



Ford Foundation records, Office of the Vice President of Administration, Office Files of Arthur D. Trottenberg

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English

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Summary Information

| | |
|----------------------------------|---|
| Repository: | Rockefeller Archive Center |
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| Title: | Ford Foundation records, Office of the Vice President of Administration, Office Files of Arthur D. Trottenberg |
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| Abstract: | <p>The office files of Arthur D. Trottenberg document the varied responsibilities Trottenberg fulfilled in his role as Vice President of Administration for the Ford Foundation from 1968 to 1979. The files were transferred to the Foundation's Archives in increments spanning the years 1969-1991, and they were formally accessioned all together in 2004. Series have been reworked, but Trottenberg's original filing order (primarily chronological) has been retained. Budget reports and some papers from the Board of Trustees, including the Board's Executive Committee and its Finance Committee, were removed from the collection. These documents are noted in Appendices C and D, and can be found in their respective collections in the Archives. Information on specific program-related investments, as noted in Appendix E, has also been removed from the collection and can be located in the Closed Grant File Room. The Foundation used the services of a number of legal consultants. Written reports from some of these consultants can be found within the collection. However, a number of legal consultants were only evidenced within the collection by the bills they sent to the Foundation, which have been removed from the collection. For a full list of legal consultants, see Appendix F. Access to folders 454-458 in box 46 is restricted; the researcher should consult the archivist before viewing the materials in these folders. The position of Vice President of Administration in the 1970s differed from its present-day counterpart in that it encompassed a wider variety of responsibilities. The former position included the present-day's responsibilities – facilities, information services, purchasing – as well as overseeing the work of the Comptroller's Office, Manpower Services (human resources), and Program-Related Investments. Thus, Trottenberg's files provide the researcher with a broad view of the Foundation's activities during his tenure.</p> |

Preferred Citation

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Biographical / Historical

Arthur D. Trottenberg was Vice President of Administration for the Ford Foundation from July 1968 until his retirement in November 1979.

Trottenberg was born December 30, 1917. After serving as a Captain for the United States Air Force (1942-1946), he received his A.B. degree in 1948 from Harvard University. Upon graduating, Trottenberg remained at Harvard until 1968, filling the following positions:

- Manager, Operating Services • Assistant to Vice President • Vice President, Radcliffe College • Assistant Dean, Faculty of Arts and Sciences

In 1979, Trottenberg retired from the Foundation to accept an appointment as the Associate Dean of the faculty of Arts and Sciences at Harvard University.

Throughout his career, Trottenberg was a consultant to the United States Office of Education, as well as to a number of colleges, universities, and foundations. He also served as the director and secretary of the Salzburg Seminar in American Studies until his position at the Foundation required him to resign from those posts in 1968.

Trottenberg authored a number of publications including, *A Vision of Paris-Atget and Proust* (Macmillan 1963) and various articles on education, architecture, planning, and photography for several journals and magazines.

Arthur D. Trottenberg died in Cambridge, MA on June 20, 2003.

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Scope and Contents

The office files of Arthur D. Trottenberg consist of 32 linear feet (64 archival boxes, plus one flat box) of primarily memoranda, correspondence, reports, and policy papers. Policy papers refer to both

drafts of policy statements and pages from policy manuals. Other materials found in the collection include telegrams, speeches/statements, press releases, newspaper articles, audits and financial reviews, questionnaires, charts, handwritten notes, photographs, maps, and blueprints. The records document Trottenberg's tenure as the Vice President of Administration at the Ford Foundation, 1968-1979. The files include a limited number of records from before Trottenberg's term with the Foundation. These earlier documents are mostly records passed on to Trottenberg from his predecessor, Verne S. Atwater.

The files cover a wide range of topics that is reflective of Trottenberg's various responsibilities as the Vice President of Administration of the Foundation. Trottenberg oversaw a number of departments – Comptroller's Office, Manpower Services (name changed to Office of Personnel Services in 1973), Logistical Services, and Program-Related Investments – causing his files to serve as a useful cross-section of the Foundation's activities in the 1970s.

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Arrangement

The office files of Arthur D. Trottenberg are arranged into 11 series:

Series I: ADMINISTRATION AND OPERATIONS (1964-1980, bulk 1968-1979) Series II: MEMORANDA AND CORRESPONDENCE (1968-1979) Series III: FINANCIAL (1958-1980, bulk 1970-1975) Series IV: PERSONNEL (1958-1980, bulk 1968-1978) Series V: INFORMATION SYSTEMS AND SERVICES (1967-1983, bulk 1967-1977) Series VI: OVERSEAS (1966-1979, bulk 1968-1977) Series VII: PROGRAM ACTIVITY (1958-1979, bulk 1968-1977) Series VIII: SELF STUDY (1955-1979, bulk 1968-1973) Series IX: SUBJECT FILES (1949-1979, bulk 1968-1977) Series X: REAL ESTATE (1966-1979, bulk 1967-1976) Series XI: BOARD OF TRUSTEES (1962-1979, bulk 1967-1978)

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Administrative Information

Publication Statement

Rockefeller Archive Center

15 Dayton Avenue

Sleepy Hollow 10591

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URL: <http://www.rockarch.org>

Conditions Governing Access

Material more than ten years old is open for scholarly research.

Select individual files are restricted, as noted. Permission to access these files must be obtained from the Ford Foundation before scholarly access is permitted.

Conditions Governing Use

Completion of a use agreement is required prior to providing scholarly access. See RAC Head of Reference (or applicable designee) for details. Ford Foundation holds title, copyright and literary rights in the collection, in so far as it holds them. The Rockefeller Archive Center has authority to grant permission to cite and publish material from the collection for scholarly purposes. Permission to publish extensive excerpts, or material in its entirety, will be referred to the Ford Foundation.

Immediate Source of Acquisition

Ford Foundation archive was deposited at RAC in 2011. Ford Foundation records, correspondence, reports, program files and officers papers were transferred to, and accessioned by, RAC beginning in 2011. Accessions continue as necessary.

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Controlled Access Headings

- Ford Foundation

Physical Characteristics and Technical Requirements

Materials requiring specialized equipment for access (film, audio, video, slides) may be restricted from scholarly research dependent on availability of the applicable equipment.

Brittle or damaged items, or materials otherwise in need of preservation care, may be restricted from scholarly research at the discretion of the RAC Head of Archival Services/RAC Head of Reference.

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Collection Inventory

Administration and Operations, 1964-1980 (bulk)

Scope and Contents

The series consists mainly of memoranda, but also includes correspondence, telegrams, reports, policy papers, speeches/statements, press releases, and newspaper articles.

Arrangement

Series I, Administration and Operations, is housed in ten archival boxes, and is divided into two subseries: Administration and Operations. "Operations" refers to the Foundation's program areas. Within these subseries, the files are arranged hierarchically by division and office. Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Administration and Operations The Administration and Operations series contains materials from the Foundation's divisions, offices, and staff members. The series consists of various types of material such as reports and policy papers. However, the primary material found in this series is memoranda between Trottenberg and the staff members, demonstrating Trottenberg's role within various areas of the Foundation's work. The series is most abundant in Trottenberg's interaction with McGeorge Bundy, Roger Kennedy, and Howard Dressner, as well as the Office of the Comptroller, and Program-Related Investments. While not as profuse, the series also contains some documentation of the work of others, such as a few folders dedicated to the Division of Education and Research and its program officers. The series covers a wide range of topics spanning the Foundation's activities. Some of the most prominent topics include affirmative action, management costs, tax reporting, program-related investments, grant payments, review of program priorities, self-evaluation and task forces, record-keeping and records management, and benefit plans. This series is best used in conjunction with other series.

Administration

| Title/Description | Instances | |
|---|-----------|----------|
| Office of the President - Bundy, McGeorge, 1968-1969 | box 1 | folder 1 |
| Office of the President - Bundy, McGeorge, 1970 | box 1 | folder 2 |
| Office of the President - Bundy, McGeorge, 1971 | box 1 | folder 3 |
| Office of the President - Bundy, McGeorge, 1972 | box 1 | folder 4 |
| Office of the President - Bundy, McGeorge, 1973 | box 1 | folder 5 |
| Office of the President - Bundy, McGeorge, 1974 January-June | box 1 | folder 6 |
| Office of the President - Bundy, McGeorge, 1974 July-December | box 1 | folder 7 |
| Office of the President - Bundy, McGeorge, 1975 January-October | box 2 | folder 8 |
| Office of the President - Bundy, McGeorge, 1975 December | box 2 | folder 9 |

| | | |
|--|-------|-----------|
| Office of the President - Bundy, McGeorge, 1976 | box 2 | folder 10 |
| Office of the President - Bundy, McGeorge, 1977-1979 | box 2 | folder 11 |
| Office of the President - Smith, Theodore, 1974-1975 | box 2 | folder 12 |
| Office of the President - Cuninggim, Merrimon, 1973-1974 | box 2 | folder 13 |
| Office of the President - Cuninggim, Merrimon, 1975 | box 2 | folder 14 |
| Office of the President - Towers, Perrin, Forster and Crosby, Inc., 1972 | box 2 | folder 15 |
| Division of Administration, 1964-1966 | box 3 | folder 16 |
| Division of Administration, 1967-1980 | box 3 | folder 17 |
| Division of Administration - Atwater, Verne, 1964-1968 | box 3 | folder 18 |
| Division of Administration - Mayer, Robert, 1968-1973 | box 3 | folder 19 |
| Division of Administration - Comptroller, general, 1966-1968 | box 3 | folder 20 |
| Division of Administration - Comptroller, general, 1969 | box 3 | folder 21 |
| Division of Administration - Comptroller, general, 1970 January-June | box 3 | folder 22 |
| Division of Administration - Comptroller, general, 1970 July- December | box 3 | folder 23 |
| Division of Administration - Comptroller, general, 1971 January-June | box 4 | folder 24 |
| Division of Administration - Comptroller, general, 1971 July- December | box 4 | folder 25 |
| Division of Administration - Comptroller, general, 1972 | box 4 | folder 26 |
| Division of Administration - Comptroller, general, 1973 | box 2 | folder 27 |
| Division of Administration - Comptroller, general, 1974 | box 4 | folder 28 |
| Division of Administration - Comptroller, general, 1975 | box 4 | folder 29 |
| Division of Administration - Comptroller, general, 1976-1977 | box 4 | folder 30 |
| Division of Administration - Comptroller, withholding federal income tax, 1969-1971 | box 4 | folder 31 |
| Division of Administration - Comptroller, withholding federal income tax, 1972-1976 | box 5 | folder 32 |
| Division of Administration - Comptroller, taxes, 1970 | box 5 | folder 33 |
| Division of Administration - Comptroller, taxes, 1971 January- May | box 5 | folder 34 |
| Division of Administration - Comptroller, taxes, 1971 June- December | box 5 | folder 35 |
| Division of Administration - Comptroller, taxes, 1973 | box 5 | folder 36 |

| | | |
|---|-------|-----------|
| Division of Administration - Comptroller, taxes, 1974-1975 | box 5 | folder 37 |
| Division of Administration - Comptroller, taxes, 1976-1979 | box 5 | folder 38 |
| Division of Administration - Comptroller, reports, 1968 | box 5 | folder 39 |
| Division of Administration - Logistical Services, 1967-1970 | box 5 | folder 40 |
| Division of Administration - Purchasing Services, FY 1968 | box 5 | folder 41 |
| Division of Administration - Building Services, 1967-1969 | box 5 | folder 42 |
| Division of Administration - Building Services, use of facilities, 1968-1972 | box 5 | folder 43 |
| Division of Administration - Building Services, recycling, 1971-1975 | box 5 | folder 44 |
| Division of Administration - Program-Related Investments, 1968 | box 6 | folder 45 |
| Division of Administration - Program-Related Investments, 1969 | box 6 | folder 46 |
| Division of Administration - Program-Related Investments, 1970 | box 6 | folder 47 |
| Division of Administration - Program-Related Investments, 1971 January-June | box 6 | folder 48 |
| Division of Administration - Program-Related Investments, 1971 July-December | box 6 | folder 49 |
| Division of Administration - Program-Related Investments, 1972-1973 | box 6 | folder 50 |
| Division of Administration - Chafkin, Sol, 1972-1973 | box 6 | folder 51 |
| Division of Administration - Kelly, Eamon, 1973-1976 | box 6 | folder 52 |
| Office of the Secretary – Dressner, Howard, 1968-1971 | box 7 | folder 53 |
| Office of the Secretary – Dressner, Howard, 1972 | box 7 | folder 54 |
| Office of the Secretary – Dressner, Howard, 1973-1974 | box 7 | folder 55 |
| Office of the Secretary - Office of General Counsel – Dressner, Howard, 1971-1974 | box 7 | folder 56 |
| Office of the Secretary - Office of General Counsel – Dressner, Howard, 1975-1976 | box 7 | folder 57 |
| Office of the Secretary - Legal Services, 1969-1973 | box 7 | folder 58 |
| Vice President for Finance - Kennedy, Roger, 1970 | box 7 | folder 59 |
| Vice President for Finance - Kennedy, Roger, 1971 | box 7 | folder 60 |
| Vice President for Finance - Kennedy, Roger, 1972-1973 | box 7 | folder 61 |
| Vice President for Finance - Kennedy, Roger, 1974 January-June | box 8 | folder 62 |

| | | |
|--|-------|-----------|
| Vice President for Finance - Kennedy, Roger, 1974 September-December | box 8 | folder 63 |
| Vice President for Finance - Kennedy, Roger, 1975-1976 | box 8 | folder 64 |
| Vice President for Finance - Ellis, Reed, 1968-1969 | box 8 | folder 65 |
| Vice President for Finance - Treasurer, 1971-1975 | box 8 | folder 66 |
| Vice President for Finance - Lenagh, Thomas, 1969-1972 | box 8 | folder 67 |
| Office of Reports - Office of Reports, 1968-1971 | box 8 | folder 68 |
| Office of Reports - Office of Reports, 1972-1973 | box 8 | folder 69 |
| Office of Reports - Office of Reports, 1974-1977 | box 8 | folder 70 |
| Office of Reports - Annual Report, 1968 | box 9 | folder 71 |
| Office of Reports - Annual Report, 1969 | box 9 | folder 72 |

