

# Engaging Retired Leaders as Volunteers

**A Resource Manual for Nonprofit and  
Charitable Organizations**

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The logo for Canada, featuring the word "Canada" in a serif font with a small maple leaf above the letter "a".

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# Engaging Retired Leaders As Volunteers

## Introduction

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This resource manual has been prepared for managers of volunteer resources and others in the nonprofit sector who are interested in attracting retired business and public sector leaders to volunteering. It is based on the findings of a study conducted with a group of leaders in Victoria, British Columbia who were either retired or close to retirement. It offers strategies that nonprofit and charitable organizations can use to successfully recruit these highly skilled and experienced individuals as volunteers.

## The challenge

The nonprofit and charitable sector is currently facing several significant challenges:

- This is a time of diminishing revenues and increasing competition for available resources.
- Managing programs and services requires increasing innovation and sophistication.
- The number of skilled and committed volunteers, particularly those who are interested in management and administration, is decreasing.<sup>1</sup>
- Volunteerism is declining across the country: the percentage of individuals engaged in volunteering fell from 31% in 1997 to 27% in 2000.<sup>2</sup>

These trends do not appear likely to change in the near future.

## The opportunity

Faced with such significant challenges, nonprofit and charitable organizations must find ways to attract new groups of people to volunteering. One such group is business and public sector leaders who will be retiring in significant numbers over the next five years. This boomer generation of leaders possesses a number of assets:<sup>3</sup>

- The large size of this boomer group is impressive and their life expectancy is longer.<sup>4</sup>
- They are highly educated, skilled, active, and financially secure.
- They are proven managers of people, finances, and complex programs.
- They understand the benefits of meaningful work and are motivated to contribute to society.
- They are open to new ways of managing their time and using their talents.

The knowledge, experience, and energy of these leaders who are either retired or close to retirement represents a great potential resource for the nonprofit and charitable sector. However, organizations will have to take special steps if they hope to tap this

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<sup>1</sup> See *The Capacity to Serve*, Hall, Andrukow, Barr, Brock, de Wit, Embuldeniya, Jolin, Lasby, et al (2003).

<sup>2</sup> See *Caring Canadians, Involved Canadians*, Hall, McKeown, & Roberts (2001).

<sup>3</sup> Definition of boomer: Someone born between 1945 and 1959 when the servicemen returned home after World War II.

<sup>4</sup> See *The Nonprofit Boon from Boomers*, Salls (2004).

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resource. The experience of Volunteer Victoria suggests that these leaders do not necessarily view volunteering as a post-retirement activity of choice.<sup>5</sup> Some perceive volunteering as largely unchallenging support work. Others view nonprofit and charitable organizations as inefficient and possibly frustrating to work for. Our research study attempted to investigate and develop constructive responses to these views.

## Meeting the challenge

This is an ideal time for the nonprofit and charitable sector to mobilize the talents of a highly skilled pool of potential volunteers such as retired or close to retirement business and public sector leaders. Doing so would benefit both the community and retired leaders themselves, as volunteers generally enjoy improved health and wellness compared to the general population (Community Council, 1999).<sup>6</sup>

Before nonprofit and charitable organizations can successfully recruit and involve retired business and public sector leaders, they must first understand the needs, motivations, and retirement goals of this group and adapt their volunteer recruitment strategies accordingly.

## Research goals and methodology

In the spring of 2004, Volunteer Victoria undertook a research study of business, public, and a few nonprofit sector leaders in Victoria who were either retired or close to retirement. Spark Group Management Consulting carried out the research.

The individuals who participated in our study were all recognized as major contributors within their organizations and had a sphere of influence beyond their immediate workplace. They included CEOs, accomplished academics with administration responsibilities, union leaders, and small business owners who were involved in service club leadership.

The purpose of the study was to create a profile of business and public sector leaders and to gain greater insight into their volunteer potential. We sought to understand the needs of this group and to identify any perceived barriers to volunteering. This information can help nonprofit and charitable organizations develop volunteer promotion and recruitment strategies specifically for this group.

