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# American Jewish Philanthropy:

## Overview of Research between 2000 and 2020

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# Abstract

This article provides an overview of research on American Jewish philanthropy since 2000. We describe how this field is being studied and call attention to gaps in existing scholarship. The review sheds light on an important philanthropic community and reveals the difficulty of defining American Jewish philanthropy and studying its giving patterns. We show that several areas of Jewish philanthropy remain understudied, including the scope and trends of giving, changes in organized Jewish giving, generational succession sustaining Jewish philanthropy, and the growing importance of donor-advised funds. The review provides an up-to-date collection of sources beneficial to scholars who research nonprofit organizations and philanthropy and are interested in studying Jewish philanthropy and suggests several paths for future research.

Keywords: Jewish philanthropy; giving to Israel; identity and giving; generational giving; donor-advised funds.

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# Introduction

This article provides an overview of scholarship on American Jewish philanthropy, identifying the main areas of study, as well as gaps in research. The review sheds light on an important philanthropic community and suggests paths for future research. We show that the high number of publications about American Jewish philanthropy in the past two decades yielded a diverse set of themes and methodologies, but did not produce a comprehensive and holistic body of knowledge about Jewish giving. We find that there is a gap between the number of publications and the need to establish consistent scholarship about Jewish philanthropy, with a strong foundation in the theory and analytical frameworks of philanthropic studies.

For the purpose of this overview, we used a broad definition of Jewish philanthropy that focuses on the funders' perspective rather than that of the recipients. This includes all Jewish funders rather than only those contributing to Jewish causes. We included those who identify as Jewish, have a Jewish background, or have connections to the Jewish community (Shaul Bar Nissim and Brookner, 2019).

Tobin et al. (2003) noted that Jews are "remarkably generous givers to the general society" (p. 1). American Jewish giving is estimated between \$6 and \$9 billion annually (Shaul Bar Nissim, 2018b; Wertheimer, 2018), and the majority of Jewish mega-donations go to non-Jewish causes (94%), including health, arts, and educational institutions (Tobin et al., 2003; Tobin and Weinberg, 2007), with larger organizations receiving a greater share of Jewish mega-donations. The average Jewish household donates \$2,526 to charity annually, far more than their Protestant (\$1,749) and Catholic (\$1,142) counterparts (Giving USA, 2017). Moreover, 76% of Jewish households gave to charity in 2012, compared to 63% of Americans of other religious affiliations or those not religious (Connected to Give, 2014).

Jewish philanthropy is rooted in notions of giving by and to local communities. The philanthropic activity of the Jewish community combines both institutional and informal as well as religious and secular forms of giving by private foundations, Jewish federations, group-specific entities like women's funds, giving circles, and self-help agencies. In the 20th century, Jewish giving was organized through communal philanthropy, becoming critical to political and communal solidarity (Kornfeld, 2015).

The key role played by Jewish donors in American philanthropy derives from a combination of religious, cultural, and normative reasons that have evolved over time. According to Broyde (2010), the Biblical obligation to give to charity and the criteria for giving have changed as the American Jewish community has evolved over the course of the 20th century, alongside growth in the responsibilities taken on by the American government (Broyde, 2010). Today, many observant Jews embrace a concept known as the "eight degrees" of charitable giving, articulated by Maimonides, using the metaphor of an eight-rung ladder that donors can ascend to reach closer to Heaven. Jews of various denominations have embraced other frameworks, such as Woocher's (1986) Jewish Civil Religion, which is expressed mainly through philanthropic activity, or contemporary interpretations of concepts like *tikkun olam* ("repairing the world"), *chesed* ("kindness or grace"), and *tzedakah* ("charity").

These frameworks guided our preliminary search, which used keywords such as "Jewish philanthropy," "Jewish giving," "Jewish charity," *tzedakah*, *trumah* ("donation"), *tzedek* ("justice"), "chesed," "tikun olam," "Israel," and a set of Hebrew words relating to philanthropy and charity.<sup>1</sup> Resources were collected from a variety of repositories, including the Berman Jewish Policy Archive, JSTOR, Scholarworks, and Google Scholar.

