investment (Universities Australia, 2013). Responding to further potential funding cuts in public sector spending, many universities have undertaken internal re-organizations, including merging departments together to improve competitiveness. We explore a relatively under-researched topic, emotional responses to organizational change (merging departments).

The authors would like to thank those individuals who assisted with early stages of the research, and the professor who introduced us to the wonderful world of phenomenography many years ago.



Traditionally, emotional aspects of change implementation had been ignored, especially within university settings (Becker *et al.*, 2004). However, more recent attention has turned to emotions during organizational change. Change arouses intense emotions which can impact their implementation (Daus *et al.*, 2012). Change can be successfully managed by influencing employee emotions, through creating enthusiasm for the proposed changes (Becker *et al.*, 2004; Piderit, 2000). In addition to identifying how employees' perceptions shape emotional responses toward organizational change, we also seek to explore the variation of emotions pre-change and post-change.

Since the "affective revolution," scholars began to examine negative emotions, rather than stress, to learn about reducing resistance to change (Oreg *et al.*, 2011). For example, anxiety (Paterson and Cary, 2002); fear (Empson, 2001); denial, anger, depression (Zell, 2003); and Kiefer's (2005) work on negative emotions. We applaud research on discrete negative emotions; however, we are concerned that this work unveils only half the story. There has been limited progress with positive emotions. Although they have been associated with perceived success (Bartunek *et al.*, 2006), to gain a more holistic understanding it is necessary to study both negative and positive emotions (Liu and Perrewe, 2005). Recently, Seo *et al.* (2012) showed that positive and negative emotions are associated with commitment, resistance and support for change.

Only two studies have discussed discrete positive and negative emotional responses to change. Kiefer (2002) examined emotions during a merger via interviewing nine human resources employees. While this study initiated progress toward learning about discrete emotions, the contribution was limited due to the interviewees who were highly involved in the merger process and were not subject to the changes themselves. The second study (Jones *et al.*, 2008) was not focussed on emotions *per se*, but identified a range of positive and negative feelings (e.g. excitement, fear). These emotions however were mixed with "attitudinal issues and outcomes" (p. 303).

We agree that studying negative emotions is important, as these impact resistance. Yet, we argue that it is simplistic to view emotions as "a little negative to highly negative." Thus, we sought to explore the holistic emotional experience of change utilizing methods that allow for more complex emotions to emerge and to examine the dynamic aspects of the emotions over time. Previous methods used have not allowed this data to be found. Surveys impose specific categories on respondents, often only negative emotions (Oreg *et al.*, 2011) and qualitative studies have largely collected data only at one point in time. Furthermore, prior work in this field has always conceptualized emotion and change as separate entities. Our main contribution is to use an interpretive approach, which treats change and emotions as inseparable. This approach provides a novel basis from which to examine change.

### **An interpretive lens**

Interpretative approaches are founded upon a phenomenological base, stipulating the person and their world are inextricably related through lived experiences (Berger and Luckmann, 1966). The human world is never a world of itself; it is an experienced world that is always related to a conscious subject (Sandberg, 2000). A life-world ontology and social construction epistemology guides interpretative researchers. This approach directs our quest to better understand employee emotions during organizational change. Furthermore, within the interpretative tradition, human activities are based on our understanding of reality and it is our understanding that influences actions, judgments and emotions (Lamb *et al.*, 2011; Sandberg and Targama, 2007).

*Phenomenography as an alternative approach to emotions in organization change*

Phenomenography is a distinct field of inquiry that aims at “description, analysis and understanding of experiences” (Marton, 1981, p. 177). The focus is on the “meaning structure of lived experience; that is, the meaning an aspect of reality takes on for people” (Sandberg, 2000, p. 12). Understanding the cognitive basis for responding to change requires interpretation and interpretive phenomena (Isabella, 1990). Specifically, phenomenography attempts to describe and identify qualitatively different ways a group of people understand a particular phenomenon and how that understanding forms the basis of their practices (Barnard *et al.*, 1999; Marton, 1986), in this case, organizational change (see also Dackert *et al.*, 2003). So what is an “understanding”?