Operations

| Title/Description | Instances | |
|--|-----------|-----------|
| Division of Humanities and Arts - Lowry, W. McNeil, 1968-1976 | box 9 | folder 73 |
| Division of Education and Research, 1968-1976 | box 9 | folder 74 |
| Division of Education and Research - Ward, F. Champion, 1967-1972 | box 9 | folder 75 |
| Division of Education and Research - Howe, Harold, 1971-1973 | box 9 | folder 76 |
| Division of Education and Research - Cheit, Earl, 1973 | box 9 | folder 77 |
| Division of Education and Research - Ellis, Reed, 1968-1969 | box 9 | folder 78 |
| Office of Public Broadcasting - Friendly, Fred W. and David Davis, 1970-1973 | box 9 | folder 79 |
| Division of National Affairs - Sviridoff, Mitchell, 1967-1971 | box 10 | folder 80 |
| Division of National Affairs - Sviridoff, Mitchell, 1972-1977 | box 10 | folder 81 |
| Division of National Affairs - Robinson, Marshall, 1973-1979 | box 10 | folder 82 |
| Division of International Affairs, 1969-1971 | box 10 | folder 83 |
| Division of International Affairs, 1972-1973 | box 10 | folder 84 |

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Memoranda and Correspondence, 1968-1979

Scope and Contents

The Memoranda subseries includes Trottenberg's chronological files and other assorted staff memoranda (mostly sent from Trottenberg to the staff, though there are some memoranda that were sent from other staff member to Trottenberg). The Correspondence subseries includes miscellaneous correspondence with people outside of the Foundation. Some correspondence deals with grant proposals. The series consists of primarily memoranda and correspondence, but also includes some telegrams, policy papers, and reports.

Arrangement

Series II, Memoranda and Correspondence, is housed in seven archival boxes, and is divided into two subseries: Memoranda and Correspondence.

Scope and Contents

Memoranda and Correspondence The Memoranda and Correspondence series provides a rough outline of Trottenberg's influence during his post at the Foundation. Even more so than the previous series, the documents in this series touch on topics that span all of the other series in this collection, such as affirmative action, computer usage, library services, access to Foundation records, travel policy, salary policy, medical plan, energy conservation, fellowships, grant payment procedures, leasing office space, and real estate inquiries. Since the topics tend to be mixed together, the files in this series may not be the most useful on their own. They may be better used in conjunction with the other series as a way of filling in holes in the data.

Memoranda

| Title/Description | Instances | |
|--|-----------|------------|
| Staff Memos, 1973 January-August | box 10 | folder 85 |
| Staff Memos, 1973 September-December | box 10 | folder 86 |
| Staff Memos, 1974 January-May | box 10 | folder 87 |
| Staff Memos, 1974 June-December | box 10 | folder 88 |
| Staff Memos, 1975 January-June | box 11 | folder 89 |
| Staff Memos, 1975 July-December | box 11 | folder 90 |
| Staff Memos, 1976 | box 11 | folder 91 |
| Staff Memos, 1977 | box 11 | folder 92 |
| Staff Memos, 1978 | box 11 | folder 93 |
| Chronological Files, 1968 January-June | box 11 | folder 94 |
| Chronological Files, 1968 July-December | box 11 | folder 95 |
| Chronological Files, 1969 January-June | box 11 | folder 96 |
| Chronological Files, 1969 July-December | box 11 | folder 97 |
| Chronological Files, 1970 January-August | box 12 | folder 98 |
| Chronological Files, 1970 September-December | box 12 | folder 99 |
| Chronological Files, 1971 January-June | box 12 | folder 100 |
| Chronological Files, 1971 July-December | | |

| | | |
|---|--------|------------|
| | box 12 | folder 101 |
| Chronological Files, 1972 January-June | box 12 | folder 102 |
| Chronological Files, 1972 July-December | box 12 | folder 103 |
| Chronological Files, 1973 January-June | box 12 | folder 104 |
| Chronological Files, 1973 July-December | box 12 | folder 105 |
| Chronological Files, 1974 January-June | box 12 | folder 106 |
| Chronological Files, 1974 July-December | box 12 | folder 107 |
| Chronological Files, 1975 | box 13 | folder 108 |
| Chronological Files, 1976 | box 13 | folder 109 |
| Chronological Files, 1977 | box 13 | folder 110 |
| Chronological Files, 1978 | box 13 | folder 111 |
| Chronological Files, 1979 | box 13 | folder 112 |

Correspondence

Arrangement

Items within each folder are mostly arranged chronologically, maintaining original order. However, Trottenberg kept some of his correspondence files in alphabetical order based on the correspondent's last name. Original order has been maintained in these files as well.

| Title/Description | Instances | |
|--------------------------------------|-----------|------------|
| Correspondence, general, 1970-1979 | box 13 | folder 113 |
| Correspondence, proposals, 1971-1972 | box 13 | folder 114 |
| Correspondence, proposals, 1974-1975 | box 13 | folder 115 |
| Alphabetical Files, A-H, 1968-1969 | box 14 | folder 116 |
| Alphabetical Files, K-R, 1968-1969 | box 14 | folder 117 |
| Alphabetical Files, S-Z, 1968-1969 | box 14 | folder 118 |
| Alphabetical Files, A-L, 1970-1971 | box 14 | folder 119 |
| Alphabetical Files, Ma-Me, 1970-1971 | box 14 | folder 120 |
| Alphabetical Files, Mi-Y, 1970-1971 | box 14 | folder 121 |
| Alphabetical Files, A-F, 1972-1973 | box 15 | folder 122 |
| Alphabetical Files, G-M, 1972-1973 | box 15 | folder 123 |
| Alphabetical Files, N-Z, 1972-1973 | box 15 | folder 124 |
| Alphabetical Files, A-J, 1974 | box 15 | folder 125 |
| Alphabetical Files, K-Z, 1974 | box 15 | folder 126 |
| Alphabetical Files, B-J, 1975 | | |

| | | |
|------------------------------------|--------|------------|
| | box 15 | folder 127 |
| Alphabetical Files, K-W, 1975 | box 15 | folder 128 |
| Alphabetical Files, A-B, 1976-1979 | box 16 | folder 129 |
| Alphabetical Files, D-O, 1976-1979 | box 16 | folder 130 |
| Alphabetical Files, P-W, 1976-1979 | box 16 | folder 131 |

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Financial, 1958-1980 (bulk)

Scope and Contents

The General subseries consists of documents on a number of topics, such as accounting, management cost actions, and financial reports. The Budget subseries contains budget materials ranging from general management costs to costs of particular offices. The Budget subseries documents budget planning only. The series consists of memoranda, correspondence, reports, charts, and notes.

Arrangement

Series III, Financial, is housed in seven archival boxes, and is divided into two subseries: General and Budget. Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Financial The Financial series contains various materials, such as a number of financial reports, both internal and outsourced to consultants. Other topics include, accounting procedures, balance of payments, the General Reserve, and management costs. However, the series is most complete in its documentation of budget planning. Trottenberg was a large presence in the process of forming the annual budgets for all of the Foundation's divisions and offices. His role in budget planning is particularly notable in the early half of the 1970s when the Foundation underwent a period of major retrenchment which will be discussed in more depth later.

General

| Title/Description | Instances | |
|------------------------------------|-----------|------------|
| Accounting, recentralization, 1971 | box 16 | folder 132 |
| Accounting, instruction, 1976 | box 16 | folder 133 |
| Cash Flow, 1970-1977 | box 16 | folder 134 |
| Balance of Payments, 1965-1969 | box 16 | folder 135 |
| General Reserves, 1972-1978 | box 16 | folder 136 |
| Management Costs, 1968 | box 16 | folder 137 |
| Management Costs, projection, 1971 | box 16 | folder 138 |
| Management Cost Actions, 1971-1972 | box 16 | folder 139 |
| Management Cost Actions, 1973-1975 | box 16 | folder 140 |

| | | |
|---|--------|------------|
| Management Cost Actions, 1976-1978 | box 17 | folder 141 |
| Future Management Options, 1977-1978 | box 17 | folder 142 |
| Fiscal Status Report, 1968 | box 17 | folder 143 |
| Quarterly Financial Reports, 1969 | box 17 | folder 144 |
| Quarterly Financial Reports, 1970 | box 17 | folder 145 |
| Quarterly Financial Reports, 1971 | box 17 | folder 146 |
| Quarterly Financial Reports, 1972 | box 17 | folder 147 |
| Quarterly Financial Reports, 1973 | box 17 | folder 148 |
| Quarterly Financial Reports, 1974 | box 17 | folder 149 |
| Quarterly Financial Reports, 1975 | box 17 | folder 150 |
| Quarterly Financial Reports, 1976 | box 17 | folder 151 |
| Quarterly Financial Reports, 1977 | box 17 | folder 152 |
| Lucas, Tucker, and Company, 1968-1972 | box 17 | folder 153 |
| Financial Statements, Price Waterhouse & Co., 1958-1960 | box 17 | folder 154 |
| Financial Statements, Price Waterhouse & Co., 1961-1963 | box 17 | folder 155 |
| Financial Statements, Price Waterhouse & Co., 1964-1966 | box 17 | folder 156 |
| Financial Statements, Price Waterhouse & Co., 1967-1969 | box 17 | folder 157 |
| Financial Statements, Price Waterhouse & Co., 1970-1972 | box 18 | folder 158 |
| Financial Statements, Price Waterhouse & Co., 1973-1974 | box 18 | folder 159 |
| Financial Statements, Price Waterhouse & Co., 1975-1976 | box 18 | folder 160 |
| Financial Statements, Price Waterhouse & Co., 1977-1978 | box 18 | folder 161 |
| Financial Statements, Price Waterhouse & Co., 1979-1980 | box 18 | folder 162 |

Budget

Separated Materials:

Separated Materials

All final reports have been removed from the collection and can be found in the Budget Records (see Appendix C).

| Title/Description | Instances | |
|--|-----------|------------|
| Budget, general - FY 1970, 1968 November - 1969 December | box 18 | folder 163 |
| Budget, general - FY 1971, 1970 | box 18 | folder 164 |
| Budget, general - FY 1972, 1970 October - 1972 December | box 18 | folder 165 |
| Budget, general - FY 1973, 1972 January - 1973 February | box 18 | folder 166 |

| | | |
|---|--------|------------|
| Budget, general - FY 1974-1975, 1972 January - February | box 19 | folder 167 |
| Budget, general - FY 1974-1975, 1972 February - 1974 April | box 19 | folder 168 |
| Management Budget - FY 1970, 1968 June - 1969 September | box 19 | folder 169 |
| Management Budget - FY 1970, 1969 December - 1970 December | box 19 | folder 170 |
| Management Budget - FY 1974-1975, 1973 May - September | box 19 | folder 171 |
| Management Budget - FY 1974-1975, 1974 February - 1975 December | box 19 | folder 172 |
| Management Budget - FY 1976-1977, 1975 January - 1977 December | box 19 | folder 173 |
| General Management Costs - FY 1969, 1968 January - July | box 19 | folder 174 |
| General Management Costs - FY 1969, 1968 July - December | box 20 | folder 175 |
| General Management Costs - FY 1971, 1970 February - November | box 20 | folder 176 |
| General Management Costs - FY 1972, 1971 February - 1973 January | box 20 | folder 177 |
| General Management Costs - FY 1973, 1972 February - 1973 October | box 20 | folder 178 |
| General Management Costs - FY 1974, 1972 November - 1974 August | box 20 | folder 179 |
| Division of Administration - FY 1970, 1970 August | box 20 | folder 180 |
| Division of Administration - FY 1972, 1971 April, 1972 April | box 20 | folder 181 |
| Division of Administration - FY 1973, 1972 March - November | box 20 | folder 182 |
| Comptroller - FY 1969-1970, 1968 November - 1969 September | box 20 | folder 183 |
| Comptroller - FY 1971, 1970 July - August | box 20 | folder 184 |
| Manpower Services - FY 1969, 1968 November - 1969 April | box 20 | folder 185 |
| Manpower Services - FY 1971-1972, 1971 April - 1973 January | box 20 | folder 186 |
| Manpower Services - FY 1973, 1972 March - May | box 20 | folder 187 |
| Logistical Services - FY 1970-1971, 1968 June - 1970 August | box 20 | folder 188 |
| Logistical Services - FY 1973, 1972 July - August | box 20 | folder 189 |
| Program-Related Investments - FY 1970-1971, 1968 November - 1971 November | box 20 | folder 190 |
| Program-Related Investments - FY 1973, 1972 February - September | box 21 | folder 191 |
| Office of Reports - FY 1973, 1972 April 14 | box 21 | folder 192 |

| | | |
|--|--------|------------|
| Program Management Costs - FY 1971, 1969 December - 1972 March | box 21 | folder 193 |
| Program Management Costs - FY 1971, 1970 April - 1971 December | box 21 | folder 194 |
| Program Management Costs - FY 1972, 1971 February - 1973 January | box 21 | folder 195 |
| Program Management Costs - FY 1973, 1972 February - 1973 March | box 21 | folder 196 |
| Program Management Costs - FY 1974-1975, 1972 February - 1973 February | box 21 | folder 197 |
| Program Management Costs - FY 1974-1975, 1973 February - 1974 February | box 21 | folder 198 |
| Division of the Humanities and the Arts - FY 1970, 1969 April 14 | box 21 | folder 199 |
| Division of Education and Research - FY 1970, 1968 December - 1969 May | box 21 | folder 200 |
| Division of Education and Research - FY 1971-1972, 1970 April 22 | box 21 | folder 201 |
| Office of Public Broadcasting - FY 1970-1971, 1969 May - 1970 April | box 22 | folder 202 |
| Division of National Affairs - FY 1970, 1969 April - November | box 22 | folder 203 |
| Division of National Affairs - FY 1973, 1972 February | box 22 | folder 204 |
| Division of International Affairs - FY 1970, 1969 March - July | box 22 | folder 205 |
| Budget Reports, 1968-1972 | box 22 | folder 206 |

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Personnel, 1958-1980 (bulk)

Scope and Contents

The General subseries consists of documents on a number of topics, such as staff recruitment and orientation, leaves of absence, housing assistance, and travel policy. The Compensation subseries contains information on salary policy and benefits (mainly the thrift and retirement plans). The series consists of memoranda, correspondence, reports, policy papers, charts, and notes.

