# CAAT Job Evaluation System for Non-Bargaining Unit Employees

# **Ontario Colleges of Applied Arts and Technology**

The Job Fact Sheet Questionnaire(JFS) is used to gather information for job evaluation purposes for the Colleges' Administrative Staff, Part-Time Support Staff, Part-Time and Sessional Academic Staff positions. Please read each section carefully before completing.

The Education and Experience sections are to be completed by the College according to the College's recruitment standards.

Upon completion by an incumbent, the JFS is reviewed and, when necessary, adjusted by the position's Manager and the Senior Manager responsible for the position. Any changes to the JFS are to be reviewed with the incumbent prior to evaluation. The JFS is then submitted to the appropriate College official for job evaluation purposes.

The JFS is not finalized until it has gone through the job evaluation process and the results have been confirmed by the College. A copy of the finalized JFS will be provided the incumbent for information purposes and as a job description.

POSITION IDENTIFICATION	DATE: April 13 <sup>th</sup> , 2021
College:	St. Lawrence College
Incumbent:	Vacant
Position Title: Position #:	Associate Director, Development
Classification: NOC Code:	Pay band 11
Division/Department:	Alumni and Development
Location/Campus:	Kingston (Tri-Campus responsibilities)
Immediate Supervisor (title):	Elizabeth Gorman, Director, Development and Alumni Relations
Type of Position:	
□ □ Administrative	☐ ☐ Part-Time Administrative
☐☐☐Sessional Academic	☐☐☐Part-Time Academic
☐☐☐Part-Time Support	☐ ☐ Other
I have read and understood the	e contents of the Job Fact Sheet (if completed by an incumbent):
Incumbent:	Date:
Recommended by	
Position's Manager:	Date:
Approved by	
Senior Manager:	Date:

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### **POSITION SUMMARY**

Provide a concise description of the position by identifying its most significant responsibilities and/or accountabilities.

The Associate Director, Development will play a leading role in St. Lawrence College's fundraising strategy and delivery, with oversight and responsibility for the planning and management of College-wide fundraising activities that engage donors in support of the College's priorities.

The incumbent will work with the Director to lead a deliberate and evidence-based fundraising program to drive stronger engagement and philanthropy from donors with sustainable year-over-year growth in philanthropic support and a focus on strong pipeline management. The development program includes major giving, planned giving, annual and alumni giving, and faculty and staff giving, with the development of specific fundraising campaigns, when needed. The Associate Director will act as a champion for philanthropy at the College and advise on trends and best practices in fundraising.

The Associate Director is also responsible for developing and maintaining a portfolio of major gift prospects and donors, with a focus on effective relationship management through the cultivation, solicitation, recognition, and stewardship of the College's supporters. In addition to the relationship management of philanthropic donors, the incumbent will also play a leading role in the emerging strategic industry partnership strategy at the College, with a particular view to how these partnerships can lead to philanthropic support. Acting as a key spokesperson of the College to donors and industry partners, the incumbent will use strong interpersonal, communication, analytical and organizational skills to motivate volunteers and engage donors to support the College's priorities.

The incumbent will be a skilled and experienced fundraiser and relationship manager, as well as a strategic thinker who can move ideas to action and identify and implement the appropriate processes and policies to support the efficient and effective delivery of fundraising programs.

### **KEY DUTIES**

Provide a description of the position's key duties. Estimate the percentage of time spent on each duty (to the nearest 5%). Add an extra page if necessary.

KEY DUTIES <u>% OF</u> TIME

### 1. Program Leadership

(25%)

- Plans and drives a progressive and sustainable fundraising program to support the College's priorities and needs with a focus on advancing the College's strategic plan, mission and vision.
- Determines annual and multi-year strategies, using a data-informed approach, including plans for securing financial support, with goals, objectives, detailed strategies to secure major and campaign gifts.
- Plans and positions special fundraising campaigns around key projects that can encompass a combination of major gifts and special fundraising activities with alumni, friends and members of the college community.