“Understanding” in this context is not about comprehension; rather, it is what something means to an individual. It is “people’s ways of experiencing or making sense of their world” (Sandberg, 2000, p. 12). Understandings are socially constructed and reconstructed through the person’s ongoing experiences and relationships with their world (Sandberg and Targama, 2007). Unlike other interpretive methodologies, phenomenography is specifically designed to capture variation of meaning between understandings (Marton 1981, 1986).

**Method***Context and participants*

Phenomenographic sampling focusses on purposely selecting small samples of information-rich cases for in-depth study, from which one can learn a great deal about issues of central importance (Patton, 1990). Restructuring has been rapidly expanding as a means of increasing effectiveness and this has encompassed non-profit organizations, such as educational institutions (Harman, 2002). Therefore, for our research setting we chose two university departments undergoing a merger. Employees had only been aware of the merger for a short time. They were in the “Anticipation Stage” of change (Isabella, 1990), characterized by speculation and anticipation, uncertainty and attempting to develop some understanding based on limited information.

Another reason for selection of these departments was because this sample was readily accessible to the researchers through personal connections. The researchers were not paid employees and would not be personally affected by the merger. This separation from involvement in the merger enabled the researchers to focus wholly on participant perceptions. Non-involvement of the researchers also allowed for open communication with participants. The researchers had trusting relationships with these employees, which facilitated the sharing of experiences and emotions. Participation was voluntary and confidentiality was assured.

We selected individuals for insights they would bring (theoretical sampling) and we also wanted to achieve maximum variation (Patton, 1990). We hoped for variation in affiliation, gender, position and hierarchy (Flick, 1998). Extreme positions were evident from publicly available secondary data gathered by the university. Capturing different positions would contribute to our understanding of the phenomena through individuals expressing their intensity of feeling, their meaning of the merger and different views (Patton, 1990). Sample size was guided by theoretical saturation and information redundancy (Lincoln and Guba, 1985), i.e. where little new data, concepts and/or themes emerge. Previous studies suggest that this occurs between 15 and 25 interviews (Kvale and Brinkmann, 2009). In our study, this became evident at interview 12.

To ensure the promised anonymity of participants, only a superficial description of the sample is provided. Our sample represented around 30 percent of employees to

be merged. Half our sample were administrative, half were faculty; half were female and ages ranged from 25 to 60 years. In terms of our understandings that emerged from the data, Understanding 1 comprises of three participants (all senior males), five participants in Understanding 2 and four in Understanding 3.

#### *Data collection and documentation*

In-depth interviews were conducted together by two of the authors. Phenomenographic interviews are designed to go beyond immediate superficial responses (Sandberg, 2000). They are similar to other interpretive interviews, in that they elicit individual respondent's meaning; however, they differ, in that they are specifically designed to capture variation in how respondents understand aspects of their realities. The interviews were unstructured; they were dialogue-based, which allowed for the probing and elaboration of descriptions. The principal questions were: "What does the merger mean to you?" and "How do you feel about it?" These questions addressed core issues, however, several other probing questions, such as "What do you mean by that?"; "Can you provide examples?" were used as dialectic tools to provide deeper meaning. Each interview lasted one to 1.5 hours; each was recorded and transcribed verbatim.

To gain understanding of the merger experience it is preferable to collect data on more than one occasion during the process. Thus, six months after the merger had been implemented the same interviewers initiated another round of data collection. We aimed to re-interview every one of the original participants; however, this could not be achieved due to staff turnover following the merger. Therefore, follow-up interviews were conducted with one representative person from each of the initial understandings. We used the same procedures for interviewing participants and documenting the data, as previously described.