Arrangement

Series IV, Personnel, is housed in eight archival boxes, and is divided into two subseries: General and Compensation. Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Personnel The Personnel series covers a wide range of topics, such as the internationalization of staff, staff recruitment and orientation, leaves of absence, housing assistance, travel policy, and field office memos. However, the most abundant information that this series contains is that of compensation packages, ranging from salary policies to benefits. Whereas salary policy is primarily documented in the form of office memoranda, much of the information on benefits is in the form of consultant reports by Towers, Perrin, Forster, and Crosby (TPF&C). Establishing salary policies during the early 1970s was a difficult task due to the rapidly rising costs of living in New York combined with the Foundation's need to cut management costs during its period of severe retrenchment. During Trottenberg's time, employee benefit packages were affected by the Employment Retirement Income Security Act of 1974, which will be discussed in more depth later.

General

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| General, 1970 | box 22 | folder 209 |
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| General, 1972 January-April | box 22 | folder 211 |
| General, 1972 May-December | box 22 | folder 212 |
| General, 1973-1975 | box 22 | folder 213 |
| Field Office Memos, 1970-1972 | box 23 | folder 214 |
| Field Office Memos, 1973 | box 23 | folder 215 |
| Field Office Memos, 1976 | box 23 | folder 216 |
| Job Description Study, 1964-1974 | box 23 | folder 217 |
| Staff Recruitment, 1963-1966 | box 23 | folder 218 |
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| New Staff Orientation, 1965 | box 23 | folder 221 |
| Staff Profile, 1971-1973 | box 23 | folder 222 |
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| Delegation of Authority, 1958-1968 | box 23 | folder 225 |
| Check Cashing, 1972-1973 | box 23 | folder 226 |
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| Staff Appraisals, 1971-1977 | box 24 | folder 230 |
| Job Reclassifications and Promotions, 1964-1972 | box 24 | folder 231 |
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| Health and Medical Services, 1967-1972 | box 24 | folder 234 |
| Cost of Living, 1969-1978 | box 24 | folder 235 |
| Housing Assistance for NY Staff, 1974 | box 24 | folder 236 |
| Facility Charges, 1969-1974 | box 24 | folder 237 |
| Moving and Shipping, 1968-1977 | box 24 | folder 238 |
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| Insurances, 1973-1975 | box 24 | folder 240 |
| Insurances, 1976-1979 | box 24 | folder 241 |
| John Liner Associates, Inc., 1971 | box 25 | folder 242 |
| Travel, general, 1965-1969 | box 25 | folder 243 |
| Travel, general, 1970 January-June | box 25 | folder 244 |
| Travel, general, 1970 July-December | box 25 | folder 245 |
| Travel, general, 1971-1975 | box 25 | folder 246 |
| Travel, spouses, 1969-1970 | box 25 | folder 247 |
| Travel, spouses, 1971-1976 | box 25 | folder 248 |
| Travel, freight and allowances, 1969-1972 | box 25 | folder 249 |
| Cresap, McCormick and Paget, Inc., 1975 | box 25 | folder 250 |

Compensation

| Title/Description | Instances | |
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| Salary Policy - FY 1972, 1971 July - December | box 26 | folder 251 |
| Salary Policy - FY 1973, 1972 | box 26 | folder 252 |
| Salary Policy - FY 1974, 1973 | box 26 | folder 253 |
| Salary Policy - FY 1975, 1974 | box 26 | folder 254 |
| Salary Policy - FY 1976, 1975 June - 1976 June | box 26 | folder 255 |
| Salary Policy - FY 1977, 1976 April - September | box 26 | folder 256 |
| Salary Policy - FY 1978, 1977 March - October | box 26 | folder 257 |
| Salary Policy - FY 1979, 1978 April - November | box 26 | folder 258 |

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| Salary Policy - FY 1980, 1979 March - September | box 26 | folder 259 |
| Salary Comparisons, 1970-1976 | box 26 | folder 260 |
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| Thrift and Retirement Plan, 1969-1975 | box 26 | folder 263 |
| Webster, Sheffield, Fleischmann, Hitchcock & Brookfield, 1968 | box 27 | folder 264 |
| Rogers, Casey, & Barksdale, Inc., 1977 | box 27 | folder 265 |
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| Towers, Perrin, Forster & Crosby (TPF&C Reports), 1968 | box 27 | folder 267 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1969 February | box 27 | folder 268 |
| Towers, Perrin, Forster & Crosby (TPF&C Appendices), 1969 February | box 27 | folder 269 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1969 April | box 27 | folder 270 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1970 September | box 27 | folder 271 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1970 December | box 27 | folder 272 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1971 | box 28 | folder 273 |
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| Towers, Perrin, Forster & Crosby (TPF&C Reports), 1973 October-December | box 28 | folder 277 |
| Towers, Perrin, Forster & Crosby (TPF&C Reports), 1974 | box 28 | folder 278 |
| Towers, Perrin, Forster & Crosby (TPF&C Reports), 1975 | box 28 | folder 279 |
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| Towers, Perrin, Forster & Crosby (TPF&C Report), 1971 November | box 28 | folder 281 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1978 February | box 29 | folder 282 |
| Towers, Perrin, Forster & Crosby (TPF&C Report), 1978 September | box 29 | folder 283 |

Review of Personnel and Employee Benefit Practices for Local Staff - Towers, Perrin, Forster & Crosby (TPF&C Reports), 1970 box 65

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Information Systems and Services, 1967-1983 (bulk)

Scope and Contents

The General subseries consists of general consultant studies on the Foundation's information systems and services. The Library subseries and the Archives and Records Management subseries are fairly limited in the information on these units. The Computer and Electronic Data Processing subseries, on the other hand, is a more useful subseries as it more thoroughly documents computer usage within the Foundation, particularly in its early stages. The series consists of memoranda, correspondence, reports, policy papers, reports, and notes.

Arrangement

Series V, Information Systems and Services, is housed in four archival boxes, and is divided into four subseries: General, Library, Archives and Records Management, and Computer and Electronic Data Processing. Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Information Systems and Services The Information Systems and Services series addresses the full gamut of information areas of the Foundation. The Library subseries includes limited information about library usage, donation of books, and future development of the library and library services. The Archives and Records Management subseries contains information on record-keeping and records management in the form of correspondence control and bureaucratic reporting, as well as information on an oral history project documenting policies, program objectives, and organization of the Foundation. The subseries also documents the beginnings of the Foundation's archives, primarily in the form of establishing policies and procedures on the access of archival records. The series proves most useful in the fullness of its Computer and Electronic Data Processing subseries. Information technology is no doubt an integral part of today's workplace, but its presence was not always assumed. The Computer and Electronic Data Processing subseries documents the Foundation's early efforts at incorporating use of computer systems into the Foundation's workload in order to speed up processes that could easily be automated. Initially (as early as 1965), the Foundation looked into the prospect of using computers primarily for computer-based accounting. However, as years passed, the Foundation expanded its interest in computer usage, as with its 1974 proposal for the Grants Retrieval and Information Display System (GRIDS), providing wider-spread access of data on grants throughout the Foundation.

General

| Title/Description | Instances | |
|--|-----------|------------|
| Documentation Incorporated, part 1, 1967 March | box 29 | folder 284 |
| Documentation Incorporated, part 2, 1967 March | box 29 | folder 285 |
| Documentation Incorporated, part 3, 1967 March | box 29 | folder 286 |
| Documentation Incorporated, 1967 April | box 29 | folder 287 |
| Cresap, McCormick and Paget, 1973 | box 29 | folder 288 |

Library

| Title/Description | Instances | |
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| Library, general, 1970-1974 | box 30 | folder 290 |
| Library Committee, 1968-1969 | box 30 | folder 291 |
| Donation of Books, 1972-1974 | box 30 | folder 292 |
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Archives and Records Management

| Title/Description | Instances | |
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| Oral History, 1970-1977 | box 30 | folder 296 |
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Computer and Electronic Data Processing

| Title/Description | Instances | |
|--|-----------|------------|
| Computer, general, 1965-1967 | box 30 | folder 301 |
| Computer, general, 1968 | box 30 | folder 302 |
| Computer, general, 1969 | box 30 | folder 303 |
| Computer, general, 1970 | box 31 | folder 304 |
| Computer, general, 1971-1972 | box 31 | folder 305 |
| Computer, general, 1973 | box 31 | folder 306 |
| Computer, general, 1974 | box 31 | folder 307 |
| Computer, general, 1975 | box 31 | folder 308 |
| Computer, general, 1976-1977 | box 31 | folder 309 |
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| Automated Payroll and Personnel Information System, 1969 | box 31 | folder 314 |
| Automated Portfolio Management and Securities Accounting, 1970-1973 | box 31 | folder 315 |
| Grants Retrieval and Information Display System, 1974-1975 | box 32 | folder 316 |
| Equipment Lease, 1970-1975 | box 32 | folder 317 |
| IBM, Computer Usage Seminar, 1969 | box 32 | folder 318 |
| IBM, Equipment, 1975-1976 | box 32 | folder 319 |
| Center for Management Technology, Inc., 1975-1976 | box 32 | folder 320 |
| Center for Management Technology, Inc., 1976 | box 32 | folder 321 |

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Overseas, 1966-1979 (bulk)

Scope and Contents

The General subseries consists of documents on a number of topics, including personnel policies, compensation, and taxes for overseas offices, as well as information on specific field offices. The series consists of memoranda, telegrams, reports, policy papers, audits, newspaper articles, and notes.

Arrangement

Series VI, Overseas, is housed in four archival boxes, and is divided into four subseries: General, Staff Trips, Audits, and Conferences. Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Overseas The Overseas series covers a number of topics, ranging from compensation and taxes for overseas staff members, to information about field offices such as financial audits. The series also includes staff members' overseas trip reports. For instance, Trottenberg traveled all over the globe to such locales as, London, Paris, Latin American, Egypt, Lebanon, and Nigeria, visiting field offices and attending committee meetings. The series also documents preparation and planning for a number of conferences that were held overseas. Some such conferences include the International Division Conferences in 1973 and 1975, the Athens Press Conference in 1973, as well as conferences held in Nairobi, New Delhi, and Mexico.

General

| Title/Description | Instances | |
|--|-----------|------------|
| Overseas, general, 1969-1973 | box 32 | folder 322 |
| International Division Organization, 1970 | box 32 | folder 323 |
| Guidelines to Personnel Administration, 1966 | box 32 | folder 324 |
| Personnel Policies, 1970-1976 | box 32 | folder 325 |
| Towers, Perrin, Forster & Crosby, 1969 | box 32 | folder 326 |
| Towers, Perrin, Forster & Crosby, 1977 | | |

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|--|--------|------------|
| | box 32 | folder 327 |
| Compensation and Taxes, 1974-1976 | box 32 | folder 328 |
| Compensation and Taxes, 1977 January-August | box 33 | folder 329 |
| Compensation and Taxes, 1977 September-December | box 33 | folder 330 |
| Taxes, 1969-1974 | box 33 | folder 331 |
| Taxes, 1978-1979 | box 33 | folder 332 |
| Field Office – Athens, Greece, 1970-1972 | box 33 | folder 333 |
| Field Office – Bangkok, Thailand, 1967 | box 33 | folder 334 |
| Field Office – Lagos, Nigeria, 1969-1970 | box 33 | folder 335 |
| Field Office – Madrid, Spain, 1970-1972 | box 33 | folder 336 |
| Field Office – New Delhi, India, 1968-1975 | box 33 | folder 337 |
| Field Office – Latin America and Caribbean, 1968-1972 | box 33 | folder 338 |
| Towers, Perrin, Forster & Crosby – Middle East & Africa, 1970 | box 33 | folder 339 |
| Towers, Perrin, Forster & Crosby – Asia & Pacific, 1970 | box 34 | folder 340 |
| Towers, Perrin, Forster & Crosby – Latin America, 1970 | box 34 | folder 341 |
| Annual Reports, general - FY 1969, 1970 January - February | box 34 | folder 342 |
| Annual Reports, Middle East and Africa - FY 1968, 1969 January | box 34 | folder 343 |