Our research activities included the following:

- a literature review;
- selection of a representative sample of 71 business and public sector leaders in Greater Victoria who were either retired or close to retirement;
- focus groups that were followed up with small group discussions and individual interviews;<sup>7</sup>
- development of a 24-item questionnaire survey based on the literature review and input from participants at initial focus group meetings;
- analysis of data;
- preparation of a research report and this manual.

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<sup>5</sup> *Volunteer Victoria*: [www.volunteervictoria.bc.ca](http://www.volunteervictoria.bc.ca) (Last retrieved June 27, 2005).

<sup>6</sup> For more information about the quality of life in Victoria see [www.communitycouncil.ca](http://www.communitycouncil.ca).

<sup>7</sup> All participants completed the survey, and over half took part in the initial focus groups and subsequent small-group discussions to deepen their input into the topic.

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## Overview of Research Findings

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This section summarizes key findings of the study.

### Profile of the leaders who participated in our study

#### *Personal and economic characteristics*

- Eighty-two per cent (82%) of the leaders in this study were males, of these 67% were 55 years of age and older.
- Virtually all (97%) had a post-secondary education; 85% had at least one university degree.
- The majority (74%) had annual incomes of \$76,000 or greater. Most participants (75%) reported that their income level was sufficient for their needs.
- Four out of five reported being in very good health.

#### *Work experience*

- Participant employers reflected the mix of employers in the Greater Victoria Region: government (42%), business (39%), universities and colleges (11%), nonprofit and charitable organizations (4%), and others (4%).
- Retired or soon to be retired participants held, or had held, senior positions within their organization, such as executive directors, directors, and deputies (24%); presidents and CEOs (16%); managers (16%); deputy ministers or assistant deputy ministers (9%); deans and principals (8%); consultants (5%); and owners/proprietors (22%).
- Participants had high-level skills. Most had experience in strategic planning (90%); development of missions, visions, values (83%); policy development (82%); project design and management (79%); program management (77%);

monitoring and evaluation (73%); and mentoring and coaching (70%).<sup>8</sup>

#### *Volunteer experience*

- The majority of participants indicated that they were currently volunteering (86%) or had volunteered in the past (90%).
- The types of organizations for which they volunteered included social service organizations (55%), arts and culture organizations (49%), political organizations (44%), and sports organizations (43%).
- No relationship was found between the presence of an employer-supported volunteer program and the number of volunteer activities in which the participants were currently involved.
- Retiree leaders with previous volunteer experience identified satisfaction in helping others as their main reason for volunteering.

#### *Retirement plans*

- Most of the participants in this study (61%) were expected to retire within five years.
- Only 18% of participants planned to stop working after they retired. Others planned to work fewer hours (32%), become self-employed (25%), change the kind of work they do (24%), never stop working (14%), or continue working in their present roles (10%).
- Participants' retirement goals included travel (76%), recreation (65%), household and family activities (41%), and education (27%). Only 18% of participants identified volunteering as a goal when asked about their retirement goals in general.

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<sup>8</sup> Please note that leaders often indicated they had two or more skills so percentages do not add up to 100%.

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## Future volunteering

- When we asked participants specifically if volunteering was of interest to them as a future retirement activity, 86% indicated that it was. These differing responses between retirement goals and retirement plans suggest some ambivalence in terms of the priority placed on volunteering vis-à-vis other interests and activities.
- Over one third of participants (39%) indicated that they would prefer to find new volunteer opportunities instead of continuing with their current volunteer commitment.
- Another 39% said that they planned to pursue new volunteer opportunities in addition to continuing with their current commitments.
- Twenty-three percent (23%) indicated that they would prefer to continue with their current volunteer activities only.
- Although only 33% of participants said they had a moderate understanding of the nonprofit and charitable sector, two thirds (66%) said that more information about volunteer services and opportunities would increase awareness of and commitment to volunteering.
- Participants reported that volunteering might fulfill a number of post-retirement needs and interests, including learning (73%), helping others (65%), forging new relationships (63%), engaging in meaningful work (62%), and teaching and mentoring (51%).
- Participants identified the following as the types of organizations for which they would prefer to volunteer in the future: education and training (56%), social service organizations (45%), arts and culture organizations (42%), service clubs (34%), environmental organizations (34%), sports

organizations (31%), health organizations (28%), and political organizations (27%).