#### *Phenomenographic analysis*

Interpreting and analyzing transcripts was "reflexive" (Alvesson, 2003) and guided by procedures offered by Sandberg (2000, 2005). Phenomenographic analysis of textual-based statements differs markedly from other qualitative methods of analysis. Content analysis (counting words), does not necessarily tell us much about the underlying meaning of words (Fiol, 1990, p. 378). Semiotic analysis identifies the structural meaning of text, but not the relationship between individual descriptions (Grbich, 2007). Phenomenographic analysis is an on-going interpretative and iterative practice, which alternates between what constitutes the merger (attributes of the merger) and how employees understand the merger (variation in understandings). Our analysis incorporated individual and group interpretation by all the researchers in the team. Throughout this process we attempted to see the merger through the employees' eyes and put ourselves into their world (Sandberg, 2005).

First, we attempted to gain an understanding of how employees conceived the proposed merger by reading the transcripts several times. After this initial familiarization, employees were sorted into tentative categories according to our general interpretation of their understanding. All transcripts were then re-read, to systematically identify what constituted the merger for these employees. Thereafter, we resumed our analysis to reveal how employees conceived the proposed merger. Throughout this iterative process, transcripts were reviewed focussing not on statements themselves, as in content analysis, but on the meaning of statements in relation to their context and the transcript as a whole in conjunction with corresponding emotions expressed by participants. We gave importance to not only the identification of the meaning unit, but also to what was said,

emotions expressed and the manner which it was said. As a result the attributes, the specific meaning and emotions toward the proposed merger were identified, i.e. the what and the how.

We defined the overall understanding for each employee, supported by his/her reported particular attributes. Attributes are various topics the participants spoke about; for example, mix of departmental cultures, contractual agreements, new power and prestige of the department and so on. Attributes reflect that part of the environment the participants use to determine how they feel about the environment. Buskirk and McGrath (1992) explain that an individuals' appraisal of change will only take into account their real experience of it, which consists of information they may have only "partially grasped" from the environment. Thus, participants reported different attributes, as they only reported those aspects they have considered and not all possible aspects. Each statement was of equal value, regardless of the number of participants sharing it. After our examination of these variations between individuals and grouping them into understandings, we then compared them within and between groups, analyzing attributes supporting each understanding.

Subsequently, we held a group discussion to arrive at a uniform set of categories. During the discussion, tentative categories formed by individual researchers were compared and any differences in terms of individual categorical allocations were reviewed through a re-analysis of relevant texts until achieving mutual agreement. This cross-checking was performed until we reached a point where we considered each understanding as stable. Group analysis resulted in three categories of employees expressing qualitatively different understandings about the merger. These understandings reflect different meanings the merger has for each participant in terms of the what and how of the merger, as well as their entwined emotional experience.

## Findings

In line with interpretive perspectives, we used four criteria to guide our process: communicative, pragmatic and transgressive validity and reliability as interpretive awareness (Sandberg, 2005). These criteria were adopted to justify our knowledge claims and their representation(s), which follow. In this study, each of the understandings is characterized by a focus on either the merger outcomes, or the process leading up to the implementation of the merger.

### *Understanding 1: change is an opportunity to look forward to*

The meaning of the merger for these participants was one of an exciting opportunity to look forward to. The meaning of this understanding is connected to enlargement, enhancement of joint resources, power and prestige of one large integrated department. Participants focussed mostly on the merger result itself. They felt hopeful, enthusiastic and secure about the merger. Essentially, the feeling was that there was nothing for them to fear once the merger was in place, as the merger was viewed to promise stability and strength. Participants in this understanding had strong positive feelings toward the merger and the end result. They also felt anticipation, hope, excitement and joy leading up to the merger. For example: "It is going to be very exciting, I'm looking forward to the bonfire [...]" Other participants said "there's all the positive things about it [...] it's all fine [...]" "[...] let's get on with it [...]" "I just love change!"

Any concerns people in this understanding may have had initially, were overtaken by the benefits of the merger and their interpretation of the merger as adding to the growth

and prestige of the department. Thus, data implies that participants in this understanding were mostly positive, due to their focus on the merger outcomes, rather than the process leading up to it. The way these individuals perceived the merger was entwined with positive feelings and they were collectively enthusiastic about opportunities associated with the merger.