Staff Trips

| Title/Description | Instances | |
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| Staff Trips, general, 1968-1970 | box 34 | folder 344 |
| Asian and Pacific Office Visits, 1969 | box 34 | folder 345 |
| ADT's Trip to Lebanon, Egypt, and Nigeria, 1968 | box 34 | folder 346 |
| ADT's Trip to Latin America, 1973 | box 34 | folder 347 |
| ADT's Trip to Paris, France and London, England, 1973 | box 34 | folder 348 |

Audits of Field Offices

| Title/Description | Instances | |
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| Stewart, Charles and John V. McDermott, 1966 | box 34 | folder 349 |
| Akmajian, Herant, 1969-1971 | box 34 | folder 350 |
| Wolf, Thomas and John P. Doran, 1971 | box 34 | folder 351 |
| Masone Jr., Nunzio, Thomas Wolf, and Leonard Spilka, 1972 | box 34 | folder 352 |
| Esola, Ronald, 1972 | box 34 | folder 353 |

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|---|--------|------------|
| Akmajian, Herant, 1972-1973 | box 34 | folder 354 |
| Wolf, Thomas, Leonard Spilka, and Ronald P. Walker, 1973-1975 | box 34 | folder 355 |
| Masone Jr., Nunzio, Ronald Esola, and Thomas Wolf, 1973-1975 | box 35 | folder 356 |

Conferences

| Title/Description | Instances | |
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| Administrative Conferences, 1968-1971 | box 35 | folder 357 |
| International Division Conference, 1973 | box 35 | folder 358 |
| International Division Conference, 1975 | box 35 | folder 359 |
| Nairobi Conference, 1969 | box 35 | folder 360 |
| Mexico Conference, 1969 | box 35 | folder 361 |
| New Delhi, India Conference, 1970 | box 35 | folder 362 |
| New Delhi Conference, 1971 | box 35 | folder 363 |
| New Delhi Conference, 1971 | box 35 | folder 364 |
| Athens Press Conference, 1973 | box 35 | folder 365 |

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Program Activity, 1958-1979 (bulk)

Separated Materials:

Separated Materials

Specific appropriations have been removed from the folders as this information can be found within the dockets in the Board of Trustees Records. Moreover, information about various PRIs has also been removed and was originally found in the Closed Grant File Room at Ford Foundation (see Appendix E).

Scope and Contents

The General subseries consists of information on planning and evaluation the Foundation's programs. The Program-Related Investments focuses on the progress of the PRI program in its first years, and the Grants subseries emphasizes Foundation policies on administering grants. The series consists of memoranda, correspondence, reports, financial reviews, and notes.

Arrangement

Series VII, Program Activity, is housed in six archival boxes, and is divided into four subseries: General, Program-Related Investments, Grants, Financial Reviews of Grantees. Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Program Activity The Program Activity series documents general policy for activities related to the Foundation's program areas. The series covers general program strategy, planning and evaluation. It also covers topics in grant administration such as, travel and study awards, payment policy, multi-year renewals, Delegated Authority Projects (DAPs), Foundation-Administered Projects (FAPs), and expenditure responsibility. The series contains some information on specific grants that the Foundation issued in the form of financial reviews of grantees. The series also documents Program-Related Investments (PRIs), a direct responsibility of Trottenberg's. Beginning in 1968, PRIs began as an experiment in realizing philanthropic goals via capital investment. The PRI subseries documents the beginnings of this experiment, covering some specific information on PRI recipients to self-evaluation of the new program. Topics in this series include the PRI Policy Committee, threshold approvals, fiscal status summaries, and investment summaries. The series also includes two information papers evaluating the PRI program two years and four years after its inception.

General

| Title/Description | Instances | |
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| Program Strategy, 1968 | box 36 | folder 366 |
| Program Planning, 1972 | box 36 | folder 367 |
| Program Evaluation, 1968 | box 36 | folder 368 |
| Monitoring Policy, 1970-1971 | box 36 | folder 369 |

Program-Related Investments

| Title/Description | Instances | |
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| Mutual Fund Meeting, 1968-1969 | box 36 | folder 371 |
| Investments, general, 1969-1973 | box 36 | folder 372 |
| Commitments, revisions, 1968-1970 | box 36 | folder 373 |
| Threshold Approvals, 1969-1971 | box 36 | folder 374 |
| Investment Summaries and Annual Reports, 1968-1970 | box 36 | folder 375 |
| Fiscal Status and Summary Reports, 1970-1972 | box 36 | folder 376 |
| Information Paper – 2 Years of PRIs, 1970 | box 36 | folder 377 |
| Information Paper – 4 Years of PRIs, 1971-1972 | box 36 | folder 378 |
| Webster, Sheffield, Fleischmann, Hitchcock & Brookfield, 1968 | box 36 | folder 379 |
| Marshall and MacDevitt, 1970 | box 36 | folder 380 |

Grants

| Title/Description | Instances | |
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| Grants to Individuals, 1969-1971 | box 37 | folder 382 |

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|---|--------|------------|
| Grants to Individuals, 1972-1974 | box 37 | folder 383 |
| Grants to Individuals, 1975-1977 | box 37 | folder 384 |
| Travel and Study Awards, 1968-1969 | box 37 | folder 385 |
| Grants to Government Employees, 1969-1977 | box 37 | folder 386 |
| Grants Processing System, 1969 | box 37 | folder 387 |
| Payment Policy and Procedures, 1970-1976 | box 38 | folder 388 |
| Overhead Charges, 1968-1970 | box 38 | folder 389 |
| Overhead Charges, 1971-1974 | box 38 | folder 390 |
| Expenditure Responsibility, 1969-1979 | box 38 | folder 391 |
| Multi-Year Renewals, 1973 | box 38 | folder 392 |
| DAPs, general, 1972-1973 | box 38 | folder 393 |
| FAPs, general, 1970-1972 | box 38 | folder 394 |
| Report and Analysis, 1971 | box 38 | folder 395 |
| Information Paper – Management and Program Trends, 1971 | box 39 | folder 396 |
| Information Paper – FAP Project, 1971-1972 | box 39 | folder 397 |
| Appropriation Reports, 1968 | box 39 | folder 398 |

Financial Reviews of Grantees

| Title/Description | Instances | |
|--|-----------|------------|
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| Gregory, Stanley, 1969-1970 | box 39 | folder 400 |
| Akmajian, Herant, 1969-1971 | box 39 | folder 401 |
| Stewart, Charles, 1969 | box 39 | folder 402 |
| Stewart, Charles, 1970 | box 40 | folder 403 |
| Stewart, Charles, 1971 | box 40 | folder 404 |
| Bishop, Jeremy and Charles Stewart, 1970 | box 40 | folder 405 |
| Masone Jr., Nunzio, Ronald Esola, and Charles Stewart, 1970-1971 | box 40 | folder 406 |
| Wolf, Thomas, 1970-1971 | box 40 | folder 407 |
| Esola, Ronald, 1971 | box 40 | folder 408 |
| Esola, Ronald, 1972 | box 40 | folder 409 |
| Masone Jr., Nunzio, 1972 | box 40 | folder 410 |
| Wolf, Thomas, Leonard Spilka, and Charles Stewart, 1972 | box 40 | folder 411 |

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|--|--------|------------|
| Stewart, Charles, 1973 | box 41 | folder 412 |
| Cavanaugh, Harry and Lee Harris, 1973-1974 | box 41 | folder 413 |
| Masone Jr., Nunzio and Ronald Esola, 1973 February-June | box 41 | folder 414 |
| Masone Jr., Nunzio and Ronald Esola, 1973 July-December | box 41 | folder 415 |
| Masone Jr., Nunzio and Ronald Esola, 1974 | box 41 | folder 416 |
| Wolf, Thomas, Leonard Spilka, and Ronald Walker, 1973-1975 | box 41 | folder 417 |
| Cavanaugh, Harry, 1974-1975 | box 41 | folder 418 |
| Doran, John, 1974 | box 41 | folder 419 |
| Doran, John, 1975 | box 41 | folder 420 |

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Self Study, 1955-1979 (bulk)

Arrangement

Items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Series VIII, Self Study, is housed in three archival boxes. The series consists of various task forces and other studies the Foundation conducted on itself. Studies cover topics such as financial accounting, overseas compensation, FAP resource allocation, and telecommunications. The series consists of memoranda, correspondence, reports, questionnaires, newspaper articles, charts, and notes.

Scope and Contents

Self Study The Self Study series contains a number of self studies and task forces that the Foundation conducted in order to learn more about itself and how it runs in order to improve Foundation policies and procedures. There are a few studies on overseas offices (Overseas Development Self Study, Overseas Compensation Study, and Overseas Task Force) that can be used in conjunction with the Overseas series in order to round out the researchers knowledge of the overseas component of the Foundation's administration. There are a number of other studies dealing with the size of the Foundation in terms of assets and expenditures. For instance, Paul Strasburg's paper on the size of Foundation argues breaking the Foundation into smaller divisions, basing his argument on the various effects the action would cause for the public. Trottenberg, ever concerned with the Foundation's need for retrenchment, disagreed with Strasburg's proposal, arguing that decentralizing the Foundation would increase its general management costs. Other studies also deal with the issue of the Foundation's costs, such as the Cost Comparison Study. Some studies deal less directly with how the Foundation is run, and more on how it can expand its program areas. For instance, the Telecommunications Task Force aimed to study the impact of telecommunications, beyond just television, on society, in order to assess how the Foundation could be involved in the field.

| Title/Description | Instances | |
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| Self Study Committee, 1971-1972 | box 42 | folder 421 |
| Task Force on Financial Accounting, 1971 | box 42 | folder 422 |
| Ford Foundation Size, 1955-1973 | box 42 | folder 423 |

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|--|--------|------------|
| Cost Comparison Study, 1972-1973 | box 42 | folder 424 |
| Joint Cost Study, 1973-1979 | box 42 | folder 425 |
| Goals and Objectives for Administration, 1960-1967 | box 42 | folder 426 |
| The People at Ford, 1972 | box 42 | folder 427 |
| Overseas Development Self Study, 1966 | box 43 | folder 428 |
| Overseas Development Self Study, 1966-1967 | box 43 | folder 429 |
| Overseas Questionnaire and Results, 1968 | box 43 | folder 430 |
| Overseas Compensation Study, 1968-1969 March | box 43 | folder 431 |
| Overseas Compensation Study, 1969 April-August | box 43 | folder 432 |
| Overseas Compensation Study, 1969 September-November | box 43 | folder 433 |
| Overseas Task Force, 1972-1974 | box 43 | folder 434 |
| FAP, Resource Allocation Study, 1970 | box 43 | folder 435 |
| FAP, Resource Allocation Study, 1971 January-April | box 44 | folder 436 |
| FAP, Resource Allocation Study, 1971 May-August | box 44 | folder 437 |
| Telecommunications Task Force, 1972-1973 | box 44 | folder 438 |

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Subject Files, 1949-1979 (bulk)

Arrangement

Folders are arranged alphabetically by topic, and items within each folder are arranged chronologically, maintaining original order.

Scope and Contents

Series IX, Subject Files, is housed in thirteen archival boxes. The series consists of a number of topical subject files. Some of the most significant and widely-covered topics include affirmative action, the agricultural institutes dependent upon Foundation support, the Employment Retirement Income Security Act of 1974 (ERISA), retrenchment of Foundation expenses, and the Tax Reform Act of 1969. The series consists of memoranda, correspondence, telegrams, reports, policy papers, speeches/statements, questionnaires, newspaper articles, charts, notes, photographs, and blueprints.

Scope and Contents

Subject Files The Subject Files series contains the topical subject files, documenting many of the activities and issues with which the Foundation was involved during Trottenberg's time. The topics range from work with Magnum Films to create a documentary of the Foundation's current building at the time of its construction in 1967, to work with a number of grantees, such as Yale University and their Pay As You Earn (PAYE) student loans plan. The series also contains information on housing for then-president, McGeorge Bundy, and Board of Trustees member, Julius A. Stratton. The folders associated with this topic (box 46, folders 454-458) are restricted in their accessibility by researchers. Researchers should consult the Foundation's archivist prior to reviewing the material within those folders. Some of the most significant and well-documented topics in the series include organizations

dependent on Foundation support (particularly several agricultural institutes), the Tax Reform Act of 1969, and the Employment Retirement Income Security Act of 1974, retrenchment of foundation expenses, and affirmative action.

Dependent Organizations: The Ford Foundation gives financial support to many organizations, but some of these receive so much support that they are deemed to be largely, if not wholly, dependent upon the Foundation. This series documents a number of organizations that fall into this category, such as the Institute of International Education (IIE). Relying on the Foundation for general support, IIE is an organization that administers international education and technical assistance programs, and it has worked with many of the Foundation's individual grant projects all over the world. For instance, IIE has worked with several agricultural institutes that are also dependent upon Foundation support. The Foundation helped to establish several agricultural institutes, such as the International Rice Research Institute (IRRI) in the Philippines. IRRI was established in 1960 order to accelerate and improve the development of rice varieties and their production techniques. Other, agricultural research and training centers include International Institute of Tropical Agriculture in Nigeria, Centro Internacional de Agricultura Tropical in Colombia, and Centro Internacional de Mejoramiento de Maiz Y Trigo in Mexico.