- Works with the Manager, Advancement Services to develop, implement and monitor metrics and analytics for fundraising at the College, including annual targets, dashboards, and scorecards. Prepares reports and analyses to share progress against goals.
- Works with the Director and the Manager, Advancement Services on the management of the donor pipeline, including prospect identification, qualification, cultivation and solicitation activities.
- Develops and maintains Advancement policies and standard operating procedures, ensuring Canada Revenue Agency compliance.

## 2. Donor Cultivation, Solicitation, and Stewardship

(50%)

- Develops and grows a portfolio of donor prospects. Develops opportunities to cultivate and solicit philanthropic support for St. Lawrence College. Determines donor interests and alignment with College priorities. Negotiates formal gift agreements and encourages optimal goodwill based on donor needs.
- Ensures donors are thanked, appropriately recognized and stewarded to encourage ongoing interest in St. Lawrence College.
- Develops and implements individualized stewardship plans for major donors, including the development of an annual stewardship report for all major donors.
- Creates funding proposals, plans, cases for support, and reports.
- Communicates regularly with a broad range of constituencies to strengthen connections, leverage existing relationships and engage potential donors.
   Responds to specific donor requests and ensures confidentiality in all matters related to College donors.
- Coordinates major gift announcements, working with Communications and other departments within the College, as required.
- Ensures the Raiser's Edge database is regularly updated as it relates to all major donor relationships.
- Maintains familiarity with Canada Revenue Agency guidelines pertaining to charitable giving and understands the implications.
- Subscribes to the Association of Fundraising Professionals' Donor Bill of Rights and Code of Ethical Fundraising.

## 3. Strategic Industry Partnership Development

(25%)

- Works with Senior Vice President (Strategy, Communications and Advancement), Academic Deans and Associate Deans, and Director on identifying, cultivating and managing effective and mutually beneficial partnerships that raise the profile of the College in the community and empower our graduates.
- Works with key stakeholders, internally and externally, to help advance the College's strategic priorities by identifying opportunities to collaborate and enhance the student learning environment through action learning, placement, applied research, workforce development and philanthropy.
- Develops the framework for the management of these relationships, including appropriate data management (through Raiser's Edge or other), strategic metrics to analyse the program and its impact on the College, and the resources needed to support academic partners in this work.

TOTAL: 100%

### 1. **COMPLEXITY - JUDGEMENT (DECISION MAKING)**

Complexity refers to the variety and relative difficulty of comprehending and critically analyzing the material, information, situations and/or processes upon which decisions are based.

Judgement refers to the process of identifying and reviewing the available options involved in decision making and then choosing the most appropriate option. Judgement involves the application of the knowledge and experience expected of an individual performing the position.

Provide up to three examples of the most important and difficult decisions that an incumbent is typically required to make.

- Major gift management and strategy: Develop a personalized major gift engagement a) strategy for each assigned prospect to maximize the relationship and financial commitment to the College. Each prospect and donor's unique relationship with the College is assessed and requires a tailored approach. Based on the research (financial capacity; past and current relationship with the College; etc.) a strategy and action plan is developed to maximize the potential contribution to the College. The knowledge and experience on when to ask, how much (\$20K to \$1M+), and for what, with a strong understanding of the longterm financial value of that prospect or donor, is essential. The engagement strategies are adjusted frequently depending on the complexity of the relationship. Meet the expectations of donors without contravening the College's policies and reputation. If an engagement strategy is poorly implemented, the reputation of the College is at stake and there is a potential loss of revenue.
- b) Allocation of time and resources to ensure that the fundraising program is focusing on the approved strategic initiatives that have the highest rate of return. With the significant number of internal and external partners, friends, alumni and donors, it will be essential to put in place processes and tools to evaluate the various opportunities for revenue generation. This includes developing and implementing metrics and an effective pipeline and prospect management system.
- c) Assessment of potential strategic industry partners, the potential return on investment for the partnership, the reputational and strategic risks and opportunities for the partnership.

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# 2. EDUCATION (to be completed by the College)

Education refers to the **minimum level** of formal education and/or the type of training or its equivalent that is required of an incumbent at the **point of hire** for the position. This may or may not match an incumbent's actual education or training.

