

INVESTING IN STRATEGIC VOLUNTEER ENGAGEMENT

A Qualitative Study

COMMISSIONED BY

The Leighty Foundation · The Lodestar Foundation · VolunteerMatch · The National Alliance for Volunteer Engagement · UJA Federation of New York

CONDUCTED BY

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INTRODUCTION

Volunteerism is a core element of society and the nonprofit workforce in the United States. It is assumed to be a positive activity offering benefits to nonprofits, volunteers, and the community. Yet, raising or justifying funding to support the engagement of volunteers has been a challenge for many agencies. This study explored the reasons for this gap from the perspective of leaders at 27 philanthropic organizations.

The findings revealed that these funders see significant potential within volunteer engagement—and have many questions about whether and how that potential can be achieved through their grant partners.

Highlights from Findings

- Those funders who invest in volunteer engagement do so because it activates and amplifies the perspectives of community members, strengthens overall agency capacity, and/or advances agency and funder goals.
- Funders worry, however, about volunteer commitment, agency capacity to engage volunteers well, and the return-on-investment of involving volunteers. In addition, some funders prefer giving to programs rather than operations, which is where they see volunteerism fitting organizationally.
- Though there are many benefits to engaging volunteers well, funders ask for little data about their impact. The most common data tracked were volunteer hours and numbers, which several funders noted had limited use without context for what those numbers mean to the agency.
- ▼ Volunteer efforts are often essential to nonprofit success but can be overlooked and unseen, perhaps because their contributions are difficult to track and measure in meaningful ways.

Strategic volunteer engagement offers tremendous opportunities and daunting barriers. This study offers insight into how to manage the tension between the two.

We invite you to dive into this entire study and discover the potential of strategic volunteer engagement—and to ensure that volunteers are no longer hidden in plain sight.

BACKGROUND

Purpose

The purpose of this Qualitative study was to better understand if and what funders think about volunteer engagement as well as what actions might motivate increased support for volunteer involvement in America's nonprofits. It is a companion to a quantitative study conducted by the Do Good Institute in Summer 2022 that surveyed funders and nonprofit executives about volunteer involvement and contributions. The survey also asked about how nonprofits and funders invest in volunteer engagement. Taken together, the results of these studies will be used to launch a national conversation about elevating philanthropic support for strategic volunteer engagement and to develop resources that support greater investment.

Funder Participants

There were 27 participants in this study whose roles included chief executives or presidents, directors, program officers, and lead staff. In addition, one of the funders invited two agency Fellows to participate in the interview.

The funders represented family, private, community, and health conversion foundations as well as an independent grantmaking LLC and a public charity. They were located throughout the United States. Their grantmaking was focused on one or more local areas or regions. The causes supported and populations served were broad in scope. None of the funding organizations who commissioned this research were included in the study.



Methods

This qualitative study included three focus groups and 19 interviews in August 2022. All sessions were conducted virtually except for one phone interview. The focus groups lasted up to 75 minutes, and the interviews were 30 to 45 minutes.

The consultant used a semi-structured guide to facilitate the conversations. Each session began with an introduction to the research process, review of consent and uses of the data, and overview of key definitions established for this project. These included defining:

- *volunteerism* as unpaid activity occurring in or for an organization (rather than in a stipended role, such as AmeriCorps members, or in an informal role, such as helping a neighbor).
- volunteer engagement in broad terms to include traditional and skilled volunteering, community organizing, civic or community engagement, and service learning. In the report, the term volunteer engagement is used to include any of these types of funding.
- funding for volunteerism as program or project, operating, capacity-building, or infrastructure grants. Grants did not need to be specifically or exclusively designated for volunteer engagement.

Research Questions

The following research questions guided the study:

Do funders think about volunteer engagement?

How do funders think about volunteer engagement (as defined broadly above)?

For what reasons do funders invest in volunteer engagement?

What are barriers to investing in volunteer engagement?