Tax Reform Act of 1969: The Tax Reform Act of 1969, signed into law by President Nixon on December 30, 1969, provides an extensive legal framework requiring philanthropic foundations to be more publicly accountable for their work. For the most part, the Foundation considered the new law to be a positive change, but it would still demand that the Foundation adjust their programs and procedures in order to comply with the new regulations. For instance, in an effort to prevent foundations from being misused in such a way that they financially benefit their founders, the Act set requirements such as a minimum payout of six percent of assets or of full next investment income (whichever is higher). Other provisions include a new kind of "expenditure responsibility" over grants, demanding that foundations perform certain monitoring duties that previously had been the responsibility of the Internal Revenue Service, and a four percent excise tax on the net investment income of foundations. The series documents the Foundation's reactions to the Tax Reform Act of 1969 as well as the process through which the Foundation altered its programs and procedures in order to comply with the Act and its related amendments. For basic background information about the legislation's provisions and the Foundation's reactions, the researcher may want to refer to the Ford Foundation Annual Report 1969.

Employment Retirement Income Security Act of 1974: Another law that affected the Foundation during Trottenberg's time was the Employment Retirement Income Security Act of 1974 (ERISA). With the enactment of ERISA, Congress established a new regulatory framework for employee benefit plans, including more detailed requirements relating to fiduciary responsibility. The series documents the Foundation's process of understanding the Act and putting it to work with its own benefits plans, particularly its retirement and thrift plans.

Retrenchment: One of the major issues with which Trottenberg dealt during his tenure at the Foundation was the retrenchment program. In fact, in a memorandum to the staff announcing Trottenberg's retirement from the Foundation, then-president, Franklin Thomas, paid particular attention to Trottenberg's diligence in dealing with the difficulties stemming from the Foundation's retrenchment period.

The latter half of the 1970s was marked by a period of severe reduction of the Foundation's general management costs and program budgets. Financial reductions first became a necessity in 1967 and 1971 in order to preserve the Foundation's longevity. However, the Foundation's projections at those times were too hopeful, and combined with the bad economies of 1973 and 1974, the Foundation needed to undergo even larger reductions in order to remain a stable institution. Thus, at the December 1974 meeting of the Board of Trustees, a new target for annual spending was set at \$100 million, requiring a 50% budget cut. Budget cuts were implemented across all areas of Foundation spending – from a reduced size and decrease in the number of grants to the termination of employees. Trottenberg recommended setting up an appropriation from the Foundation's General Funds to create a Retrenchment Fund. First recommended in 1975 and expected to last as long as 1979, the Retrenchment Fund began as \$500,000 set aside by the Foundation to cover costs associated with the retrenchment program. For instance, the IBM Computerized Energy Conservation Power Management System was utilized to conserve energy and in turn, it reduced operating costs of the Foundation's building. Since the system helped to cut costs, its installation was charged to the Retrenchment Fund.

The series documents the retrenchment program from setting up the Retrenchment Fund to how the financial reductions would affect all aspects of the Foundation, such as employees and field offices.

Affirmative Action: As affirmative action for women and minorities became an important social movement in the 1970s, Trottenberg paid particular attention. He emphasized hiring women and minorities as Foundation employees, as well as hiring minority consultants. The concern for affirmative action was such that a subcommittee of the Affirmative Action Committee, chaired by William Gormbley, was created in order to study the possibility of revitalizing the Training Associate Program in an attempt to improve the Foundation's affirmative action program. The affirmative action folders in the Subject Files series include Trottenberg's background research on the affirmative action policies of other institutions, and document creating and abiding by affirmative action policies within the Foundation.

Though the bulk of materials on this subject are found in the Subject Files series, this issue was clearly important to Trottenberg, as his emphasis on it is evident throughout the entire collection. For instance, in the Financial series, a folder on consulting firm Lucas, Tucker, and Company contains a study by Bert Mitchell, and strongly encouraged by Trottenberg, on the presence of black CPAs in the accounting profession. Evidence of Trottenberg's concern for affirmative action is also present in such series as Administration and Operations and Memoranda and Correspondence.

| Title/Description | Instances | |
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| Administrative Conference, 1971-1972 | box 44 | folder 439 |
| Affirmative Action – General Material and Clippings, 1972-1975 | box 44 | folder 440 |
| Affirmative Action – General Material and Clippings, 1970-1972 | box 44 | folder 441 |
| Affirmative Action – General Material and Clippings, 1971-1973 | box 44 | folder 442 |
| Affirmative Action – General Material and Clippings, 1970-1972 | box 44 | folder 443 |
| Affirmative Action – General Material and Clippings, 1970 | box 45 | folder 444 |
| Affirmative Action – Role of Women at Ford Foundation, 1971 January-March | box 45 | folder 445 |
| Affirmative Action – Role of Women at Ford Foundation, 1971 May-1972 | box 45 | folder 446 |
| Affirmative Action – Drake-Beam Study, 1970 | box 45 | folder 447 |
| Affirmative Action – Drake-Beam Study, 1971 January | box 45 | folder 448 |
| Affirmative Action – Drake-Beam Study, 1971 February-1973 | box 45 | folder 449 |
| Affirmative Action – Towers, Perrin, Forster & Crosby, 1972-1973 | box 45 | folder 450 |
| Affirmative Action – Ulric Hayes and Minority Personnel, 1967-1972 | box 45 | folder 451 |
| Affirmative Action – Job Opportunities, 1972-1975 | box 45 | folder 452 |
| American Historical Association, 1965-1970 | box 46 | folder 453 |
| Apartment – Bundy, McGeorge, 1966-1976 | box 46 | folder 454 |
| Apartment – Bundy, McGeorge, 1966-1967 | box 46 | folder 455 |
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| Dependent Organizations – International Food Policy Research Institute, 1975-1976 | box 47 | folder 468 |
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| Dependent Organizations – Agricultural Institutes, 1974-1977 | box 49 | folder 479 |
| Dependent Organizations – Agricultural Institutes, budgets - FY 1970, 1969 | box 49 | folder 480 |
| Dependent Organizations – Agricultural Institutes, benefits, 1969 | box 49 | folder 481 |
| Dependent Organizations – Consultative Group for International Agricultural Research, 1977 | box 49 | folder 482 |
| Doane Agricultural Service, 1970 | box 49 | folder 483 |
| Edison Institute, 1970 | box 49 | folder 484 |

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| Energy Policy Project, 1971-1974 | box 49 | folder 485 |
| Employment Retirement Income Security Act of 1974 (ERISA), 1973-1974 September | box 49 | folder 486 |
| ERISA, 1974 October-December | box 50 | folder 487 |
| ERISA, 1975 January-September | box 50 | folder 488 |
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| ERISA, 1975 November | box 50 | folder 490 |
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| Ford Family Painting, 1973-1978 | box 50 | folder 493 |
| Haile Selassie I University, 1969-1971 | box 51 | folder 494 |
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| Metropolitan Applied Research Center, Inc., 1970 | box 52 | folder 503 |
| New York City Schools, 1968 | box 52 | folder 504 |
| Overseas Schools Advisory Council, 1971-1974 | box 52 | folder 505 |
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| Pay As You Earn (PAYE) Student Loans, 1969-1971 | box 52 | folder 507 |
| Peterson Commission, 1969-1970 | box 52 | folder 508 |
| Rand Corporation, 1969-1970 | box 52 | folder 509 |
| Retrenchment, general, 1974 | box 52 | folder 510 |
| Retrenchment, general, 1975 January-February | box 52 | folder 511 |
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| Taconic Foundation, 1969 | box 53 | folder 520 |
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| Tax Reform Act of 1969 – House Ways and Means Committee, 1969 April-May | box 54 | folder 530 |
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| Tax Reform Act of 1969 – Impact on Foundations, 1969-1970 | box 55 | folder 532 |
| Tax Reform Act of 1969 – Statements of Initial Witnesses Appearing Before the Senate Finance Committee, 1969 | box 55 | folder 533 |
| Tax Reform Act of 1969 – Statements of Initial Witnesses Appearing Before the Senate Finance Committee, 1969 | box 55 | folder 534 |
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| Tax Reform Act of 1969 – Congressman Patman, 1970-1974 | box 55 | folder 536 |
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| Travel Program for Foreign Diplomats, 1969-1977 | box 55 | folder 538 |
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| United Fund of Greater NY, 1970-1971 | box 56 | folder 540 |
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| Yale University, 1969-1971 | box 56 | folder 546 |

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Real Estate, 1966-1979 (bulk)

Scope and Contents

The General subseries contains general information on the Foundation's investments in real estate, as well as information on all real estate investments that fall outside of the U.N.D.C. The U.N.D.C subseries is the stronger of the two in this series. It contains material documenting the development of the U.N. area from the setting up of bylaws for the U.N.D.C. to information on some specific real estate investments such as the Beaux Arts Hotel. The series consists of memoranda, correspondence, reports, press releases, newspaper articles, notes, maps, and blueprints.

Arrangement

Series X, Real Estate, is housed in five archival boxes, and is divided into two subseries: General and United Nations Development Corporation (U.N.D.C.). Items within the folders are arranged chronologically, maintaining original order.

Scope and Contents

Real Estate The Real Estate series contains information on the Foundation's investments in real estate, particularly focusing on the United Nations Development Corporation (U.N.D.C.). In fact, the decision by the Board of Trustees to locate the current Foundation building in the vicinity of the United Nations was made with the express idea that the new building could then serve as a catalyst for developing and improving the entire area. Soon after the Foundation's building was built, the Board of Trustees Executive Committee began a real estate investment plan to acquire 28 properties located in a two block "core development area" spanning between 43rd and 45th Streets and 1st and 2nd Avenues. The initial work in setting up this real estate investment plan in the U.N. area predated Trottenberg, but he quickly became involved once his term at the Foundation began. In the May of 1968, just before Trottenberg joined the Foundation, the New York State Legislature passed a law that set the two block core development area aside as the United Nations Development District. The law also created the United Nations Development Corporation to develop the district or to make arrangements with private sponsors to develop it. The Foundation's involvement with and financial support for the U.N.D.C. was motivated by a desire to improve the area of the U.N. in order to serve public interest by demonstrating the possibility to effect dramatic, qualitative changes with a strong social purpose through cooperation of the public and private sectors.

General

| Title/Description | Instances | |
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| Real Estate, general, 1970-1971 | box 56 | folder 547 |
| Investment Reports, 1972 | box 56 | folder 548 |
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| Financial Reports, 1973-1974 | box 56 | folder 550 |
| Wholly-Owned Subsidiaries, 1976 | box 56 | folder 551 |
| Portfolio Reviews, 1976 | box 56 | folder 552 |

| Real Estate Strategy Paper, 1977 | box 56 | folder 553 |
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| United Nations Development Corporation (U.N.D.C.) | | |
| Title/Description | Instances | |
| United Nations Development Corporation, general, 1966-1969 | box 56 | folder 554 |
| U.N.D.C., general, 1970 | box 57 | folder 555 |
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| Development of U.N. Area, 1967 January-June | box 57 | folder 561 |
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| Bills, Bylaws, and Reports, etc., 1968-1971 | box 58 | folder 565 |
| Hammer, Greene, Siler Associates, 1967 | box 58 | folder 566 |
| U.N.D.C. Board of Directors, 1968-1971 | box 58 | folder 567 |
| U.N.D.C. Board of Directors, meeting, 1969 January 30 | box 58 | folder 568 |
| U.N.D.C. Board of Directors, meeting, 1969 May 12 | box 58 | folder 569 |
| U.N.D.C. Board of Directors, meeting, 1969 August 4 | box 58 | folder 570 |
| U.N.D.C. Board of Directors, meeting, 1969 August 18 | box 58 | folder 571 |
| U.N.D.C. Board of Directors, meeting, 1969 October 30 | box 58 | folder 572 |
| U.N.D.C. Clippings and Charts, 1968-1971 | box 59 | folder 573 |
| Transfer of Real Estate to U.N.D.C., 1971 | box 59 | folder 574 |
| Fund for Area Planning and Development Grants, 1968-1971 | box 59 | folder 575 |
| U.N.D.C. – Recoverable Grant, 1979 | box 59 | folder 576 |
| Beaux Arts Hotel, 1968 | box 59 | folder 577 |
| The Eye Cinema, 1968-1969 | box 59 | folder 578 |
| John H. Muller, Real Estate Consultant, 1967 | box 59 | folder 579 |

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Board of Trustees, 1962-1979 (bulk)

Scope and Contents

Board of Trustees The Board of Trustees series primarily contains information on Board meetings ranging from 1967 to 1979. It also includes the Executive Committee and the Finance Committee meetings from this time. These folders contain materials such as Minutes from the meetings, as well as reports to be discussed at the meetings and press releases announcing decisions solidified at the meetings. Dockets and Treasurer's Reports, however, have been removed from the folders; thus, this series is best used in conjunction with the Board of Trustees, Executive Committee, and Finance Committee Records. In addition to the various meetings, the series contains information on (topics in general folders), as well as correspondence with some of the Board's members, such as Julius A. Stratton, Alexander Heard, and Walter Haas. Particularly interesting is a folder about Henry Ford II's resignation from the Board of Trustees. As the son and grandson of the two Fords that established the Foundation in 1936, Henry II had a personal connection to the Foundation, as well as a respect for the Foundation's work. After 33 years as a trustee, Ford was the longest-standing Board member at the time of his resignation in 1977. Ford served the Foundation from its early, informal beginnings and helped transition it to its more structured state when the Foundation became a national and international philanthropy in 1950. Ford's letter of resignation left the Foundation with some of his criticisms of how things were being run, attracting a host of negative media coverage, some of which is included in the collection.

Scope and Contents

The series consists of memoranda, correspondence, telegrams, reports, policy papers, press releases, newspaper articles, and notes.

Separated Materials:

Separated Materials

Some materials, such as Minutes from the meetings, Dockets, and Financial Reports, have been removed from the collection and can be found within their respective collections (see Appendix D).