The College is to identify the minimum level of education and/or type of training or its equivalent that is required for the position based upon the College's recruitment standards.

Non-Post Secondary	
□□Partial Secondary School	☐☐Secondary School Completion
Post Secondary	
□□1-Year Certificate	□□4-Year Degree
□□2-Year Diploma	☐ ☐ Masters Degree
⊠□3-Year Diploma/Degree	□□Post Graduate Degree
_	
□□Professional Designation	Specify:
□□Other	Specify:

A) Specify and describe any program speciality, certification or professional designation necessary to fulfil the requirements of the position.

Three year diploma/degree in a relevant field such as Marketing, Communications, Public Relations, or programs that focus on Fundraising, Development and/or Advancement or relevant experience. CFRE designation an asset.

- B) Specify and describe any special skills or type of training necessary to fulfil the requirements of the position (e.g., computer software, client service skills, conflict resolution, operating equipment).
  - Significant experience in a similar role, including major gifts and campaigns, and ideally in the post-secondary environment.
  - Advanced oral and written communication skills with the ability to inspire, influence and engage key stakeholders.
  - Excellent relationship building skills with exceptional networking, listening and negotiating skills.
  - Strong analytical and planning skills, and a focus on efficiencies and outcomes including knowledge of prospect and fundraising metrics.
  - Effective organizational and time management skills ability to prioritize high volume workload, handle multiple task assignments/responsibilities and meet critical deadlines.
  - Proficient with computer applications (MS Office Suite) and fundraising software (Raiser's Edge).

# 3. EXPERIENCE (to be completed by the College)

Experience refers to the amount of **related**, **progressive** work experience required to obtain the essential techniques, skills and abilities necessary to fulfil the requirements of the job at the **point of hire** into the position. This may or may not match the incumbent's actual amount of experience.

The College is to identify the minimum amount and type of experience appropriate for the position based upon the College's recruitment requirements.

# Experience required at the point of hire. Up to and including:

no experience required	□□ 4 years
3 months	□□ 5 years
6 months	⊠□ 7 years
1 year	□□ 9 years
18 months	□□ 11 years
2 years	□□13years
3 years	□□ 15 years
	□□ 17 years

Specify and describe any specialized type of work experience necessary to fulfill the requirements of the position.

The incumbent will be a skilled and experienced fundraiser and relationship manager, as well as a strategic thinker who can move ideas to action and identify and implement the appropriate processes and policies to support the efficient and effective delivery of fundraising programs.

#### INITIATIVE - INDEPENDENCE OF ACTION 4.

Initiative - Independence of action refers to the amount of responsibility inherent in a position and the degree of freedom that an incumbent has to initiate or take action to complete the requirements of the position. An incumbent is required to foresee activities and decisions to be made, then take the appropriate action(s) to ensure successful outcomes. This factor recognizes the established levels of authority which may restrict the incumbent's ability to initiate or take action, e.g., obtaining direction or approval from a supervisor, reliance on established procedures/methods of operation or professional practices/standards, and/or built-in-controls dictated by computer/ management systems.

- A) Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform using their initiative without first having to obtain direction or approval from a supervisor.
  - Develop donor relationship management strategies and activities and negotiate gift a) agreements, adhering to the College's policies and all applicable legislation.
  - Prepare donor materials for senior approval including gift agreements, proposals, cases for b) support, naming agreements, with the scope of approved priorities and adhering to policies and procedures.
  - Evaluate fundraising opportunities as they arise to assess the financial potential, the rate of C) return, and how the opportunity aligns with the College approved fundraising priorities.
  - Respond to and provide guidance for donor enquiries, concerns or complaints. d)
- B) Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform which required the direction or approval from a supervisor.
  - Setting annual and multi-year strategies such as plans for securing financial support, goals a) and objectives, determining of detailed strategies to secure major and campaign gifts.
  - Approval for special donor or gift agreements beyond the scope of normal practice. b)
  - Unbudgeted expenditures. c)
  - Relationship management issues with a donor or strategic industry partner. d)

Give specific examples of guidelines, procedures, manuals (formal or informal), computer systems/programs that are used in performing job duties and in making decisions, e.g., Government regulations, professional or trade standards, College policies or procedures, department or program procedures, computerized/manual programs/systems and any other defined methods or procedures.