Several search criteria guided the search for publications included in this review. First, we included academic and semi-academic articles and books published after 2000, originating at universities, think tanks, and other research organizations. Essays, editorials, and white papers on the issue

<sup>1</sup> In Hebrew: צדקה, תרומה, תיקון עולם, חסד, עזר, ישראל, קרנו, מתן, מעשר.

were not included in this analysis. The year 2000 was chosen as the cutoff date to restrict the study to recent research based on the broad changes that took place in the Jewish community in the past two decades. First, focusing our review on the past two decades brings into focus recent datasets reflecting the prioritization of research on Jewish philanthropy by the scholarly community. Second, the review focused narrowly on the concept of Jewish philanthropy, leaving outside the scope of this inquiry broader works relating to questions of Jewish belonging, affiliation, and identification. Third, the reviewed literature contains primarily English language works and some Hebrew publications. Fourth, because Jewish philanthropy is part of broader research on faith-based giving, the review includes studies that explore religion and philanthropy more generally. The final mix of sources included 19 peer-reviewed articles, 11 reports, 8 books, 6 edited books, and 3 doctoral dissertations.

Each publication was read and reread to determine research methodologies and thematic focus. Following a thorough review of the publications, we identified and defined key themes, methodologies, research gaps, and areas of unique scientific contribution to the study of Jewish philanthropy. Overall, we identified six key themes, suggesting that there is a consensus in the research community about the core issues in Jewish philanthropy that deserve exploration in Jewish philanthropy: the historical origins of American Jewish philanthropy, identity and giving, generational trends in Jewish philanthropy, changes in the structure of American Jewish philanthropy, donor-advised funds, and American Jewish philanthropy for Israel.

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# The Historical Origins of American Jewish Philanthropy

Several historical papers have been published in the last two decades about American Jewish philanthropy. The majority of studies focused on the development of the Jewish communal system, centralized fundraising efforts, and local and international activities of Jewish organizations. Kelner (2013) examined the nature of federated giving, arguing that the federations play a state-like role, promoting common principles of governance. The expansion from religious motivations to assimilation and integration is discussed in Hammack's (2020) work about the establishment of the Jewish community and its institutions in Cleveland. He identifies a shift from religious philanthropy to philanthropy embracing both religious and communal causes. He found that although synagogues were the main target for Jewish giving until the mid-20th century, before the Second World War Jewish communal institutions began to draw on local philanthropy for funding social and welfare services, internally focused and community-centric (Corwin-Berman, 2017). These services were provided by social and welfare agencies whose reliance increased over time on government funding (Soloway, 2010). More research is required to establish what changes these agencies, operating under Jewish auspices, have experienced in the funding they receive from Jewish donors because of their tenuous connection to the needs of Jewish communities.

At the turn of the 20th century, Jewish Federations became a prominent philanthropic organization for raising and distributing funds collected from North American Jews. Brilliant and Young (2004) traced the organizational identities of communal philanthropies, focusing, among others, on the Jewish Federations. They argued that Jewish federations behave as fiscal intermediaries, relying on local donations with a strong national structure. They "embrace a concept of community that includes Jews, locally and elsewhere, as well as non-Jewish neighbors in their local communities"

(Brilliant and Young 2004, p. 34). Fiscal crises and rapid membership expansion often required mergers of Jewish federations. Berkman (2017) showed that during the Great Depression, federations used such institutional survival strategies as “buffering mechanisms,” including permanent endowments and the coordination of services across agencies to maximize efficiency.

After WWII, Jewish federations became aware of the potential of “financialization,” defined by Corwin-Berman as “the state’s deregulation of finance and its partnership with private entities in matters related to public policy” (p. 1460). The philanthropic efforts of the Jewish community changed dramatically to fund and provide services and resources to all communities.

Brilliant and Young (2004) suggested that in the mid-1960s, the primary function of the federations was that of a community problem-solver, with secondary roles of fiscal intermediary, economic regulator, and charitable mutual fund. They attributed the stability of Jewish federations to the stability of organizational identity. Berkman (2017) found that in the 1970s, the Jewish Federation of New York transitioned from “a politics of assimilation to a politics of ethnic survival” (p. 146). Changing societal circumstances and the suburban migration of the Jewish population stimulated the political mobilization of the Federation. “Fiscal imperatives” drove the changes in the Federation of New York over time.