Arrangement

Series XI, Board of Trustees, is divided into two subseries: General and Meetings. The General subseries contains assorted information about the Board of Trustees and some of its members, including information on Henry Ford's resignation from the Board. The Meetings subseries is divided by regular Board of Trustees meetings, Executive Committee meetings, and Finance Committee meetings, with meetings arranged chronologically. Items within folders are arranged chronologically, maintaining original order.

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| Future Planning Project, 1975 | box 62 | folder 618 |
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| Executive Committee, 1975-1977 | box 62 | folder 623 |
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Appendix A: Staff and Consultant Reports in Collection: Administrative Arrangement

The following reports can be found within the collection. The report number is provided for those reports that can be found elsewhere in the archives. The list is alphabetical by title.

| Title/Description | Instances | |
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| A Decision Structure for Ford Foundation Operations | box 30 | folder 301 |
| A Group Insurance Plan - The Equitable Life Assurance Society of the United States, 1973 June | box 10 | folder 86 |
| A Preliminary Checklist for Considering the Question of Size (draft) - Paul A. Strasburg, 1972 November 20 | box 42 | folder 423 |
| A Response to the Trustees on Proposed Priorities, Special Questions, and Remaining Hard Choices - McGeorge Bundy, 1976 November | box 2 report 3450 | folder 10 |
| A Review of P.R.I. and Suggested Directions - Marshall and MacDevitt, 1970 March | box 36 | folder 380 |
| A Review of the Management Information System (draft) - Verne S. Atwater and Phil Kemp, 1967 August 7 | box 30 | folder 301 |
| A Survey of Present Information Flow - Documentation Incorporated, 1967 March | box 29 report 13403 | folder 284-286 |
| A Systems Perspective of the Retirement Process - Towers, Perrin, Forster and Crosby, 1973 January | box 28 | folder 276 |
| Access to Ford Foundation Records: A Policy Proposal (draft) - Robert V. Williams, 1973 February 8 | box 30 | folder 294 |
| Access to Ford Foundation Records: A Policy Proposal (draft) - Robert V. Williams, 1973 August 8 | box 10 | folder 85 |
| Access to Ford Foundation Records: Policy and Procedures - Ford Foundation, 1974 April 4 | box 30 report 9278 | folder 294 |
| Accounting for PRI Activities (Discussion Paper, draft) - Kieran M. Bracken, 1969 June | box 20 | folder 190 |
| Administering 'Program' Investments | box 6 | folder 46 |

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| Administering the Program-Related Investment Account: PRIA's Policies, Procedures and Recommendations | box 6 | folder 47 |
| Administration Plans for 1966 - Verne S. Atwater, 1965 April 19 | box 42 | folder 426 |
| Administration: Problems, Plans, and Projects - 1968, 1967 September | box 3 | folder 17 |
| Administrative Management Review (International Rice Research Institute) - William P. Gormbley, A.G. Samonte, and M.E. Ruddy, 1974 January 11 | box 49 report 6448 | folder 479 |
| An Affirmative Action Program for the Employment of Women and Minorities on the Professional Staff - McGeorge Bundy, 1972 June 13 | report 1996 box 59 | folder 586 |
| An Analysis of Salary Structure and Pay Practices for Professional and Managerial Employees - Robert H. Hayes and Associates, Inc., 1978 August 22 | box 27 | folder 266 |
| An Evaluation of Information Systems and Services - Cresap, McCormick, Paget, Inc., 1973 July | box 29 report 13078 | folder 288 |
| An Experimental Approach to Foundation Organization and Administration - Verne S. Atwater, 1966 June | box 3 | folder 16 |
| Analysis of Private Foundation Financial Data (draft) - M.J. Gross, Jr., Price Waterhouse and Company, 1974 | box 18 | folder 159 |
| Analysis of Proposals for Providing Recordkeeping Services for the Ford Foundation Thrift Plan - Towers, Perrin, Forster and Crosby, 1974 January 23 | box 30 | folder 300 |
| Analysis of the Report on the Investment Management and Research Compensation Survey - Towers, Perrin, Forster and Crosby, 1974 January 11 | box 28 | folder 278 |
| Annual Report - President's Review (draft) - McGeorge Bundy, 1970 January | box 1 | folder 2 |
| Annual Report of the Treasurer (supplement to Annual Report 1968, draft) - Thomas H. Lenagh, 1968 September 19 | box 9 | folder 71 |
| Approaches to Determining Special Retirement Compensation - Towers, Perrin, Forster and Crosby, 1973 February | box 28 | folder 276 |
| Asia and Pacific - Towers, Perrin, Forster and Crosby, 1970 | box 34 | folder 340 |
| Attitude Survey Concerning the Role of Women at the Ford Foundation - Drake-Beam and Associates, 1970 December | report 6002 box 45 | folder 448 |
| Automated Systems (Status Report) - Kieran M. Bracken, 1969 September | box 31 | folder 313 |
| Automated Systems for Portfolio Management and Securities Accounting - Information Systems and Services, 1970 July | box 31 | folder 315 |

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| Automated Systems for: Bonds Portfolio Management and Securities Accounting - Information Systems and Services, 1973 August | box 31 | folder 315 |
| Background Report on Special New York City Compensation Techniques - Towers, Perrin, Forster and Crosby, 1970 September 17 | box 27 | folder 271 |
| Balance of Payments Problem - Thomas H. Lenagh, 1965 March | box 16 | folder 135 |
| | report 2787 | |
| Careers with the Foundation - George F. Gant, 1969 November 13 | box 35 | folder 361 |
| | report 2695 | |
| Cash and Accrual Methods of Accounting (memo) - Richard Goodyear, 1971 November 19 | report 8831 | |
| | box 42 | folder 422 |
| Centro Internacional de Agricultura Tropical: Accounting Manual - Bert Mitchell, 1969 | box 48 | folder 475 |
| Certain Federal Income Tax Withholding and Reporting Requirements (draft) - Webster, Sheffield, Fleischmann, Hitchcock and Brookfield, 1971 February 23 | box 4 | folder 31 |
| Changes in Your Benefit Program - Ford Foundation, 1970 January 1 | box 26 | folder 262 |
| Charter and Bylaws of the Ford Foundation - Ford Foundation, 1957 December | box 47 | folder 461 |
| Claims on General Reserve - McGeorge Bundy, 1978 November | box 61 | folder 617 |
| Code of Bylaws - Ford Foundation, 1964 December | box 47 | folder 461 |
| Comments on Combining Realized and Unrealized Appreciation of Foundation's Investments - Audit Committee Meeting, December 7 - Price Waterhouse and Company, 1972 December 20 | box 18 | folder 158 |
| Comments on Deferred Compensation - Towers, Perrin, Forster and Crosby, 1968 September | box 27 | folder 267 |
| Comments on Possible Thrift Plan Trustees - Towers, Perrin, Forster and Crosby | box 28 | folder 278 |
| Comments on the Foundation as Employer - Haldore Hanson, 1969 December | report 2695 | |
| | box 35 | folder 361 |
| Committee on Ways and Means: Statement by McGeorge Bundy (draft) - McGeorge Bundy, 1969 February 16 | report 10880 | |
| | box 53 | folder 521 |
| Comparison of Capital Accumulation Employee Benefit Plans for Financial Institutions - Towers, Perrin, Forster and Crosby, 1974 February 28 | box 28 | folder 278 |
| Compensation of Ford Foundation Employees - John D. Smyers, 1968 August 15 | box 27 | folder 264 |

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| Comptroller's Department Reorganization and Computer Planning Study (draft, missing pages) - Ford Foundation, 1975 December | box 31 | folder 308 |
| Computer Facility Service Agreements: A Way of Reducing Operating Expenses - Sandy S. Mistretta, 1972 | box 31 | folder 305 |
| Conclusions to 'Planning for the Foundation's Program in 1973 and Beyond' (memo) - Roger G. Kennedy, 1972 June 21 | box 63 | folder 631 |
| Consultative Group on International Agricultural Research - Report of the Review Committee - Review Committee, Consultative Group on International Agricultural Research, 1977 January | box 49 | folder 482 |
| Cost Reductions in the Investment Operation - Roger G. Kennedy, 1975 June | box 64 report 9186 | folder 643 |
| Data Processing Systems - Budget Report, 1969 March | box 31 | folder 312 |
| Data Systems Proposal: Automated Accounts Payable System - E.D.P./Systems Department, 1969 March | box 30 | folder 303 |
| Deferred Compensation and Related Salary and Benefit Considerations - Towers, Perrin, Forster and Crosby, 1968 December 9 | box 27 | folder 267 |
| Development Potentials of the Turtle Bay Area of Manhattan - Hammer, Greene, Siler Associates, 1967 March 29 | box 58 | folder 566 |
| Direct Placement Portfolio Strategy and Valuation - Roger G. Kennedy, 1970 September 10 | box 62 | folder 626 |
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| Staffing Implications of Investment Policy (memo) - Roger G. Kennedy, 1972 September 18 | box 63 | folder 632 |
| Statement Before the Senate Finance Committee Julius A. Stratton, 1969 September 9 | box 60 report 3777 | folder 591 |
| Statement by McGeorge Bundy, President of the Ford Foundation to the Committee on Ways and Means, U.S. House of Representatives, on Proposals in Treasury Department Report on Private Foundations - McGeorge Bundy, 1969 February 20 | report 10880 box 54 | folder 528 |
| Statement of Peter G. Peterson - Chairman, Commission on Foundations and Private Philanthropy - Before the Senate Finance Committee - Peter G. Peterson, 1969 October 22 | box 52 | folder 508 |
| Status of Plans and Projects - Administration Division - Verne S. Atwater, 1968 May 7 | box 3 | folder 17 |

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| Status Report to Ford Foundation by Documentation Incorporated - Documentation Incorporated, 1967 February 7 | box 30 | folder 301 |
| Study of Approaches Toward Fostering Professional Staff Mobility - Towers, Perrin, Forster and Crosby, 1971 July 1 | box 28 | folder 273 |
| Study of Basic and Supplementary Severance Arrangements - Towers, Perrin, Forster and Crosby, 1973 June 6 | box 28 | folder 276 |
| Study of Personnel Policies and Employee Benefits - Towers, Perrin, Forster and Crosby, 1970 December | box 27 | folder 272 |
| Study of Personnel Systems and Related Matters - Cresap, McCormick, Paget, Inc., 1975 January | box 25 | folder 250 |
| Study of Professional Staff Workload - Thomas Cooney and Basil Whiting, 1969 November | box 44 report 13397 | folder 436 |
| Study of Retirement Program - Towers, Perrin, Forster and Crosby, 1977 November 30 | box 28 | folder 281 |
| Suggested Monitoring Policy and Procedures for the National Affairs Division (draft) - Basil J. Whiting, 1970 January | box 10 | folder 80 |
| Summary of Benefit Plan and Compensation Review - Towers, Perrin, Forster and Crosby, 1969 April 29 | box 27 | folder 270 |
| Survey of Administrative Organization - Booz, Allen and Hamilton, Inc., 1964 July 20 | report 10421 box 3 | folder 16 |
| Survey of Benefit Program - Towers, Perrin, Forster and Crosby, 1972 May | box 28 | folder 274 |
| Survey of Selected Information on Bank Sponsored Investment Companies - Price Waterhouse and Company, 1974 February | box 18 | folder 159 |
| Survey of Selected Information on Money Market Investment Companies - Price Waterhouse and Company, 1974 December | box 18 | folder 159 |
| Survey of Special Retirement Programs - Preliminary Report - Towers, Perrin, Forster and Crosby, 1973 January | box 28 | folder 276 |
| Survey of the Grants Processing System (draft) - Leo L. Kornfeld, 1969 April | box 37 report 5104 | folder 387 |
| Tax and Financial Reporting Requirements - Kieran M. Bracken, 1969 May | box 3 | folder 21 |
| Tax Reform Act of 1969 - Planning and Compliance (draft) - Division of Administration, 1970 September 24 | box 54 | folder 526 |
| Tax Reform Act of 1969 - Planning and Compliance (draft) - Division of Administration, 1970 October 6 | box 54 | folder 526 |
| Technical Memorandum: Ford Foundation Information System Activity Report - T. Wright, 1967 September | box 30 | folder 301 |
| Temporary Procedures for Making 'Individual Grants' Under the New Tax Law (memo, draft) - McGeorge Bundy, 1970 January 26 | box 54 | folder 528 |

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| The Assets of the Ford Foundation for the 1980s - McGeorge Bundy, 1976 April | box 2 | folder 10 |
| The Cash and Accrual Methods of Accounting - Kieran M. Bracken, 1971 October | box 42 | folder 422 |
| The Depository Trust Company (DTC): A Report Prepared for the Ford Foundation - Chase Manhattan Bank, 1974 May | box 4 | folder 28 |
| The Dollars We Will Have Available (draft) - Roger G. Kennedy, 1974 February 19 | box 8 report 11028 | folder 62 |
| The Financiers of Revolution - Allan C. Brownfeld, American Conservative Union, 1969 April | box 54 | folder 530 |
| The First Four Years (memo) - Roger G. Kennedy, 1974 February 4 | box 8 | folder 62 |
| The First Four Years (memo) - Roger G. Kennedy, 1974 March 15 | report 2474 box 63 | folder 638 |
| The Ford Foundation in the 1960s: Statement of the Board of Trustees on Policies, Programs, and Operations - Board of Trustees, 1962 July | box 59 report 2631 | folder 580 |
| The Ford Foundation Logistical Services Department Operating Cost Comparison - James R. Farrell, 1973 March 30 | box 42 | folder 424 |
| The Ford Foundation Real Estate Acquisition Program (memo) - Henry de Kosmian, 1967 January 25 | box 57 | folder 561 |
| The Ford Foundation Real Estate Investment Program 1975 Supplement - Antony Herrey, 1975 December | box 64 | folder 645 |
| The Ford Foundation Real Estate Portfolio Review for the Quarter Ended August 31, 1975 - Ford Foundation, 1975 September | box 64 | folder 644 |
| The Ford Foundation Real Estate Portfolio Review for the Three Months Ended August 31, 1976 - Ford Foundation, 1976 September | box 56 | folder 552 |
| The Ford Foundation Real Estate Portfolio Review for the Three Months Ended May 31, 1976 - Ford Foundation, 1976 June | report 4144 box 56 | folder 552 |
| The Ford Foundation Real Estate Portfolio Review for the Two Months Ended October 31, 1976 - Ford Foundation, 1976 December | box 56 | folder 552 |
| The Ford Foundation Retirement Plan - Ford Foundation, 1969 | box 61 | folder 602 |
| The Ford Foundation Retirement Plan - Brief Comparison of Principal Provisions of Revised Plan and Existing Plan, 1975 November 20 | box 50 | folder 490 |
| The Ford Foundation Retirement Plan (as last approved by IRS) - Ford Foundation, 1975 June 23 | box 50 | folder 488 |