Government legislation and regulations governing charitable giving, ethical standards, etc.

- Federal, Provincial and International privacy legislation.
- Fundraising industry policy and best practices.
- College policies, procedures.
- College Strategic Plan, Strategic Mandate Agreement, Academic Plan, Global Engagement Plan and other institutional documents.

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#### 5. POTENTIAL IMPACT OF DECISIONS

Potential Impact of Decisions recognizes the potential consequences that errors in judgement made by an incumbent, despite due care, could have on the College. Usually, the higher the level of accountability inherent in a position, the greater the potential consequences there are on the College from errors in judgement.

Give up to three examples of the typical types of errors in judgement that an incumbent could make in performing the requirements of the position. Do not describe errors which could occur as a result of poor performance, or ones that are rare or extreme. Indicate the probable effects of those errors on the College, e.g., loss of reputation of program/College, waste of resources, financial losses, injury, property damage, affects on staff, students, clients or public.

- Failure to act in a professional manner and appropriately cultivate and maintain a) relationships with donors could result in loss of financial support for the College and have a negative impact on the College's reputation and image in the community.
- b) Failure to follow appropriate CRA or privacy regulations could cause legal action, financial loss to the College, and loss of reputation.
- c) Making promises to donors or prospects that cannot be fulfilled could result in significant conflict and embarrassment for the College.
- d) Errors in preparing terms of reference for scholarships and bursaries could result in incorrect dollar amounts being distributed, loss of awards, and unfulfilled donor expectations.

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# 6. CONTACTS AND WORKING RELATIONSHIPS

Contacts and Working Relationships refers to the **types**, **importance** and **intended outcomes** of the contacts and working relationships required by an incumbent to perform the responsibilities of a position. It also measures the skill level required to be effective in dealing with contacts and being involved in working relationships. This factor does **not** focus on the level of the contact, but on the **nature** of the contact.

Indicate by job title, with whom an incumbent is required to interact to perform the duties and responsibilities of the positions. Describe the nature, purpose and frequency of the interaction, e.g., exchanging information, teaching, conflict resolution, team consultation, counselling.

Contacts	Contacts by Job Title	Nature and Purpose of Contact		Frequency of Contact		
Internal to the College:			Occasional	Frequent		
Internal to the college, e.g. students, staff, senior management, colleagues.	Director (Direct Supervisor)	Works closely on the overall strategy and plans, metrics for the fundraising program, and collaborates on principal and major gift strategies.		Х		
	Deans and Directors, Executive Team/Senior Leadership	Close working relationships to identify, develop, approve and implement successful fundraising initiatives and strategic industry partnerships; consult, train and involve in principal, major gift, alumni giving and industry partner strategies; involve in prospecting, cultivation, solicitation and stewardship donor activities and are spokespersons or project/program experts; and, engage their faculty and staff in Advancement and industry partnership activities.	X			
	Manager, Advancement Services	Close working relationship to ensure database, coding and processes are in place to effectively manage the fundraising program and its different streams; consult on donor relations strategies and activities and prospect identification and development of major gift pipeline and tracking, coordinate analysis/analytics required to help inform the development of future fundraising strategies.		Х		
	Senior Development Officer	Close working relationship to develop and implement donor strategies, manage pipline and prospect management activities, develop stewardship strategies, and analyze and report on program data.		х		

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Contacts	Contacts by Job Title	Nature and Purpose of Contact	Frequency of Contact		
	Other members of Alumni and Development team	Collaborate on and support cross- department initiatives including alumni engagement and activities, departmental reporting, stakeholder engagement in Advancement and the College, and organizational effectivess.		Х	
	Others at College including Risk/Contracts/Policy, Facilities, Marketing, Communications and others	A variety of interactions connected with effective fundraising including policy and legal review, donor recognition and naming opportunities, promotional opportunities, and more.	Х		
		1	Occasional	Frequent	
External to the College:					
External to the college, e.g. suppliers, advisory committees, staff at other colleges,	Alumni, donors, community leaders	Prospective and current donors who will be cultivated, solicitated and stewarded for their support to the College; engage as fundraising volunteers.		х	
government, public/private sector.	Other Colleges	Collaborating; best practices; information sharing, etc.	Х		
Occasional (O) Frequent (F)		in a while over a period of time. tedly and often over a period of time.		I	