*Understanding 2: change is potentially a threat that needs to be carefully managed*

The meaning of the merger for these participants was that organizational change is potentially a threat that needs to be carefully managed. The focus of this understanding was one of rationalization and structural change of resources, programs and people and of revised work and working relationships. In contrast to participants in Understanding 1, participants in Understanding 2 focussed on the process leading up to the merger and its actual implementation. These participants saw the merger as an imposed, threatening change. Overriding emotions expressed by these participants were negative emotions of fear and anger in relation to the implementation process.

The participants in this understanding were nervous about their positions and what it would mean for them personally. People emphasized the following issues; “[...] junior staff on short term contracts [...] easily threatened [...] afraid to speak out because they are worried about what might happen to their existing job [...]” “are we going to be swamped by this tsunami?,” “[...] vulnerable [...] a feeling heightened by rumor and gossip [...]” Fear is tied in with the uncertainty surrounding the merger, “it’s unpredictable [...] after that point it is all cloudy [...]”

In relation to the process, participants were viewed to show distress, expressing their surprise or shock regarding the lack of consultation leading up to the merger. Participants mentioned that the consultation process was not conducted in an organized manner, with the process being dictated from one side of the parties. One participant said, “we don’t interact too much.” They expressed feelings of disgust and anger, in relation to the possibility of a breach of the contract. There was resentment in relation to the perceived injustices, inappropriate consultation and insufficient disclosure. The following statements represent these feelings: “Lots of questions without answers [...]” “I think the way it has been done is absolutely atrocious [...]” “the process was incredibly badly managed [...] unethical and unprofessional [...]” “your admin friends in tears [...] you get a little enraged [...]”

It is interesting to note that these participants could also identify some of the potential benefits of the merger outcome. Participants held some anticipation for the new integrated department with greater prestige. However, the main issue for these participants was the process leading up to the merger and associated negative emotions. This understanding implies that negative emotions are expressed by those who focussed on the short-term process, in contrast to those in Understanding 1 who focussed only on long-term benefits.

*Understanding 3: change is inevitable*

Participants in this understanding viewed change as inevitable; they focussed on the minor degree of change and that despite the merger, the organizational identity will not change. In contrast to others, these participants were calm. Essentially, they felt that change is unavoidable and strong emotional responses by other employees were unjustified. Participants did not see “the merger” as a real merger at all and that there would be no major change to daily life. Most were relaxed, by expressing the following views: “change is as good as a holiday.”, “Everyone needs change,” “it’s all good, [...] changes happen, you’ve got to accept it.”, “[...] will remain unchanged by this process [...]”



From this perception of stability, they had a sense of trust in the merger. They could see that “there were grounds to create a new department [...] there are some good reasons for it to happen [...]” They trust that “no bad things will arise from it.” One indicated that “hidden issues [...] they are not going to occur or are not important.” This participant also implied that staff had reacted too emotionally, “the overwhelming response [...] has been an emotional one, not a cognitive one.”

One participant did not express any fear at all, nor any other strong emotional response to the merger or the implementation process. “I’m almost completely neutral [...] I have no strong feelings one way or the other [...]” This participant indicated that he felt it was not the norm to be unemotional about the merger and that his “inattention” and “detachment” could be seen as “bizarre!” However, other participants in this understanding also reported similar emotional detachment. All participants in this Understanding were calm/relaxed. All had indicated they had been involved with some sort of organizational change before and that they felt it was something they could not avoid regardless of their feelings. For this reason, these participants were more emotionally detached than those in other Understandings.

### *Understandings post-merger*

Following the merger, all but one of the original study participants in Understanding 2 had left the organization and most of those in Understanding 3 had left also. Only Understanding 1 had all of the original participants still employed. The majority of those who had left were demographically similar to those in Understanding 2. Informal telephone interviews with employees who had left and conversations with survivors, later revealed that most people left due to their fear over their uncertain future, as well as their anger over how the change was implemented (suggesting these individuals fit into Understanding 2). Next, we outline the emotional experience of the merger as described by the remaining participants. Since there are only three follow-up interviews, findings discussed in the following sections must be interpreted with caution.