## Barriers to future volunteering

- Approximately half (51%) of participants identified lack of time as the greatest barrier to their volunteering in the future.
- Other barriers participants identified included lack of meaningful or challenging work (38%), restrictions that volunteering would place on freedom to travel (38%), lack of information about volunteering (23%), and confusion about volunteer roles (15%).

## Implications of the research findings

A group of highly skilled business and public sector leaders is making the transition from paid employment to retirement at a time when nonprofit and charitable organizations need skilled and experienced volunteers. The trend to early retirement means that these individuals are probably younger and have more energy than retirees in the past. The fact that over 80% of participants said that they planned to continue working at least to some extent after they retired, but not out of economic necessity, suggests that these people are seeking stimulation and involvement without the stress inherent in their current executive or leadership positions.

Although most participants were expert planners in their professional lives, few had a comprehensive plan for retirement. However, the majority viewed volunteering as a possibly important component of their new, and more balanced, post-retirement lives. Indeed, 86% expressed interest in having the opportunity to serve as volunteers. In order to take advantage of this interest, volunteering must be promoted appropriately, so as to attract and engage these individuals.

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## How to Recruit and Retain Retired Leaders

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A better understanding of the needs and views of leaders who are retired or close to retirement can help nonprofit and charitable organizations understand how to involve these individuals as volunteers. Based on the findings from our study, we suggest that organizations will have to use a focused approach to successfully recruit and retain retired leaders. In this part of our manual we suggest five possible steps that organizations might take to engage retired leaders. These steps have been designed based on our research findings and combined with recommendations commonly found in volunteer recruitment and management guides.

### Step 1: Build pre-retirement awareness of volunteering

The majority of business and public sector leaders in our study planned to continue in some form of paid employment after they retired from their current positions. Nevertheless, they saw retirement as a time of transition to a more balanced life. Volunteering has the potential to contribute to this balance.

You should, however, understand that the retirement plans of many people, including leaders who are still in the workforce, are often fluid and incomplete. Although people may say that they are very committed to volunteering as a key ingredient of their new lives, our research found this commitment could diminish in the face of competing interests. Maintaining this interest requires active promotion of volunteering to these leaders.



For example, Paul Battershill, Chief of Police commented:

*“I would like to divide my retirement into one third travel and relaxation, one third paid contract work, and one third volunteer contract work.”*

Participants in our study suggested that nonprofit and charitable organizations should adopt active volunteer recruitment approaches that are tailored specifically to leaders of business and public institutions. (For example, the method used to recruit participants for this study – locating and extending a personal invitation to leaders who were retired or near retirement – proved to be particularly successful.) Charitable and nonprofit organizations may want to consider approaching these individuals directly a few years before they actually retire to promote volunteering as part of their balanced retirement plans or even to get them actively engaged in volunteering before they retire. Encouraging active engagement in volunteering prior to retirement might ensure further volunteering once people are retired.