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# 7a. CHARACTER OF SUPERVISION/FUNCTIONAL GUIDANCE

**Character of Supervision** identifies the **degree and type** of supervisory responsibility in a position or the nature of functional/program supervision, technical direction or advice involved in staff relationships.

( $$ ) Check the applicable box(es) to describe the type of supervisory responsibility required by an incumbent in the position:
$\square$ Not responsible for supervising or providing guidance to anyone.
☐☐Provides technical and/or functional guidance to staff and/or students.
$\square$ Instructs students and supervises various learning environments.
☐☐Assigns and checks work of others doing similar work.
⊠□Supervises a work group. Assigns work to be done, methods to be used, and is responsible for the work performed by the group.
$\square$ Manages the staff and operations of a program area/department.*
$\square$ $\square$ Manages the staff and operations of a division/major department.*
$\square$ $\square$ Manages the staff and operations of several divisions/major departments.*
☑□Acts as a consultant to College management.
<ul><li>□ Other e.g., counselling, coaching. Please specify:</li><li>■ Coaching and directing fundraising volunteers</li></ul>
* Includes management responsibilities for hiring, assignment of duties and work to be performed, performance management, and recommending the termination of staff.
Specify staff (by title) or groups who are supervised/given functional guidance by an incumbent.
<ul> <li>Functional guidance provided to all Development colleagues and academic partners for philanthropy and strategic industry partnerships</li> </ul>

#### 7b. SPAN OF CONTROL

Span of Control is complementary to Character of Supervision/Functional Guidance. Span of Control refers to the total number of staff for which the position has supervisory responsibility, (i.e., subordinates, plus all staff reporting to these subordinates).

Enter the total number of full time and full time equivalent staff reporting through to the position. Also identify the number of staff for whom the position has indirect responsibility (contract for service), if applicable.

Type of Staff	Number of Staff
Full-Time Staff	0
Non Full Time Staff (FTE) *	0
Contract for Service **	0
Total:	0

<sup>\*</sup> Full Time Equivalency (FTE) conversions for non full time staff are as follows:

### Academic Staff

Identify the total average annual teaching hours taught by all non full time teachers (part-time, partial load and sessional) for which the position is accountable and divide by 648 hours for post secondary teachers and 760 hours for non-post secondary teachers.

# Support Staff

Identify the total average annual hours worked by part-time support staff for which the position is accountable and divide by 1820 hours.

### Administrative Staff

Identify the total average annual hours worked by non full time administrative staff for which the position is accountable and divide by 1820 hours.

### \*\* Contract for Services

When considering "contracts for services," review the nature of the contractual arrangements to determine the degree of "supervisory" responsibility the position has for contract employees. This could range from "no credit for supervising staff" when the contracting company takes full responsibility for all staffing issues to "prorated credit for supervising staff" when the position is required to handle the initial step(s) when contract staffing issues arise.

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### 8. PHYSICAL AND SENSORY DEMANDS

Physical/Sensory Demands considers the degree and severity of exertion associated with the position. The factor considers the intensity and severity of the physical effort rather than the strength or energy needed to perform the task. It also considers the sensory attention required by the job as well as the frequency of that effort and the length of time spent on tasks that cause sensory fatigue.

Identify the types of physical and/or sensory demands that are required by an incumbent. Indicate the frequency of the physical demands as well as the frequency and duration of the sensory demands. Use the frequency and duration definitions following the tables to assist with the descriptions.

### PHYSICAL DEMANDS

Describe the types of activities and provide examples that demonstrate the physical effort that is required in the position on a regular basis, i.e., sitting, standing, walking, climbing, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period of time.