In her work on the same Federation, Shaul Bar Nissim (2019b) found a change in religious practices in response to challenges confronting the American Jewish community, namely, high rates of intermarriage, a diminishing sense of belonging to the community, and significant diversification of religious expression. After 1990, the gradual integration of ethnoreligious practices with the missions and distribution of resources of the Federation reshaped the faith-based orientation of the Federation. This, in turn, reflects the impact of the crisis of Jewish continuity toward generational succession within Jewish communal institutions, which merits further research.

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# Identity and Giving

Several studies on Jewish giving have focused on identity factors in the Jewish community that align with certain giving patterns. These studies addressed correlations between giving patterns and religious and ethnic identity, as well as intersectional identities, such as age and gender. The underlying religious moral considerations behind Jewish giving were explored by Broyde (2010), who described the tension between the ideal of charity and the reality of scarce resources.

Broyde examined the debate in Jewish religious commentary between the vision of *tzedakah* as giving to the poor vs. giving to institutions in the Jewish community. The contemporary value of *tzedakah*, together with other values, are discussed by Ukeles (2010), who explored the philanthropic behavior of Orthodox Jewish households, suggesting that a set of Jewish values, such as *tikkun olam*, provides the ethical basis for their giving: "They respond to a vision of shared humanity, Tzelem Elokim (image of God), by giving Tzedakah to non-Jewish causes. They respond to the ideal of Klal Yisrael (all Jewish people are responsible for each other) (p.3)." Ukeles found that a higher percentage of Orthodox Jews than of unaffiliated Jews (14% vs. 7%) give to charity, and that 60% of Orthodox Jews give to non-Jewish causes.

A range of sociological, demographic, and economic studies focused on characteristics and personal attributes associated with giving to Jewish causes, including age, generation, income, marital status, synagogue membership, observance, religious affiliation, and social ties (Waxman, 2010a; Mesch et al. 2010). More recent national and local studies of the Jewish community also explored individual giving to Jewish causes (Aronson et al., 2019; Lugo et al., 2013). Dashefsky and Lazerwitz (2009) analyzed the National Jewish Population Surveys of 1971, 1990, and 2000-2001 to examine the philanthropic giving behaviors of Jewish families, indicating that Jewish families were more likely to donate money than to volunteer. They found that Jewish women were more involved in volunteering than Jewish men, and

that increasing age was associated with higher donations to Jewish causes. Socioeconomic variables, such as family income, Jewish denomination, and synagogue membership were found to have a moderately positive effect on giving to Jewish causes. Generational variables affected giving to non-Jewish causes, with higher levels of giving by those belonging to multi-generational American families. Ukeles (2010) found opposite trends in the age variable among younger Orthodox, who were more likely to give to Jewish causes.

The *Giving USA* report on religious giving for 2017 contained results from the Philanthropy Panel Study (PPS), which addressed questions regarding charitable giving by over 9,000 households (*Giving USA*, 2017). The data show that Jewish households give more than those of other religious backgrounds, although not significantly more after controlling for income. Rooney (2010) conducted a comparative assessment of the scope of giving by Jewish and by other faith communities, showing that 88% of Jews gave a portion of their income to charity, with an annual average of \$3,822. Only the members of the Latter Day Saints made a higher contribution. Jewish donors gave the second lowest percentage (41%) of total giving to religious causes. Rooney concluded that Jews are more likely to give to religious causes than are donors of other faiths, even when controlling for secular giving by Jewish communities.