### *Understanding 1: change is an opportunity to look forward to*

Findings suggest that for this Understanding, their view had not changed, “I’ve been a fan all along.” Still, the main focus here was on the improvements, the enhanced reputation and larger size. In terms of emotions expressed in relation to the understanding, they were again mostly positive. However, given that the improvements had now been realized, emotions had moved from anticipatory hope, optimism and excitement, toward emotions of happiness and pride, “I feel an immense sense of personal pride.” There was a sense of confidence and achievement.

There was also a sense of sadness, however. This sadness was in relation to the loss of staff members and deterioration in communication between remaining staff. Although this sadness was acknowledged; the overwhelming feelings in relation to the merger were still positive.

### *Understanding 2: change is potentially a threat that needs to be carefully managed*

The remaining representative for Understanding 2 indicated that there was still a very negative attitude toward the merger and how it had been implemented. Our interviewee reported that: “morale-wise, it was a disaster.” There was anger and disappointment with communication within the new merged school and increased bureaucracy. There was also frustration due to feelings of inadequacy and alienation that had

come from employee turnover. Similar to Understanding 1, there was a sense of sadness following the merger implementation due to the loss of colleagues and the “old school.”

### *Understanding 3: change is inevitable*

Findings suggest that for this group, there was still a belief that change is inevitable and that people with this view of change have “just got on with it.” There was a change here, however, in that there was now hindsight: “I had thought it was a good idea [...]. I was surprised [...]. it was actually a takeover [...]. I had a totally different idea of what it would be like.” Like Understanding 2, Understanding 3 also included elements of disappointment, “the culture has, unfortunately, changed,” “there is no listening to people.” In line with Understandings 1 and 2, Understanding 3 also expressed sadness for loss of colleagues and lost communication.

## **Discussion**

We found that people in the anticipation stage of organizational change can be categorized into three qualitatively different understandings, determined by their perception of the upcoming change and their emotions attached to these perceptions. Three understandings categorize the merger as being either promising (an opportunity to look forward to), threatening (a threat that needs to be carefully managed), or inevitable (it cannot be avoided). These findings support views of Buskirk and McGrath (1992), who suggest three similar perceptual categorizations of organizational change.

Of particular interest is the demographic composition of each of the three understandings that emerged in this study. Understanding 1 comprised solely of males, who were older employees, full professors with tenure. They were totally secure in their positions and had been privy to complete information leading up to the merger. This explains their positive emotional tone; why they were not concerned with the process leading up to the merger, but instead focussed on the positive outcomes. Employees in Understanding 2, in contrast, were younger and mostly untenured and had not been involved with decision-making leading up to the merger. Their lack of information and concern over the process of change were associated with their anxiety. Understanding 3 employees were also young untenured employees. They differ from Understanding 2, as they had worked at the organization for less time than those in other Understandings and they seemed to identify less with the organization.

After implementation of the organizational change, individuals within each understanding experienced a cognitive re-definition of the change, as suggested by Isabella (1990). We found this re-definition was associated with a shift in emotional responses to change. Specifically, similar to Buono and Bowditch (1989), we found that soon after the merger, employees became increasingly nostalgic. This was associated with increased sadness. This finding may be informed by the work of Zell (2003), who has referred to organizational change as being a process of death, dying and rebirth. Following change, it is natural for employees to feel a sense of loss and to grieve for the “lost organization.” Hence, employees move through a variety of feelings over time, from anger, to depression and finally acceptance (Zell, 2003). Our findings show some support for these propositions.

Our findings differ from Fugate *et al.* (2002), who found no significant changes in negative emotions over merger stages. We argue that their results are a consequence of their use of identical five-point Likert scales measuring emotions at each time. In contrast to Fugate *et al.* (2002), our interviews revealed that there is a qualitative

difference in how people feel over time. Emotions became less intense over time, moving from anticipatory emotions of hope and fear, to realized emotions of happiness and sorrow. Previous research on organizational change was unable to reveal these complexities involved with emotional responses over time.