What evidence would be compelling enough to encourage funders to invest in volunteer engagement?

What and how do funders collect volunteer engagement-related data from their grant partners?





FINDINGS

If and How Funders Think about Volunteer Engagement

IF FUNDERS THINK ABOUT VOLUNTEER ENGAGEMENT

"To be candid, when this [interview] opportunity came up, I realized how little I think about [volunteer engagement]. So that's data, right?"

-COMMUNITY FOUNDATION EXECUTIVE¹

SEVERAL FUNDERS EXPRESSED SURPRISE or hesitation about being asked to participate in the study because they did not make grants for volunteer engagement. They shared that they had never been asked for support in volunteer engagement, nor did they explicitly ask grant partners to apply for it. Other funders noted that they might support volunteer engagement without knowing it because their grants were for operations or general programs. Still others used labels for their investments that they had not considered to be related to volunteer engagement. A few had not initially considered their own work with volunteers to be an internal form of funding. A final group intentionally made grants to volunteer engagement.



1 To maintain confidentiality, funders are identified only by their role and organization type. Each lead quote is from a different funder.

Investing in Strategic Volunteer Engagement: A Qualitative St

HOW FUNDERS THINK ABOUT VOLUNTEER ENGAGEMENT

Terminology and labels

"When we talk about philanthropy, the way we define it is time, talent, treasure, testimonial, and social ties. And if you think about that, treasure is the only word that is not volunteer associated."

-COMMUNITY FOUNDATION EXECUTIVE

The funders that invested in volunteer engagement used a variety of labels for their work. The terms used most often were:

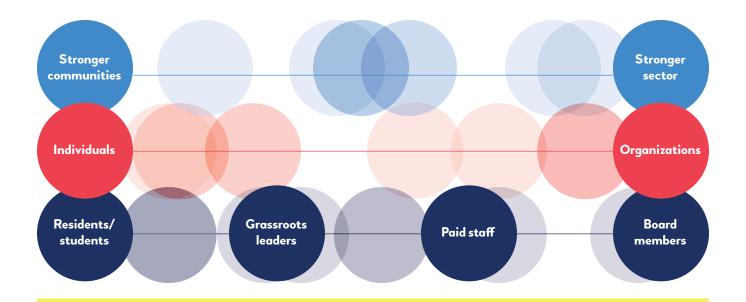
- civic engagement or civic education/health/leadership/participation,
- volunteer engagement or volunteer management/coordination/services,
- advocacy,
- volunteerism,
- board matching or board leadership/education/mentoring, and
- community engagement, community organizing, or community service.

Other descriptions mentioned only once included:

- experiential opportunity or education,
- leadership development,
- service learning,
- resident driven,
- communal infrastructure,
- wide participation, and
- thick connections.

The word cloud below provides an overview of the phrasing funders used.





Volunteer engagement investments did not fall in neat, discrete categories or focus areas. Therefore, it may be more valuable to think of volunteer engagement along a continuum.

For example, some funders made grants to grassroots leaders because they believed that doing so would help them organize and equip individual community members to take positive action and develop a stronger community. Others made capacity-building grants or underwrote a consultant to enhance a nonprofit's ability to engage board members or volunteers. The goal was to improve the organization, the community served, and the nonprofit sector overall.

Types of funding support

"Our...grantmaking includes technical assistance grants that help build the capacity of community-based organizations."

-HEALTH CONVERSION FOUNDATION PROGRAM OFFICER

"We are not leading with civic engagement, [but] we are making sure it's included in our work."

-COMMUNITY FOUNDATION PROGRAM OFFICER

Most of the funders investing in volunteer engagement outside of their organizations framed it as capacity building. Several participants made grants in this area. They provided funding for resources such as training, consulting, coaching, and/or services that match volunteers and board members to nonprofits. This funding was one-time or short-term in nature.

A few funders also made operating grants for one or more years to grant partners that could be deployed at the partner's discretion. One funder gave operating grants to support the community-organizing activities of their partners. More often, the operating grants were given to direct-service organizations that may or may not have allocated the funds to volunteer engagement.