The *Connected to Give* series of studies (2014) provides a national analysis of American Jewish giving. Based on a survey of Jewish and non-Jewish households, it reported a strong correlation between engagement with Jewish institutions, religious affiliation, and levels of philanthropic giving to all causes. Seventy-six percent of American Jews gave charitably to both Jewish and non-Jewish causes, with the younger generations giving less frequently to Jewish organizations. Jews gave at the highest rate to secular organizations (56%) and at the lowest rate to congregations (37%). As much as 39% of amounts donated by Jews went to non-Jewish causes, and 23% of Jews had a planned charitable bequest, significantly higher than that of the non-Jews sampled in the survey. The series focused on the expectations that Jewish donors have of their grantees. It found that religiously-engaged donors were more likely to support Jewish organizations without consideration of the effect of their programs. Donors with lower income and higher religious affiliation preferred to donate to organizations that were perceived as trustworthy rather than to those that had a demonstrated impact.

Several historical essays addressed the philanthropy of Jewish women (Brasher, 2010; Kelfer, 2021; Kirshenblatt-Gimlet, 2006; Nadell, 2019). Chambré's (2001) work traced the role of American Jewish women's organizations in the 19th and 20th centuries, highlighting the invisible toil of women performing unpaid work for the benefit of the community. Many similarities existed between Jewish and non-Jewish women's organizations, such as a focus on children, migrants, and gender-based groups. But the urgency surrounding Jewish survival, the commitment to both volunteering and donating, and religious norms and traditions made Jewish women's philanthropy distinctive. Mesch et al. (2010) explored sex differences in giving using data from the PPS to identify differences between different groups of Jews, Jewish households, mixed households, and non-Jewish households. They found that Jewish women married to non-Jews gave much less frequently than did other groups in their study.

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# Generational Trends in Jewish Giving

The study of inter-generational trends has expanded in the past two decades (see: Bekkers, 2007; Einoff, 2017; Wilhelm et al., 2008; Quaranta and Dotti-Sani, 2016; Rooney et al., 2018), but few studies focused on the transmission of philanthropic behaviors and values of Jewish donors from one generation to the next. In a study of the Jewish community in Phoenix, Arizona, Waxman (2010a) found that more families have been giving to non-Jewish causes over time. This finding is especially true for Jews under the age of 35, who were most likely to give to non-Jewish causes but also least likely to give overall. Waxman showed that the decline in giving to Jewish communal philanthropies was similar to that in giving to public charities like the United Way.

Waxman identified this trend as a generational change in the depth of Jewish identity and charitable responsibility, which may affect both the incentives for Jews to donate to Jewish and Israeli causes, and the community-building effects of receiving Jewish charity (Waxman, 2010a). The generational decline in religious and ethnic homogeneity of North American Jewish communities resulted in a dynamic self-definition by individual Jews, as they moved beyond traditional demarcations (Cohen and Kelman, 2007; Sarna, 2004).

Wertheimer (2018) reported a continuing increase in amounts donated to communal philanthropies by wealthy individuals, and discussed the trends in generational giving, pointing at the growing proportion of millennials who use such new tools as impact investing. Brookner (2020) suggested the importance of experiential philanthropy education programs for Jewish adolescents, which socializes them to charitable giving to Jewish causes and organizations. He concluded that developing a Jewish donor identity in adolescence serves as a justification for prosocial behavior.

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# Changes in the Structure of American Jewish Philanthropy

The contemporary American Jewish philanthropic system consists of organizations of various types engaged in funding, fundraising, or both. Shaul Bar Nissim and Brookner (2019) presented a typology of private family, corporate, and supporting foundations that often play the dual roles of raising and allocating funds; secular and faith-based organizations that provide services or engage in advocacy; friends, umbrella, and pass-through organizations; and community foundations that are sponsors of donor-advised funds.

Recent decades have blurred the boundaries between Jewish organizations of different types, and these organizations are assuming new roles. Many fill overlapping functions, as foundations have taken on an increasing role in operating programs, and federations fund nonprofits while also developing internal programs. This has resulted in a decentralized system that reflects the new reality: increasing numbers of gifts, grants, community initiatives and internal initiatives.