In qualitative studies, transferability refers to showing that the findings have applicability in other contexts (Lincoln and Guba, 1985). We have discussed our findings and linked them to previous studies of organizational change in an attempt to demonstrate the transferability of our understandings. Although transferability is the relevant criteria for our study, other scholars may question our generalizability. Due to the location and temporal specificity, our reported findings may not be generalizable to other contexts. As Sandberg (2000) indicates, generalizing to other settings is problematic as interpretive studies are context dependent. Even if similar understandings could be discovered in other settings, participants may express different sets of emotions.

### Theoretical and practical implications

This study complements the literature by providing a knowledge base of variations in reasoning and emotions among employees experiencing organizational change. Employees are often seen as a homogenous group by practitioners and scholars alike; however, our findings show that different sub-groups exist. Phenomenography allowed us to reveal this, through identification of individuals' understandings about their experience of a merger, particularly during the pre-merger stage. We note that this stage is characterized differently by different groups of people in terms of emotions. For example, those who focus on the uncertainty of the process, experience negative emotions such as fear and anger; alternatively, those who focus on the future opportunities offered by the change, experience positive emotions, such as excitement and happiness. Our findings support Isabella's (1990) claim that collective construed reality includes both elements of fact and emotions.

Development of Understandings specifically advances theoretical understanding of organizational change. We uncovered that some individuals may not be emotionally responsive to change, while others will be. Discrete emotions have specific meanings (Roseman *et al.*, 1990); for example, joy reflects gaining a valuable object, fear reflects feeling danger and wanting safety, anger reflects something being taken away and sadness reflects the loss of something valuable. Rather than reporting that employees feel positively or negatively, identifying discrete emotions allows for an understanding of "why" people are feeling positively or negatively toward change. For management implementing change, assisting employees who are angry will involve different actions to assisting those who are fearful, for example.

Managers should recognize that employees' experiences of change are perceived differently and therefore should not be lumped together as one homogenous group. Experiences can be categorized and such "Understandings" can allow managers to better comprehend employees' feelings and specifically manage them to achieve more positive outcomes (Dasborough, 2006). Leaders need to be aware of the emotional contagion process in organizations, where emotions spread between people consciously or unconsciously (Dasborough *et al.*, 2009). Our study lends support to calls for leader emotional intelligence (Antonakis *et al.*, 2009). Further, to facilitate merger implementation, it may be necessary to set up working groups where membership cuts across existing boundaries to allow for reconstruction of meanings to take place (Dackert *et al.*, 2003).

### Methodological contribution and conclusion

Our most unique contribution lies in the use of an under-utilized methodology. To our knowledge, this is the first phenomenographic study of employee emotional responses to organizational change. In this paper, we explained the process of undertaking a study using this approach to prompt further studies using this methodology. To fully understand the benefits of phenomenography, we re-iterate how it differs from other methods. First, in phenomenographic research the analytic work is made without a certain theory in mind. Instead of defining the phenomenon as the researcher sees it (like in discourse analysis and grounded theory), here, it is the experience of the phenomenon as described by others that forms the basis of the researchers' description. Second, phenomenography is about meanings of lived experiences. Unlike most research on change which views change and emotions as separate entities (using surveys to uncover correlations or coding qualitative data to obtain frequencies), phenomenography views them as inseparable, capturing qualitatively different ways people live the experience.

In conclusion, we demonstrated that employees experience organizational change in qualitatively differently ways, depending on their understandings. The phenomenographic approach allowed us to uncover detail about these understandings and to identify the discrete emotions within each understanding. Employees experience a range of emotions in response to change; some feel calm, some feel excitement, while others feel anxious. Our study also reveals that employees' emotions became less intense over time and they change from anticipatory emotions of hope and fear in the pre-merger stage, to realized emotions of happiness and sorrow post-merger. The unique contribution of our phenomenographic approach is that it has allowed valuable new insights to be gained about the dynamic emotional experience of organizational change.

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