Less frequently, funders made programmatic grants for volunteer engagement. One grant was for civic and board leadership training and another supported a volunteer coordinator who contributed to the delivery of direct services.

Several funders also underwrote efforts to engage volunteers within their own organizations. These included board, grantmaking, events, and advisory council volunteers who made decisions with or recommendations to paid foundation staff. Another funder facilitated a significant multi-year community engagement initiative to engage residents in identifying and addressing local needs. Others supported events or programs to bring community residents together.





Investing in Volunteer Engagement

REASONS FOR INVESTING IN VOLUNTEER ENGAGEMENT

Funders were asked to share their purposes for making grants to volunteer engagement. They supported it because it helped equip community volunteers and enhance nonprofit capacity while also promoting their own goals as a grantmaker. There was a great deal of overlap and nuance between these purposes.

Volunteer engagement equips and activates community members and amplifies their perspectives

"We believe that the voices, especially the voices of disenfranchised or marginalized communities, need to be heard."

-PRIVATE FOUNDATION EXECUTIVE

For some funders, investing in volunteer engagement was a strategy to build individual capacity to act and effect change while also imparting a sense of ownership in the community. Volunteer engagement helped foster connections between residents from diverse backgrounds in terms of socioeconomic status, age, race, geographic area, profession, etc. This approach elevated everyday voices from the community, not just those with money, authority, or other forms of power, which helped redistribute power more evenly. It also provided a pathway for individuals to share their insight, expertise, and local knowledge.

Volunteer engagement strengthens and builds organization capacity

"We have funded positions for volunteer coordinators that help them build the capacity...to help those organizations attract and grow...and manage volunteers"

-FAMILY FOUNDATION PROGRAM OFFICER

Funders also invested in volunteer engagement because it developed the capacity of nonprofits' volunteers, board members, or paid staff, which strengthened the organization overall. Capacity-building grants for coaching, training, and consulting brought outside resources and expertise into the organization for low to no fee on topics such as board development, policy change, advocacy, or volunteer management. Most funders emphasized one audience (such as board members) and one type of intervention (such as consulting). Less frequently, funders underwrote personnel costs or other operational costs.

Volunteer engagement advances organization and funder goals

"There were all these...organizations who...found ways to engage volunteers. If we could build their capacity, [we] can serve more kids [the foundation's mission]...Having that infrastructure built for them at their organization makes everything stronger."

-PRIVATE FOUNDATION EXECUTIVE

Many participants observed that supporting volunteer engagement helped agencies meet their goals while also making it possible for funders to transform their own vision, mission, strategy, or values into action. Several funders shared that volunteers are a critical part of how their grant partners "get the work done" by tapping people power, lived expertise, and community knowledge. Without volunteers, or with fewer volunteers, agencies' ability to serve their constituents would be hampered, a fact underscored by reduced volunteer involvement during COVID-19. And as two participants noted, funding volunteer engagement was part of their responsive grantmaking strategy: it's what their grant partners asked for.

BARRIERS TO INVESTING IN VOLUNTEER ENGAGEMENT

Funders also identified many concerns about investing in volunteer engagement. They worried about the effectiveness, feasibility, and sustainability of volunteer involvement when faced with hard choices on how to spend limited money.

Volunteer engagement lacks control and accountability for volunteers

"There are fewer guard rails for how [volunteers] work."

-PRIVATE FOUNDATION LEAD STAFF MEMBER

Funders shared reluctance to invest in volunteer engagement out of fear that volunteers might not be accountable to the agency or could go "rogue". There was a perception that since volunteers did not receive paychecks or may not receive performance reviews, that they would not have to meet the same standards that paid staff did. One funder questioned if volunteers could deliver a program with fidelity to the model while others suggested that detailed tasks were better suited for paid staff.