Lindsay and Wuthnow (2010) highlighted the changing incentives of federations, foundations, and other re-granting institutions in the late 1900s and early 2000s. They noted that the increasing secularization of American society and increased focus on religious pluralism posed new challenges to federated and other faith-based giving. Tobin (2001) documented the ways in which the integration of Jews in America has led to a unique form of Americanized Jewish philanthropy, where values such as volunteering and personal choice influenced American Jews and were among the reasons for the decline of supporting organizations and for the increased reliance on private foundations. Additional reasons were increased integration of Jews into the broader American society, an ideology of serving the world rather than exclusively the Jewish community, and shared responsibility to contribute to American society.

Kornfeld's (2015) analysis of the New Orleans Jewish community in the post-Katrina period suggests that Jewish philanthropic organizations have become a mechanism for donors to express opinions about debates within the Jewish community. As a result of income inequality, Jewish philanthropic organizations have become increasingly representative of the wealthier segment in the Jewish community, rather than of the Jewish community more broadly. Similarly, Corwin-Berman (2020) presented the complex relationships between philanthropy, democracy, and capitalism within Jewish communal organizations, showing how the American Jewish philanthropic community tied Jewish institutions to the American state and its inequalities in resource distribution.

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# Donor-advised Funds (DAFs)

Corwin-Berman (2017) argues that the development of DAFs in Jewish philanthropy attests to the establishment of endowments for charitable purposes and the growing influence of private donors over charitable expenditures by organizations. The author showed that historically, advocates such as the Jewish lawyer, Norman Sugarman, transformed Jewish organizations and philanthropies by interpreting tax law to provide greater freedom to accumulate private capital in the name of the public good.

Shaul Bar Nissim and Brookner (2019) explored the growing importance of DAFs in Jewish philanthropy. They presented data collected for DAFs hosted by Jewish organizations, showing that giving totaled nearly \$3.5 billion during the period of 2000-2015. These few studies represent the gap in our knowledge about the role played by DAFs in the world of Jewish philanthropy, their share in donations made by Jewish donors and organizations, and their overall effect on the Jewish giving.

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# American Jewish Philanthropy for Israel

Recent studies of Jewish giving to Israel have investigated the nature of philanthropy and the central role of American Jewish fundraising organizations. These organizations serve as intermediaries in the aggregation of donations from Jewish sources and Jewish communities, and as an important source of ideological and material support of Israel (Fleisch, 2014; Kabalo, 2009; Waxman, 2010b). They focused on key organizations, such as the JAFI, the JDC, the UJA, and the United Palestine Appeal (UPA).

For example, in an analysis of organized giving in the 1940s, Lainer-Vos (2014) assessed the creation of the UJA as a catalyst for identification and a sense of belonging to the State of Israel. He described the role of the UJA in creation of collective identity through engagement practices and philanthropy, developing a meaningful concept of a Jewish nation for donors by simultaneously and bringing together different groups in the Jewish community. The notion of collective identity was also described by Waxman (2010a), who noted that Jewish giving to Israel by the Federation served as a proxy for Jewish collective identity. For example, the 1967 Six-Day War between Israel and its Arab neighbors had an astonishing effect on American Jewish giving to Israel: over \$180 million was raised within several weeks.

Only a few studies have measured the change in the scope of philanthropic giving to Israel, or analyzed the shifts in philanthropic practices toward Israel. Shaul Bar Nissim (2019b) found that new philanthropic practices contributed to the creation of a new Jewish Diaspora philanthropy characterized by new missions, goals, and activities in Israel, pointing to a shift in the extent of donor engagement in decision making. Fleisch and Sasson (2012) assessed the transfer of funds to Israel and argued that the nature of American tax law regarding donations to overseas organizations has resulted in a

distinct development of unique types of Jewish fundraising organizations: federations, "friends of" organizations, pass-through organizations that function similarly to "friends of" organizations but do not necessarily partner with a particular agency abroad, and umbrella funds that fundraise for a certain ideological cause in Israel. They also found that between 1994 and 2007, giving to Israel nearly doubled, from one billion to two billion dollars. More recently, Shaul Bar Nissim (2018b) identified a drop in the percentage of funds supporting organizations in Israel, from 14% in 2000 to 9% in 2015.