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## ***Making contact and promoting volunteering***

Our research indicated that promoting volunteerism to leaders in business and public organizations requires an active and focused approach. Here are some suggestions for actions that will promote volunteering:

1. Identify organizations in the private and public sectors and ask if you can make presentations at corporate and government retirement seminars on the benefits of volunteering and its value to the community.
2. Go directly to business and public sector leaders to explain what your organization does. Make it easy for leaders to get information about the benefits of volunteering by inviting them to hear your message over lunch or a light supper in the late afternoon.
3. Combine personal contact and presentations with seeking donated advertisement space in the careers section of your local newspaper. The careers section is a highly visible source of information for leaders in transition. Volunteer opportunities could be advertised with information about required skills, timelines, and benefits.
4. Participants in our study indicated that they would be willing to volunteer for a cause they care about and can feel useful in serving. In your recruitment message, be sure to include a clear explanation of how the skills of retired leaders' would be an asset to your cause.
5. Offer prospective volunteers an opportunity to meet key people in your organization so that they can get a good understanding of how the organization operates.
6. Try to build up new information networks and strengthen old ones so that the potential number of people who can be contacted about volunteering grows.
7. Remember that these leaders want information. Provide them with a comprehensive package that includes your annual report, mission statement, goals, programs, etc.
8. Accept that your organization will have to expend more time and effort to reach out to leaders, as they are busy juggling competing interests, both professional and personal. They are unlikely to seek out contact with volunteer organizations on their own.
9. Ensure that there are follow-up group sessions to consolidate people's interest in volunteering.



As one of the participants in our study, Brooke Tomlin commented:

*“Volunteer agencies should consider more outreach. Ask us and we will respond positively.”*

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## Step 2: Recruit leaders

In the process of promoting volunteerism to business and public sector leaders who are retired or close to retirement, you need to try and gain commitment to volunteering. Here are some ways to attract and recruit these individuals:

1. Personally ask them to consider joining your organization as a volunteer. The value of a personal invitation cannot be over-emphasized. This is especially true for retired leaders.
2. Involve their peers in recruitment. Participant leaders in our study indicated that they would be more likely to respond positively to a request to volunteer if their peers, who are already volunteering, asked them to help.
3. Be clear what your volunteer activities will entail in terms of time commitment. Leaders can judge how they will fit activities into their schedules.
4. Be clear about what range of skills, knowledge, and experience you need for your various volunteer programs.
5. Provide these leaders with ample opportunity to fully explore the volunteer options your organization can provide.
6. Encourage retired leaders currently volunteering for your organization to share their experiences with potential recruits among leaders from other sectors.

## Step 3: Design suitable volunteer opportunities

Our study revealed that leaders vary in their understanding and interest in volunteering. So to attract leaders who are retired or close to retirement, you need to provide them with information and design

volunteer activities that will attract them. When thinking about how to design volunteer opportunities for retired or close to retirement business and public sector leaders, here are some suggestions:

1. Make sure that potential recruits are aware of the complete range of volunteer opportunities you have to offer.
2. Provide descriptions of volunteer activities that reflect their true nature. The participants in our study expressed concern that they might respond to a challenging job description only to find that the actual work was less stimulating than advertised.
3. Make sure volunteer opportunities have specific targets and deliverables. Participants in our study indicated that they would be attracted to volunteer activities that have clear job descriptions, require specific skills, and have well-defined expectations and timelines.
4. Provide short-term volunteer opportunities. This was strongly emphasized by the participants in our study. Retired leaders who face competing interests and time restrictions will be more likely to respond positively to short-term, volunteer activities with tangible outcomes.
5. Ensure that volunteer opportunities are innovative and complex enough that they will meet the desire of this group for challenging and meaningful work (e.g. developing a marketing plan, participating in a mentoring program, designing curriculum for a new program, or conducting client group research).
6. Involve volunteers in selecting and designing their volunteer activity to help ensure that it meets the needs of your organization and also those of the volunteer.
7. Be clear about whether there will be pressure to adopt demanding leadership roles. At the outset,

many participants in our study reported that they want a change of pace when they retire and did not want to take on leadership responsibilities as part of their volunteer experience.

8. Have an open discussion with these prospective volunteers about perceived and actual barriers to their involvement as volunteers. These discussions are best done in small groups, which allow participants to share perspectives and experiences. Out of these discussions you can identify the characteristics of suitable volunteer activities that are attractive to these leaders.