Agencies lack capacity, infrastructure, or sustainability of volunteer engagement

"The little [nonprofits] didn't have the capacity to properly manage volunteers...[volunteers] are assets that need to be nurtured, recruited, and cared for. You just can't tell them what to do on Tuesday."

-PRIVATE FOUNDATION EXECUTIVE

Some funders noted that a lack of capacity and infrastructure to engage volunteers well, particularly at smaller organizations, was a barrier to funding. A few others suggested that engaging volunteers was perceived by thinly stretched nonprofit teams to take too much work. A couple funders observed that the operational costs of engaging volunteers might not look sustainable because volunteer engagement takes an ongoing commitment of time and money.

Volunteers demonstrate low retention

"Volunteers may not stick around. Are they worth the investment because we don't have anything to hold them to their commitment?"

-PRIVATE FOUNDATION PROGRAM OFFICER

Funders also worried about investing in volunteers because they were perceived to be a less stable workforce than paid staff. Funders wondered if volunteers could be trusted, if they cared or were committed enough to stay without a paycheck to retain them. Given these concerns, paid staff seemed like a wiser investment than volunteers to several funders.

Volunteer engagement has uncertain benefits and results

"The cynical side of me says, 'Is it going to produce anything?'"

-HEALTHCARE CONVERSION FOUNDATION EXECUTIVE

Funders could not always see a value add to investing in volunteer engagement. They observed that sometimes volunteerism doesn't work out making it a questionable investment. Others wondered what the cost of free labor or the net benefit of engaging volunteers really was. Two others suggested that some volunteerism was a feel-good event or engagement mechanism for fundraising rather than being a high-impact or community-driven experience. As a result, it was difficult to consider volunteer engagement a compelling investment.

Funders prefer to give to programs rather than the operations that support programs

"[Many funders] want to see...direct service impact more than they want to see support for the organization. But I can tell you after having funded a couple of organizations that went belly up afterwards, that's what made it clear to me: we have to make sure that the organization is stabilized because all the rest of our money is going to go down the drain [if not]."

-FAMILY FOUNDATION EXECUTIVE

Several funders suggested that other grantmakers might shy away from giving to volunteer engagement because they preferred to give to programs, clients, or outcomes instead of operations. They observed that newer funders, specifically, seemed to be less aware of how important strong operations were to every other kind of success and outcome. In addition, limited knowledge about the importance of paid and unpaid labor for supporting programs meant that volunteer-related investments would be a hard sell.

Volunteer engagement is not a nonprofit priority or part of their grant request

"[Nonprofits] don't build up the volunteer parts and the need...if you're not going to sell it, why would we?"

-PRIVATE FOUNDATION EXECUTIVE

Finally, some funders suggested that they are not hearing their grant applicants ask for volunteer engagement funding because it is not a priority for the nonprofit. Two pointed out that it might be a function of nonprofits being in survival mode; it is difficult to be creative when just trying to keep one's head above water. Another observed that many nonprofit leaders she knows have not considered how to engage skill-based volunteers or other talent in the community. One funder in a focus group agreed that it rarely comes up from grantees—and that the nonprofit boards he sits on don't discuss volunteer-related items either.

Volunteer Engagement Data

COMPELLING EVIDENCE

The project team was especially interested in identifying which data would help make a case for investing in volunteer engagement. Funders suggested highlighting volunteer engagement benefits and return on investment while using raw numbers judiciously. They also recommended identifying the diverse ripple effects of involving volunteers.

Benefits and results of engaging volunteers

"We have to have something that provides an enriching and fulfilling experience but also is beneficial then to the organization."

-COMMUNITY FOUNDATION IMPACT DIRECTOR

Many funders suggested that it would be helpful for nonprofits to identify the specific ways that volunteer contributions support the organization and the people it serves. This was an opportunity to talk about how the work of the organization gets accomplished and what volunteers do to support that work. A couple funders pointed out that they support agencies that would not be able to operate without volunteer involvement, especially as the needs for service have increased through the pandemic. Most respondents discussed volunteers' impact on the agency or community, but a couple noted that volunteers often receive benefits from serving as well.