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# American Jewish Philanthropy: Overview and Future Research

Research on American Jewish philanthropy has focused on several issues: identity and giving, intergenerational giving, historical explorations, structural changes, new mechanisms for giving, and philanthropy for Israel. These studies complement each other. Although they differ in their methodologies and focal points, they provide an important but partial understanding of American Jewish philanthropy. Most of them derive from the discipline of Jewish studies, and only a few studies borrow theories and frameworks from philanthropic studies. Therefore, Jewish philanthropy remains a field understudied by scholars of philanthropy and nonprofits. Our review suggests that existing publications provide a plethora of outlooks for studying American Jewish giving while lacking a basis in the foundations of philanthropic studies. This reveals a need to establish a comprehensive body of knowledge about this field of study.

We also showed that several areas of Jewish philanthropy remain understudied, as discussed below, providing research opportunities for scholars of philanthropy and nonprofit studies to test the applicability of existing theories and research models for the study of Jewish philanthropy. In particular, future research can proceed by utilizing the four following strategies:

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# **1 Capture changes in giving during the lifecycle of Jewish individuals, changes across generations, and the motivations of Jewish millennials' and Gen Z giving.**

Most notably, future studies can conduct an exploration of changes in giving by Jewish households over time, with a robust panel study across a significant number of Jewish households. They can also explore questions unique to Jewish behavior and identity, including intermarriage, affiliation and engagement in community institutions, and giving to Jewish and secular causes, including those in Israel. In addition, they can study the unique philanthropic trends and approaches of high-net-worth Jewish donors.

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# **2 Explore changes in mechanisms and conduits of giving, structural motivations, and barriers.**

These can include new forms of giving, changes to tax policies, and the exponential growth of Jewish giving through DAFs.

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# **3 Evaluate the effect of innovation in Jewish grant-making intended for Jewish continuity and for sustaining Jewish philanthropy.**

This can include the study of generational succession in the Jewish community.

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## **Study the contemporary effect of American Jewish philanthropy on Israeli state and society, including the reciprocal relationships between American Jewish philanthropy and Israeli philanthropy.**

In addition to the above research gaps, the study of Jewish philanthropy is characterized by unique challenges. One of the significant needs in the study of Jewish philanthropy is the exploration and mapping of its definitions. David Hammack (2020) argued that "'Jewish philanthropy' is not a subject for definitive history. No single definition of Jewish will satisfy every reader. No single definition of philanthropy is universally accepted" (p.35). Thus, studying Jewish philanthropy poses a twofold challenge. Any researcher attempting to study American Jewish philanthropy must choose either the funder or the recipient perspective, address who is a Jewish funder, and what are Jewish causes and Jewish organizations based on religious and ethnic identification, background, or connections to the Jewish community (Shaul Bar Nissim and Brookner, 2019). There are multiple definitions of Jewish organizations, Jewish giving, and Jewish causes, leading to challenges in identifying grant-making organizations as Jewish and establishing criteria for their inclusion or exclusion from the study population. Formulating a comprehensive and acceptable definition of Jewish philanthropy is one of the significant challenges for future research.

The multiple methodological approaches used by the scholarship explored in this article yielded a rich and diverse collection of research. At the same time, scholars brought to light the challenge of validating research, recreating and comparing the findings, and providing a common reference point across units of analysis. Methodological issues and barriers include the lack of comprehensive data on the national and international structures of Jewish giving and the different forms and channels of contributions. The lack of publicly available information on religious Jewish organizations hampers the ability to present the comprehensive scope of Jewish philanthropy, and the information tends to be incomplete.

The complex structure of American Jewish philanthropy presents a challenge to the tracking of granting and re-granting activities. Thousands of intermediary and conduit organizations must be tracked to map the paths of Jewish charitable gifts. Thus, there is a debate of what constitutes Jewish philanthropy. Finally, this critical review suggests that charitable activities of sub-groups of the Jewish community are difficult to track. It may be challenging to include in future research Haredi groups that have developed specialized philanthropic systems, or the giving patterns of Sephardic Jews and Israeli Jews. Thus, the literature is limited in its understanding of the undocumented patterns of giving, which makes future research on these groups difficult but valuable.

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