Another of our participants, Brian Pollick, a company director, commented:

*“I don’t want to replicate what I do at work. I don’t want to run the volunteer organization, but would be willing to act as a mentor, teacher who develops others to be effective leaders.”*

9. Arrange for volunteer opportunities that will allow potential recruits to volunteer with their peers. This will make the volunteer activity more attractive as many participant leaders in our study commented that they looked to form new relationships when volunteering.



Paul Arsenault, Lieutenant, Department of National Defence commented:

*“I don’t want an unpaid job. I would not want to run the show, but would consider being a part of a task group doing project-oriented work.”*

#### **Step 4: Provide orientation and support**

After you have successfully recruited retired leaders to be volunteers with your organization, you will need to take steps to help them succeed in their new roles.

1. Tailor your initial orientation session to their information needs. Not all retired leaders have

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had experience as volunteers. Do not assume they know more or less than they actually do. Some may need a general overview of the nonprofit and charitable sector in addition to information about your organization and its specific programs.

2. Provide training for retired leaders who are taking volunteer positions that require them to learn new skills or tackle unfamiliar tasks. Volunteers may become frustrated if they are not given the training they need to succeed in their new volunteer positions.
3. Provide ongoing support. Many of the participants in our study stressed the need for support. Although all volunteers want to feel that they have the tools to succeed, the concern expressed by leaders in our study may reflect the uncertainty that they might feel moving into a new area without their usual level of expertise and authority.
4. Remember that this group is making a transition from leader to learner. It may take time for retired leaders to feel comfortable.
5. Involve peers as trainers. Participants in our study expressed a desire to have peer volunteers provide support and training. Having seasoned retired leaders work with newer retired leaders will help the newer volunteers adapt and build a strong network that your organization can use for further recruitment.
6. Be flexible in your time-commitment and scheduling expectations. Participants in our study indicated that they expect to have more time for a wide range of activities after they retire (e.g. travel, family, continued education). Seventy-six per cent (76%) named travel as a retirement goal. Eighteen per cent (18%) said that they planned to stop working entirely after they retired. Do not expect or

require these volunteers to be available year-round. Be prepared to discuss with them how best to fit their volunteer responsibilities into their new lives.

## **Step 5: Retain your volunteers**

After you have recruited and placed your retired leaders in volunteer positions, you will need to take steps to keep them involved. Proper support and recognition will keep them coming back to do more.

### ***Set boundaries for volunteer activities***

In our study, the leaders expressed concern that the boundaries for any volunteer activity should be clear to prevent them being drawn into solving organizational issues. This is a reflection of not wanting to take on the same responsibilities and stress that they have experienced in being leaders before they retired.

### ***Recognize the contributions of your volunteers***

Participants identified recognition – a vital component of any volunteer program – as very important because these leaders are likely to have had significant recognition during their careers. Recognition might include a note of gratitude from the president of the board, a write-up in one of your organization's publications (e.g. newsletter, annual report), or public acknowledgement at your annual general meeting.

### ***Provide training and development opportunities***

Professional and personal development is an integral part of the careers of business and public sector leaders. Many are highly accomplished and want further chances to build up their experience and knowledge after retirement. Participants in our study indicated that volunteer opportunities should

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incorporate the possibility of further learning in order to attract and retain them as volunteers.



Michelle Gagnier, a private school educator, commented that:

*“A service that matches my needs, passions, interests, and hobbies to the needs of a volunteer agency would help me determine if and how I could volunteer, but I wouldn’t want to work with a group that needed a lot of organization because then I would be back doing the kind of work I retired from.”*

### **Provide networking opportunities**

Participants in our study expressed interest in developing new relationships while volunteering. The study revealed a sense of camaraderie among those who have been isolated in leadership positions for many years. Providing opportunities for these volunteers to network with their peers would help to make their volunteer experience more satisfying. This could be achieved through joint work assignments or

get-togethers where retired leaders can share their experiences and exchange information.