Leverage, value add, and return on investment (ROI)

"The idea that we're providing this leverage by engaging volunteers and really helping to double the impact of their dollar. They [the board] love that. They eat that stuff up."

-PRIVATE FOUNDATION EXECUTIVE

Another popular suggestion was to highlight the ways that volunteers are a value add for the agency. This ranged from calculating a specific dollar amount of ROI to more general explanations about how much further money goes when an agency engages volunteers. To that end, some funders suggested sharing how volunteers helped the organization run more efficiently and/or effectively or how they improved processes and agency capacity.

Numbers and dollars—with a caveat

"There's a lot of things in volunteerism that look like hard numbers, but there's a lot more nuance to what the real value and contribution of volunteers is."

-PRIVATE FOUNDATION PROGRAM OFFICER

Often, the first response to identifying compelling evidence was to recommend reporting numbers of volunteers, volunteer hours, the financial value of volunteer time, and/or dollars saved by engaging volunteers. However, many funders followed up those figures with a question about their merit. They wanted to know what those statistics represented because the raw numbers alone did not relay the benefits and ripple effects of having volunteers nor did bigger numbers equate to better outcomes. As one funder whose prior organization engaged volunteers noted: they got up to 400 volunteers total but performed better with 200.

Pathways to other funder or nonprofit goals

"Organizations that we've funded present their slate of board members'...personal contributions [and] how the board member connected them to a number of other funders. And the board member was a volunteer."

-FAMILY FOUNDATION PROGRAM OFFICER

Volunteers were also an important part of the network effect, according to some funders. They could help initiate and cultivate relationships within and beyond the agency. They could be a conduit to new board members or volunteers or make connections to potential donors. In one case, volunteers were substantial donors who ended up providing a de facto match for the funder's grant. Other funders suggested the additional expertise, lived experience, or connections of volunteers were key features for nonprofits to highlight.



WHAT FUNDERS ASK AND COLLECT ABOUT VOLUNTEER ENGAGEMENT

Despite the diverse purposes given to invest in volunteer engagement and the numerous data points suggested as compelling evidence, the amount of information tracked by funders was rather limited.

Data tracked

"We're a smaller family foundation...we're really not doing anything to track [volunteer engagement]."

-FAMILY FOUNDATION EXECUTIVE

Many funders shared that they do not ask for or collect any data related to volunteerism. Of those who did, they most commonly requested the annual number of volunteers and volunteer hours contributed or stories about volunteer efforts. One funder tracked the number of organizations posting and filling projects through a volunteer-matching platform as well as the money saved by having a volunteer complete a pro bono project rather than a paid consultant. Other information sought included: how volunteers were trained, who pays for background checks, to what extent the community was represented (in leadership or programming roles), what issues volunteer advocates advanced, volunteer retention, or volunteer satisfaction. Two funders referenced program or community benchmarks to see if volunteer efforts were making a positive difference. Another recently began asking about what happened to agency volunteers during the pandemic given that so many nonprofits struggled to provide services without them.

Data collection vehicles

"We have a general question on our grant application about how [the grant partner] might engage volunteers. But I wouldn't say that we've done a lot, as much as we could, with that information."

-HEALTH CONVERSION FOUNDATION PROGRAM OFFICER

The mechanisms for collecting these data were limited as well. Those who asked about volunteer engagement usually did so through informal conversations and check ins. To a lesser extent, funders gathered information through grant applications, reports, or site visits. Two funders received reports about volunteerism through an intermediary, such as a volunteer-matching entity or a company that conducts broad-based organizational assessment.