Types of Activities that Demonstrate Physical	Frequency (note definitions below)					
Effort Required	Occasional	Moderate	Considerable	Extended	Continuous	
Sitting at computer station for data entry, preparing project plans, writing reports, preparing marketing materials, etc.			Х			
Normal computerized office environment – standing, walking, bending to retrieve files, using office equipment, etc.				Х		
Standing for events, presentations, donor activities.	Х					
Driving to and from external events and campuses	Х					

### **SENSORY DEMANDS**

Describe the types of activities and provide examples that demonstrate the sensory effort that is required in the position on a concentrated basis, i.e., reading information/data without interruption, inputting data, report writing, operating a computer or calculator, fine electrical or mechanical work, taking minutes of meetings, counselling, tasting, smelling etc.

	Frequency (note definitions below)					Duration
Types of Activities that Demonstrate Sensory Effort Required	Occasional	Moderate	Considerable	Extended	Continuous	Short Intermediate or Long
Analysis and research activities, Maintaining/updating /evaluating data			Х			L
Creating marketing materials		Х				S
Preparing reports, proposals, presentations			Х			I
Interacting with people – internat and external – listening and speaking			Х			I

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# FREQUENCY:

Occasional:	Occurs once in a while, sporadically.	
Moderate:	Occurs on a regular, ongoing basis for up to a quarter of the work period.	
Considerable:	iderable: Occurs on a regular, ongoing basis for up to a half of the work period.	
Extended:	Occurs on a regular, ongoing basis for up to three-quarters of the work period.	
Continuous:	Occurs on a regular, ongoing basis throughout the entire work period except for regulated breaks.	

# **DURATION:**

Short: Up to one hour at a time without the opportunity to change to another task or take a brea			
Intermediate: More than one hour and up to two hours at a time without the opportunity to change to another task or take a break.			
Long:	More than two hours at a time without the opportunity to change to another task or take a break.		

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#### 9. WORKING CONDITIONS

Working Conditions considers the frequency and type of exposure to undesirable, disagreeable environmental conditions or hazards, under which the work is performed.

Describe any unpleasant environmental conditions and work hazards that the incumbent is exposed to during the performance of the job.

### **Environment**

Describe the types of activities and provide examples that demonstrate exposure to unpleasant environmental conditions in the day-to-day activities that are required in the job on a regular basis, e.g., exposure to dirt, chemical substances, grease, extreme temperatures, odours, noise, travel, verbal abuse, body fluid, etc. Indicate the activity as well as the frequency of exposure to undesirable working conditions.

Note on Travel: St. Lawrence College has adopted the following guidelines for travel. From the list below, please indicate which category best describes the travel required for the position.

- 1. Local travel on a regular basis up to 2 times per week. Out-of-town travel on a regular basis 1-2 times per month.
- 2. Local travel on a regular basis more than 2 times per week. Out-of-town travel 2 – 8 times per month.
- 3. Out-of-town travel on a regular basis more than 8 times per month.

Types of Activities That Involve Job Related	Frequency (note definitions below)			
Unpleasant Environmental Conditions. Include travel requirements (if any).	Occasional	Frequent	Continuous	
Local travel on a regular basis up to 2 times per week.  Out-of-town travel on a regular basis 1 – 2 times per month.	Х			
Attending alumni and donor events and meetings in a variety of settings	variety X			

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## **Hazards**

Describe the types of activities and provide examples that demonstrate the hazards in the dayto-day activities that are required in the job on a regular basis, e.g. chemical substance, electrical shocks, acids, noise, exposure to infectious disease, violence, body fluids, etc. Indicate the activity as well as the frequency of exposure to hazards.

Types of Activities That Involve Job Related Hazards	Frequency (note definitions below)		
	Occasional	Frequent	Continuous
n/a			

# Frequency:

Occasional	Occurs once in a while, sporadically.	
Frequent	Occurs regularly throughout the work period.	
Continuous	Occurs regularly, on an ongoing basis, throughout most of the work period.	

# **Additional Notes Pertaining to this Position:**

Please save form in the following format: "Position Title – Department – Incumbent".

Please note formatting errors will be corrected if necessary.

To cursor from one entry point to the next please use the arrow keys or Tab.

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