### **Set up special teams**

Participants in our study liked the idea of working in small peer teams in areas where a combination of their diverse skills and varied expertise would be of particular benefit. One focus group came up with the concept of a SWAT unit (skilled, willing, action team) that could come in and help nonprofit organizations with specific tasks. Even participants who initially expressed little interest in volunteering responded positively to this idea.



Thelma Midori, a college educator commented:

*“Consider developing a SWAT approach that does project work around start-up and clean-up and then passes back to the volunteer agency to manage.”*

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## *A special peer-coordinated initiative*

Participants in our study suggested that there should be a peer-run volunteer promotion and information unit for retiree leaders. An existing volunteer centre could provide the base for such an initiative. Retired leaders would serve as volunteer coordinators and be charged with identifying, recruiting, placing, and supporting their peers. Because these volunteer coordinators would come from the same sort of professional background as their recruits, this would make it easier for them to communicate with other retired leaders, to see how to make best use of their skills, and to ensure that they get the support they need.

Here's how a volunteer centre or group of nonprofit organizations might make this work:

1. Develop a special retired leadership unit as a pilot project.
2. Provide minimum support services (e.g. space, equipment) to the unit.
3. Recruit retired business, public, and nonprofit sector leaders to develop and implement a volunteer program to identify, recruit, place, and retain their peers.
4. Assign a seasoned manager of volunteers to provide training and consultation to these new coordinators.
5. Establish goals and objectives for the unit, in collaboration with the retired leader unit coordinators.

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## Summary of Findings

Although retired leaders have a lot to offer to nonprofit and charitable organizations, they can also afford to be selective about how and where to volunteer. In order to attract and retain these volunteers, organizations must provide a receptive venue and offer appropriate levels of rewards and challenges. Here is a summary of general points that managers of volunteers should keep in mind:

1. Retirement is a transition period for leaders during which they may experience a sense of loss and confusion. Their needs and interests may vary as they adjust to their new lives. A high degree of sensitivity is required to help leaders work through these issues.
2. Not all leaders want to take on leadership roles after they retire. They should be allowed to provide a direct service to the organization instead of "running the show."
3. Leaders want to volunteer at well-organized agencies that have capable administration and sound governance. They do not want to be thrust into the fix-it role.
4. Leaders are attracted to agencies that handle change well. They have dealt with significant organizational issues and challenges during their careers and want to avoid high stress situations in retirement.
5. Leaders are concerned about over-commitment. They need to be encouraged to consider a wide range of options at their own pace.
6. Retiree leaders are drawn to short-term volunteer projects where they can work with a group of their peers and forge new relationships. They are also drawn to volunteer positions that offer them a new challenge outside of their present skill set.

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## Conclusions

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This manual is timely as many retired or soon to be retired leaders, nonprofit organizations, and communities are searching for new opportunities to achieve their full potential. Faced with increasing demands and diminishing resources, the nonprofit and charitable sector has a pressing need to move beyond its traditional volunteer management approaches so that it can successfully recruit and retain new groups of volunteers.

In the next few years, an increasing number of boomer leaders will be making the transition from highly demanding careers into retirement. These individuals are better educated, healthier, more active, and have a longer life expectancy than retired people in the past. They have the potential to contribute valuable skills and expertise to nonprofit and charitable organizations. But they have a wide range of options when they are thinking about retirement, in addition to volunteering. As they move into retirement, they will establish new patterns for the next phase of their lives. Most want to give back to the community, meet new people, and continue to learn. Most will strive for balance and purpose in their lives. It will be up to the nonprofit and charitable sector to convince retired leaders that volunteering is one way to fulfill many of their late-life aspirations.

At the same time, society as a whole is beginning to challenge traditional assumptions about retirement and to examine what constitutes successful aging. Initiatives that allow highly experienced, respected senior leaders to remain productive members of society will benefit the whole community. One focus group participant commented:

*“The potential at this table [of retiree leaders in our study] is phenomenal. This has reaffirmed my commitment to volunteer work. I hope the voluntary sector listens and takes what is offered to heart.”*

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## Notes

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