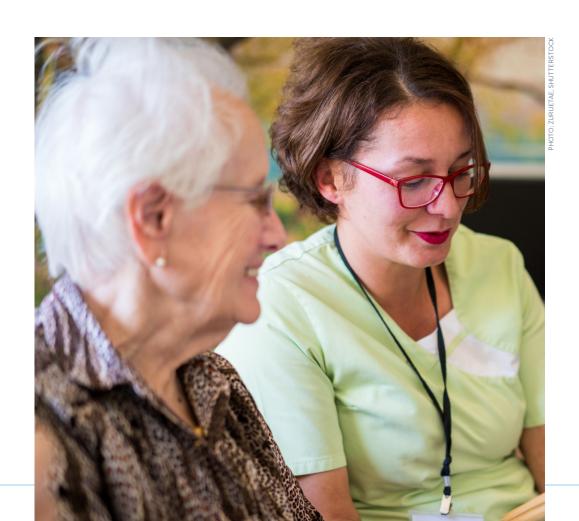
INSIGHTS

SERVICE IS OFTEN ASSUMED TO BE A POSITIVE ACTIVITY with benefits for the community served, the volunteers, and the nonprofits that engage them. Volunteers are held up as pillars of the community, ready for anything from big disasters to small acts of kindness. Public affirmation from nonprofit leaders about community volunteers suggests that they are enthusiastic hosts to those who wish to serve.

Reality is a bit more complicated. Yes, volunteers and volunteer engagement have a great deal of potential to be positive. No, it does not happen automatically. This study begins to uncover the nuance within volunteerism and how that influences its funding by grantmakers. The insights below help reveal some of volunteer engagement's complexity.

LABELS AND CONCEPTUALIZATIONS FOR VOLUNTEER ENGAGEMENT: WHAT'S IN A NAME?

- ★ Labels for volunteer engagement mean different things to different people, even when they are using the same words. Civic engagement, for example, covered a wide range of activities.
- * Preconceived notions about volunteer engagement can hinder people from understanding conceptualizations that differ from their own.



IMPACT OF VOLUNTEERS: HIDDEN IN PLAIN SIGHT

- Volunteers are an essential part of the nonprofit workforce. For many organizations, they are how the work gets done, yet volunteer efforts can go overlooked and unseen.
- Funders invest in and nonprofits involve volunteers for many reasons that benefit the agency, community served, volunteer, and/or grantmakers. However, volunteer contributions can be hard to see, track, and measure.

NATURE OF VOLUNTEER ENGAGEMENT FUNDING: HOLISTIC NEEDS, NARROW AND FRAGMENTED FUNDING

- Most grants were not made explicitly for volunteer engagement alone. Instead, funding volunteer engagement was part of a broader capacity-building, operating, or program grant.
- ★ Giving to volunteer engagement is relatively focused, narrow, and fragmented.
 It tends to:
 - be one-time or short-term funding;
 - focus on one audience at a time (e.g., individual volunteers/community members, grassroots leaders, board members, executive directors, or volunteer managers, etc.);
 - emphasize one type of volunteer engagement (e.g., community organizing, advocacy, service learning, volunteer management, or community conversations, etc.); and
 - address one type of intervention (e.g., coaching, consulting, funded volunteer coordinator, or matching service, etc.).



TENSIONS: THE PUSH-PULL OF INVESTING IN VOLUNTEER ENGAGEMENT

Funder responses revealed that there are tensions involved in investing in volunteer engagement.

- There are many reasons to invest in volunteer engagement that help volunteers, nonprofits, and funders alike, but there are also significant questions about the quality, accountability, commitment, and productivity of volunteers that can negatively impact funders' (and nonprofits') willingness to invest.
- ★ There are many ways to demonstrate volunteer contributions but even funders who invested in volunteer engagement asked few questions and tracked little data about those contributions.
- There are many benefits from involving volunteers but agencies cannot realize these benefits without a sufficient investment of time, money, and expertise.
- Many funders suggested that volunteer engagement can benefit from capacity-building investments and should ultimately be part of an agency's operations budget, but unrestricted operations grants are limited and it seems that both nonprofits and funders struggle to prioritize funding volunteer engagement when the outcomes seem uncertain.