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| The Ford Foundation Retirement Plan (Revised Discussion Draft) - Ford Foundation, 1975 November 3 | box 50 | folder 490 |
| The Ford Foundation Retirement Plan (Revised Draft) - Ford Foundation, 1975 November 11 | box 50 | folder 490 |
| The Ford Foundation Retirement Program Study - Status Report - Towers, Perrin, Forster and Crosby, 1977 September 2 | box 28 | folder 280 |
| The Ford Foundation Study of Retirement Program - Towers, Perrin, Forster and Crosby, 1978 September | box 29 | folder 283 |
| The Ford Foundation Thrift Plan - Ford Foundation, 1969 | box 61 | folder 602 |
| The Ford Foundation Thrift Plan - Brief Comparison of Principal Provisions of Restated Plan and Existing Plan (draft), 1975 December 15 | box 50 | folder 491 |
| The Ford Foundation Thrift Plan - Financial Statements - Price Waterhouse and Company, 1975 December 31 | box 18 | folder 160 |
| The Ford Foundation Thrift Plan (as last approved by IRS) - Ford Foundation, 1973 April 18 | box 50 | folder 488 |
| The Ford Foundation Thrift Plan: Personnel Policy 3.5 - Ford Foundation, 1975 December 24 | box 50 | folder 491 |
| The Ford Foundation: Custody/Securities Accounting/Portfolio Management - Selection of Bradford National Corporation - Center for Management Technology, Inc., 1976 August | box 32 | folder 320 |
| The Ford Foundation: Dental Benefits - Towers, Perrin, Forster and Crosby, 1973 August 21 | box 10 | folder 86 |
| The Ford Foundation's Program in the Changing Role of Women (Information Paper) - Task Force on Equal Opportunity for Women, 1973 March | box 45 report 2255 | folder 449 |
| The Foundation as Socially Responsible Investor (memo) - McGeorge Bundy and Roger G. Kennedy, 1972 March | box 63 | folder 630 |
| The Foundation's Foreign Investments Through Canadian NRO's: Some Accounting and Reporting Implications - Kieran M. Bracken, 1973 September 26 | box 4 | folder 27 |
| The Foundation's Future Financial Condition: Some Numerical Projections - Jon L. Hagler, 1978 June | box 64 report 4121 | folder 648 |
| The Foundation's Organization for Overseas Development: A Few Observations and Suggestions - Courtney A. Nelson and George Zeidenstein, 1970 January 5 | box 32 report 10975 | folder 323 |
| The Foundation's People and Their Work - Merrimon Cuninggim, 1975 February 18 | box 2 report 11002 | folder 14 |
| The Impact of ERISA on the Retirement Plan Final Pay Minimum Benefit - Towers, Perrin, Forster and Crosby, 1975 August | box 28 | folder 279 |

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| The International Division's Budget in FY 1978 (Discussion Paper, draft) - Ford Foundation, 1973 September | box 35 report 10119 | folder 358 |
| The Investment Process and Budgetary Planning Through 1975 - Roger G. Kennedy, 1972 November 27 | box 63 | folder 633 |
| The New Overseas Compensation Plan, 1977 June | box 33 | folder 329 |
| The People at Ford - Marshall A. Robinson, 1972 March 7 | box 42 report 6683 | folder 427 |
| The Personnel Department - Role and Objectives - Ford Foundation, 1965 April 1 | box 23 | folder 218 |
| The President's Review of Law and Orderly Justice - McGeorge Bundy, 1971 | box 1 | folder 3 |
| The Pricing and Chargeback of Information Systems and Services (draft) - Sandy S. Mistretta, 1975 March | box 4 | folder 29 |
| The Role of Women in the Ford Foundation - Arthur D. Trottenberg, 1971 June | box 45 report 6316 | folder 446 |
| The Role of Women in the Ford Foundation (memo) - Arthur D. Trottenberg, 1971 May 19 | box 1 | folder 3 |
| The Uses and Abuses of Performance Measurement - Roger G. Kennedy, 1973 August | report 5033 box 63 | folder 636 |
| Third-Country Nationals... And Offshore Funds - Towers, Perrin, Forster and Crosby, 1969 February | box 32 | folder 326 |
| Thrift Plan (revised draft) - Ford Foundation, 1975 December 19 | box 2 | folder 9 |
| Top Management Organization: A Research Report on the Office of the President - Towers, Perrin, Forster and Crosby, 1971 June | box 2 | folder 15 |
| Travel and Study Awards: Administrative Procedures - Verne S. Atwater, 1968 January 15 | report 6903 box 37 | folder 385 |
| Travel and Study Manual (draft) - Ford Foundation, 1969 | report 12475 box 37 | folder 385 |
| Trust Agreement: The Ford Foundation and First National City Bank, 1969 | box 61 | folder 602 |
| Uniform Program Classifications for Expenditures of Philanthropic Foundations: Phase I Feasibility Study - Peat, Marwick, Mitchell and Co., 1973 June | box 42 | folder 425 |
| United Nations Development Corporation First Step Development (draft) - Debevoise, Plimpton, Lyons, and Gates, 1970 December | box 57 | folder 555 |
| Untitled report (topic: investment policy, revised draft) - Roger G. Kennedy, 1970 August 7 | box 62 | folder 626 |

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| Use of FAPs and Grant Suballocations (draft) - John S. Nagel, 1971 April 22 | box 38 report 11620 | folder 394 |
| User's Guide: Program Action - Master Report - Documentation Incorporated, 1967 September 30 | box 30 | folder 301 |
| User's Guide: Program Action - Number Index Report - Documentation Incorporated, 1967 September 30 | box 30 | folder 301 |
| Ways and Means Committee Bill, Qualifying Distributions - Private Operating Foundations and Their Significance for the Ford Foundation, 1969 August | box 54 | folder 531 |
| Writing Exchange - Traded Options: A Proposal - Jerry Anderson, et al., 1975 September 5 | box 64 | folder 644 |

Appendix B: Staff and Consultant Reports in Collection: Programmatic

Arrangement

The following reports can be found within the collection. The report number is provided for those reports that can be found elsewhere in the archives. The list is alphabetical by author.

| Title/Description | Instances | |
|--|------------------------|------------|
| International Institute of Tropical Agriculture: Points for Discussion Concerning the Program and the Construction Project - Albrecht, H.R., 1969 February | box 48 | folder 473 |
| A Commentary on a Series of Grants by the Ford Foundation to the Educational Facilities Laboratories, Inc. 1958-1975 - Armsey, James W., 1976 September | box 47 report 12263 | folder 467 |
| Experiments in Making Foundation Credit Available to the Poor - Atterbury, B.P. | box 6 | folder 46 |
| Organization and Structure of BNS - Atwater, Verne S., 1966 | box 55 | folder 537 |
| F.C.C. Television Proposal - Atwater, Verne S., 1966 July 26 | box 55 report 10943 | folder 537 |
| Structure of BNS - Atwater, Verne S., 1966 November 16 | box 55 | folder 537 |
| Proposed Organization for the National Experimental Satellite Test Program - Atwater, Verne S., 1966 November 23 | box 55 | folder 537 |
| Organization and Structure of a Non-Profit Communications Satellite System - Atwater, Verne S., 1966 December | box 55 | folder 537 |
| Travel and Study Award Program - Atwater, Verne S., 1967 January 20 | box 37 report 6907 | folder 385 |
| Thoughts About Financing a National Educational Television Network - Atwater, Verne S., 1968 February 8 | box 55 | folder 537 |
| Program Strategy: 1970-1975 (memo, draft) - Bell, David E., 1968 October 21 | box 36 | folder 366 |

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| The Foundation and the Less-Developed Countries - The Decade of the Seventies (draft) - Bell, David E., 1971 September | report 2741 box 35 | folder 363 |
| Assessment of Efforts to Assist Underdeveloped Areas - Bell, David E., 1971 December | box 10 | folder 84 |
| Budget Planning Paper, FY 1974-1975, International Division (memo) - Bell, David E., 1973 February 23 | report 9010 box 21 | folder 198 |
| Collaboration Among Assistance Agencies (Discussion Notes) - Bell, David E., 1973 September | report 10136 box 35 report 3501 | folder 358 |
| Values, Society, and Culture - Bell, David E. and Francis X. Sutton, 1975 December 11 | box 62 | folder 618 |
| Economic Growth and the Distribution of Economic Opportunity and Benefits Among Men and Nations - Bell, David E. and Marshall A. Robinson, 1975 December 10 | box 62 | folder 618 |
| The Foundation for Housing Innovations, Inc.: A Report to the Ford Foundation - Blackett, Denis A. - The Foundation for Housing Innovations, Inc., 1970 March 12 | box 40 | folder 403 |
| Planning for the Foundation's Program in 1973 and Beyond - Bundy, McGeorge, 1972 March | report 2450 box 36 | folder 367 |
| Two Years Ahead: Ford Foundation Programs for 1974 and 1975 - Bundy, McGeorge, 1973 September | box 9 report 4744 | folder 171 |
| The Hungry, Crowded, Competitive World - Carmichael, William D., 1975 December 12 | box 62 | folder 618 |
| Four Years of Program-Related Investments and Some Issues for the Future - Chafkin, Sol, 1972 August | report 11035 box 36 | folder 378 |
| The New Depression in Higher Education - Implications for the Foundations - Cheit, Earl F., 1973 May 30 | box 9 | folder 77 |
| Report on a Trip to Ford Offices in Asia - January 17-February 19, 1974 - Cuninggim, Merrimon, 1974 February | box 2 report 10997 | folder 13 |
| All Our Ways and Means of Work - A Discussion Paper Prepared for the Board of Trustees - Cuninggim, Merrimon, 1975 March | box 2 report 2789 | folder 14 |
| The Ford Foundation and the U.N. - Cyr, Arthur, 1972 May 15 | box 55 | folder 538 |
| The International Rice Research Institute - Report of the Programme Committee - Dasananda, Sala, N. Parthasarathy, and N. Yamada, 1969 February 3 | box 48 | folder 473 |
| Development Indicator Chartbook - Dean Economics, Inc., 1966 September 30 | box 43 | folder 428 |

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| | report 3071 | |
| Program-Related Investments: A Two-Year Review - Division of Administration, 1976 May | box 6 report 2993 | folder 52 |
| Travel and Study Awards (Information Paper) - Division of Administration, Manpower Services, 1967 September | box 37 report 2903 | folder 385 |
| The Ford Foundation and Afro-American Studies - Division of Education and Research, 1969 March 26 | box 60 report 4847 | folder 599 |
| Education and Research Division: Budget Statement, Fiscal Years 1974 and 1975 - Division of Education and Research, 1973 February 20 | box 21 | folder 198 |
| Education and Research Division: Budget Statement, Fiscal Years 1974 and 1975 - Division of Education and Research, 1973 May 2 | box 21 | folder 198 |
| Student Educational Investment Guarantees: For Income-Related Payment Plans in Colleges and Universities - Division of Education and Research, Higher Education and Research, 1970 December | box 56 | folder 546 |
| PAYE: Final Recommendations - Division of Education and Research, Higher Education and Research, 1971 June | report 3482 box 52 | folder 507 |
| The Ford Foundation and the New York City Schools - Division of Education and Research, Public Education, 1968 September 27 | report 4844 box 52 | folder 504 |
| Draft of Budget Narrative - Division of National Affairs - Division of National Affairs, 1972 February 22 | box 22 | folder 204 |
| Foundation Loan Guarantees to Universities and Other Non-Profit Organizations (Discussion Paper) - Division of National Affairs, Office of Resources and the Environment, 1967 March 22 | report 3016 box 9 | folder 75 |
| A Program of Energy Policy Studies - Division of National Affairs, Office of Resources and the Environment, 1971 November | report 1974 box 49 | folder 485 |
| The Energy Policy Report: A Report to the Trustees on Planning and Organization - Division of National Affairs, Office of Resources and the Environment, 1972 March | box 49 | folder 485 |
| The Energy Policy Project: Proposed Expansion of the Energy Policy Project - Division of National Affairs, Office of Resources and the Environment, 1972 September | report 2124 box 49 | folder 485 |
| Energy Policy Project - Division of National Affairs, Office of Resources and the Environment, 1973 August | report 2781 box 49 | folder 485 |
| The Feasibility of Establishing 3 to 5 Warm-Up Feedlots in North Central New Mexico - Doane Agricultural Service, Inc., 1970 July 9 | report 3755 box 49 | folder 483 |