WHY IS IT SO HARD TO GENERATE FUNDING SUPPORT FOR VOLUNTEER ENGAGEMENT?

Part of the motivation for this study is to encourage more investment in volunteer engagement. The responses helped illuminate why this is such a challenge.

- * There are many obstacles to successful and strategic volunteer engagement.
 - It takes time, effort, and funding to engage volunteers at all—and especially to engage them well.
 - Volunteer engagement can be particularly taxing for organizations struggling with limited capacity or imagination about how to involve the community.
 - There are a variety of benefits to engaging volunteers, but they can be spread across the organization, difficult to see, and even more difficult to measure.
 - There are few external mechanisms that require or encourage effective volunteer engagement.
 - The return on investment in volunteer engagement is uncertain for some funders and nonprofit leaders.
 - The available funding for volunteer engagement (one time, capacity building, single audience) does not align with the ongoing, operating, multi-audience nature of volunteer engagement expenses.
- ♠ Each one of these challenges individually can be an impediment to investing in volunteer engagement. The cumulative effect helps explain the current state of funding for volunteer engagement.



RECOMMENDATIONS

WRESTLING WITH UNCERTAINTY

One of the fundamental issues that arose in this study was uncertainty about volunteer engagement as an effective strategy for nonprofits to meet their missions, even among some of the funders who were investing in it. Funders wondered: is volunteer engagement worth it? How is "worth it" defined? What conditions are necessary to make volunteer engagement worth it? And of course, where will the funding come from to underwrite it year in and year out?

These questions cannot be resolved in a checklist of easy action steps. However, the following recommendations provide a starting point for engaging with uncertainty. They can serve as a companion for those who see the potential for volunteer engagement to be worth it for their grant partners, their communities, and themselves.

GAIN CLARITY

- Explore and identify beliefs about volunteers and volunteer engagement. In what ways do these understandings support or hinder the prospect of investing in volunteer engagement?
- Determine if and how funding volunteer engagement can help advance grantmaker goals.
- ♠ Define volunteer engagement explicitly as a team. Communicate that definition to grant partners and prospects. Be clear about what it includes and excludes—or whether there is flexibility for grant partners' to use their own definitions.



MAKE VOLUNTEER ENGAGEMENT VISIBLE

- ♠ Include questions in the grant application or inquiry process about how volunteers contribute to an agency's mission, program, and/or operations.
- Ask for updates about volunteer impact and dilemmas during check-in conversations, site visits, and grant reports.
- ♠ Invite grant partners to select and share data points about volunteer efforts that are meaningful and relevant to them. Welcome quantitative and qualitative information that reflects their mission and values as well as financial goals. Consider volunteer impact on the agency, community served, and those serving.
- * Consult resources and tools on the <u>Initiative for Strategic Volunteer Engagement's</u> website.

FUND HOLISTICALLY

- Provide funding for operations, particularly multi-year grants, to give nonprofit leaders the resources and flexibility to invest money where it is needed most, including volunteer engagement personnel, systems, matching portals, or training.
- Alternatively, follow up volunteer engagement capacity-building grants with additional resources to help sustain the work. Work with grant partners to determine what the next needed steps and funding are.
- Consider partnering with other funders to support volunteer engagement audiences, grant types, or interventions beyond your scope to help deepen the nonprofit's (and community's) success.
- ★ Use resources such as the Full-Cost Project or Trust-Based Philanthropy to help make the case for funding volunteer engagement to board members or to support nonprofit leaders in doing the same.

MANAGE AND USE TENSION

- Facilitate internal and external conversations about volunteer engagement concerns such as volunteer retention and work quality. Work collectively to identify the conditions that lead to higher levels of retention and quality and the resources needed to create those conditions.
- Recognize and identify the tensions that arise in funding related to volunteer engagement. Engage directly with the issues and those involved rather than avoiding the topic or declining a grant outright.





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