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| Proposal for an International Crops Research Institute for the Semi-Arid Tropics (ICRISAT) - Doggett, Hugh, L. Sauger, and Ralph W. Cummings, 1971 October 19 | report 4801 box 48 | folder 476 |
| Education and Society in Developing Nations: Conceptual Relationships and Emerging Opportunities - Edwards, Edgar O. and Michael P. Todaro, 1973 September | report 10130 box 35 | folder 358 |
| Justice, Fairness, and Human Rights - Edwards, Robert H. and R. Harcourt Dodds, 1975 December 9 | box 62 | folder 618 |
| A Study of the Relationship Between Ford Foundation Programs in Public Education and Federal Programs Administered by the United States Office of Education - Ellis II, Harlan Reed, 1969 January | report 1535 box 9 | folder 78 |
| Foundation's Investments on Public Education: What Are the Priorities? (draft) - Ellis II, Harlan Reed, 1969 May | box 9 | folder 78 |
| Financial Review of Southwest Council of La Raza - Phoenix, Arizona - Esola, Ronald, 1971 December | box 40 | folder 408 |
| Asian and Pacific Office Visits - March 1969 - Farrell, James R., 1969 May 1 | box 34 | folder 345 |
| Community Development Conference - Ford Foundation, 1971 June | box 47 report 9253 | folder 463 |
| The Ford Foundation and 'Dependent' Organizations (Information Paper, draft) - Ford Foundation, 1971 September 15 | box 47 report 2109 | folder 466 |
| Audiovisual Reporting of Foundation Supported Activity - Ford Foundation, 1973 March | box 8 report 1977 | folder 69 |
| Comments and Recommendations of the Ford Foundation on the Proposed Regulations Under the Health Maintenance Organization Act of 1973 - Ford Foundation, 1974 May 8 | box 6 report 11036 | folder 52 |
| OD Self-Study (Information Paper) - Ford Foundation, Overseas Development Program, 1966 December | box 43 report 2714 | folder 429 |
| The Language Activities and Interests of the International Division - International Division Conference - Fox, Mel and Elinor Barber, 1971 September | box 35 report 3975 | folder 363 |
| Budget Planning Paper, FY 1974-1975, Public Broadcasting (memo) - Friendly, Fred W. and David M. Davis, 1973 February 26 | box 21 | folder 198 |
| Funds, Pluralism, and the Real Light on the End of the Tube - Friendly, Fred W. | box 9 | folder 79 |
| War, Peace and Cooperation Among Nations - Goodwin, Craufurd D., 1975 December | box 62 | folder 618 |
| Ford Foundation Presidential Fellows (revised draft) - Gormbley, William P., 1968 March 27 | box 24 | folder 228 |

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| Montreal to Boston and New York: A Proposal for an Educational Communications Microwave Network - Gunn, Jr., Hartford N., 1967 April | box 55 | folder 537 |
| Population Office Activities, Fiscal 1969 - Harkavy, Oscar, 1970 January 15 | report 7820 box 34 | folder 342 |
| Some Dimensions of the Hungry, Crowded, Competitive World - Harkavy, Oscar, 1975 December 10 | box 62 | folder 618 |
| Ford Foundation Trustees' Site Visit to Baltimore - Hayes, Fred and Anthony Japha, 1978 June | report 4538 box 61 | folder 615 |
| Next Steps in Planning for the Foundation's Future - Heard, Alexander, 1976 September 24 | box 62 report 2633 | folder 619 |
| The Training Associate Program After Ten Years - Heffner, Jane E., 1971 April | box 24 | folder 228 |
| At the Cutting Edge: The Rise of the FAP (draft) - Hertz, Will, 1972 June | report 3495 box 39 | folder 397 |
| Program-Related Investments: Some Notes Regarding the Experience of the National Affairs Division (Discussion Paper) - Himes, James R., 1969 August | box 6 | folder 46 |
| Policy Studies: Blueprints for Progress - Or Social Security for Social Scientists - Howe II, Harold, 1974 May 6 | report 4012 box 9 | folder 74 |
| Education and Research Division Forward Planning for Officers' Meeting Discussion, August 13, 1974 - Howe II, Harold, 1974 July 30 | report 6636 box 9 | folder 74 |
| Environment for Change in Higher Education (from Planning for Higher Education) - Howe II, Harold, 1976 April | box 9 | folder 74 |
| The Ford Foundation International Division Conference - New Delhi, India, October 25-29, 1971 - International Division, 1971 October | box 35 report 9830 | folder 364 |
| The International Rice Research Institute Considers Its Role in the 1970s - International Rice Research Institute, 1969 July 11 | box 35 report 3781 | folder 357 |
| The Role of the Foundations in the Modern World - Jacqz, Jane W. - Conference of European and American Foundation Executives, 1969 May | box 34 | folder 344 |
| The Role and Social Responsibility of the Modern Corporation (memo) - Kelly, Eamon, 1976 October 28 | box 6 | folder 52 |
| Democratic Polity and How it Works, with Special Reference to the United States - Kelly, James A. and Kalman H. Silvert, 1975 December 15 | box 62 report 2195 | folder 618 |
| Trip Notes: December 15, 1974 - January 8, 1975 (Japan and Hong Kong) - Kennedy, Roger G., 1975 January | box 8 | folder 64 |

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| Contingent Repayment Loan Report - Kerstetter, Bert G. - Yale University, 1970 April | box 56 | folder 546 |
| An Approach to Foundation Programming in the Middle East (preliminary paper) - Kingsley, J. Donald, 1968 November 7 | box 34 report 3720 | folder 346 |
| Humanities and the Arts: Budget Projections - FY 1974-75 - Lowry, McNeil W., 1973 February 22 | box 21 | folder 198 |
| About the Ford Foundation - Magat, Richard, 1971 July 26 | box 8 | folder 68 |
| Report to Administrative Division: Trip to Asia and Middle East Offices - Mayer, Robert A., 1968 February 9 | box 3 | folder 19 |
| Task Force on Telecommunications: Subcommittee on the Impact of Telecommunications on Society - Mayer, Robert A., Kristin Anderson, Richard Kapp, and Alessandro Silj, 1973 August | box 44 report 5668 | folder 438 |
| Plan for Evaluation of Ford Foundation Assistance to Haile Selassie I University - Method, Francis J., 1972 July 31 | box 51 | folder 496 |
| Resource Allocation Study: Interpretations of Use of Grants vs. FAPs and New Actions - Miller, Frank, 1971 April 14 | box 44 | folder 436 |
| We Will Substitute a Hum: A Free Form Report of a Discussion on America's Values and Her Current Troubles - Miller, William Lee, 1974 March 6 | box 9 report 3498 | folder 74 |
| Foundation-Administered Projects (2nd draft) - Nagel, John S., 1971 August | report 11620 box 39 | folder 397 |
| Foundation-Administered Projects (draft of final report) - Nagel, John S., 1971 August | box 44 report 11620 | folder 437 |
| Cambridge Visit, March 9 and 10 (memo) - Nelson, Courtney A., 1970 March | box 34 | folder 344 |
| The Ford Foundation and Dependent Organizations Currently Active (preliminary draft) - Office of the President, 1968 May 25 | report 2708 box 47 | folder 466 |
| The Foundation-Administered Project: What and Why? - Office of the President, 1972 June | report 2839 box 39 | folder 397 |
| Long Overdue - Full Partnership for Women in American Society - Peterson, Esther, 1971 October 21 | report 1991 box 44 | folder 441 |
| Program Related Investments: Two Years Later - A Report on Progress and Problems in PRIA (Information Paper) - Program Related Investments, 1970 September | report 2129 box 36 | folder 377 |
| The International Urbanization Survey (draft) - Robin, John P., Colin Rosser, and Frederick C. Terzo, 1971 October | report 5838 box 35 | folder 364 |
| The Upper Division Scholarship Program: An Interim Report on the Pilot Program in Illinois and Michigan, 1970-1972 - Sabine, Gordon A., 1972 June | report 6933 box 9 | folder 76 |

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| Domestic Grants and FAPs - FY 1960-1970 - Selected Characteristics - Seessel, Thomas V., 1971 April 26 | box 38 | folder 395 |
| Dependent Organizations (draft) - Sheldon, Richard C., 1971 August | box 47 | folder 466 |
| Fundamental Design - Phase I: Architectural, Structural, Mechanical, Electrical - International Institute of Tropical Agriculture - Smith, Haines, Lundberg and Waehler Architects, 1966 October 7 | report 709 box 48 | folder 472 |
| The Role of Anthropology in a Western Nigeria Resettlement Project - Smock, David R., 1965 | report 4225 box 33 | folder 335 |
| South Africa: The Silver Linings are a Figment of Munger's Imaginations - Smock, David R., 1969 March | report 4194 box 34 | folder 344 |
| Cultural and Attitudinal Factors Affecting Agricultural Development in Eastern Nigeria - Smock, David R., 1969 October | box 33 | folder 335 |
| National Integration in West Africa - Smock, David R., 1971 September | report 3976 box 35 | folder 364 |
| Notes on East and Southeast Asia and India (memo) - Staples, Eugene S., 1969 September | report 9091 box 34 | folder 344 |
| A Note on Indonesia and Malaysia (memo) - Staples, Eugene S., 1969 November | report 9092 box 34 | folder 344 |
| Report on Asia and Pacific Activities in FY 1969 - Staples, Eugene S., 1970 January 31 | box 34 | folder 342 |
| The Foundation in India - Staples, Eugene S., 1978 June | report 3883 box 61 | folder 616 |
| Cable Television and the Ford Foundation: A Preliminary Analysis of New Foundation Participation in Media Development - Sucherman, Stuart F., 1970 September | report 4704 box 9 | folder 79 |
| Notes on a Visit to India - October 1968 - Sutton, Francis X., 1968 December | report 1152 box 34 | folder 344 |
| Reflections on a Visit in Japan, October 1968 - Sutton, Francis X., 1969 January | box 34 report 9080 | folder 344 |
| Research, Scholarship, and Cultural Development: Education Session - International Division Conference - Sutton, Francis X., 1971 September | box 35 report 9828 | folder 363 |
| Social Values and Culture in a Modern World - Sutton, Francis X., 1975 December 17 | box 62 report 3090 | folder 618 |
| National Affairs Program Strategy (memo) - Sviridoff, Mitchell, 1968 October 21 | box 36 | folder 366 |

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| New or Expanded Program Ideas for National Affairs' Planning Agenda - Sviridoff, Mitchell, 1972 February | report 2460 box 10 | folder 81 |
| Division of National Affairs: Budget Planning Paper, FY 1974-1975 - Sviridoff, Mitchell, 1973 February 16 | box 21 report 10978 | folder 197 |
| Report of the Office of European and International Affairs for Fiscal Year 1969 - Swearer, Howard R., 1970 January 19 | box 34 | folder 342 |
| A Time to Choose: Final Report of the Energy Policy Project - The Energy Policy Project, 1974 October 18 | report 6255 box 49 | folder 485 |
| Program-Related Investments: A Broader Use of Philanthropy (draft) - Tolles, Robert, 1974 June 12 | report 1985 box 8 | folder 70 |
| Report of the Twentieth Century Fund Task Force for a National Press Council - Twentieth Century Fund Task Force, 1972 July | box 9 | folder 79 |
| Trustees Project Papers on American Social and Political Organization - various staff members, 1976 October | box 62 | folder 620 |
| Trustees Project Papers on International Activities - various staff members, 1976 October | box 62 | folder 620 |
| Trustees Project Papers on the Condition of Human Beings - various staff members, 1976 October | box 62 | folder 620 |
| Trustees Project Papers on the Liberal Tradition and Other Concerns - various staff members, 1976 October | box 62 | folder 620 |
| Social Progress and the Liberal Arts - Ward, F. Champion, 1970 June 1 | box 9 | folder 75 |
| Assistance to Education in the Seventies: For Discussion in New Delhi, October 1971 - Ward, F. Champion, 1971 September | report 3974 box 35 | folder 363 |
| The Generalization and Spread of Knowledge and its Application to Change in Society - Ward, F. Champion and Peter de Janosi, 1975 December 10 | box 62 | folder 618 |
| Ford Foundation Assistance to Haile Selassie I University 1963-1973 - Ward, F. Champion, Fred Harrington, and Cranford Pratt, 1972 December | box 51 report 3676 | folder 497 |
| The Nature of the Individual and His or Her Fulfillment - Whiting, Basil and Terry Saario, 1975 December | box 62 | folder 618 |
| Job Satisfaction: Reflections on a European Reconnaissance - Whiting, Basil J., 1972 July 26 | box 10 | folder 81 |
| Office for Latin America and the Caribbean, Report on 1969 - Wilhelm, Harry E., 1970 January 10 | box 34 | folder 342 |
| United Nations International School (UNIS) - Brief Chronological Summary Background and Ford Foundation Involvement, 1968 June 12 | box 56 | folder 543 |

Notes on the International Institute of Tropical Agriculture (draft),
1969 February 28

box 48

folder 473

Appendix C: Budget Reports Removed from Collection

Processing Information:

Processing Information

Budget reports have not been assigned a report number, and are not described in the Ford Foundation LINKS database.

Separated Materials:

Separated Materials

The following reports have been removed from the collection and can be found in the Budget Records. The reports are listed chronologically.

| Title/Description | Instances |
|---|------------------|
| Five Year Financial Projections, 1968 June | report - |
| Humanities and the Arts – Proposed Budget, Fiscal Year 1969, 1968 June | report - |
| International Division – Proposed Budget, Fiscal Year 1969, 1968 June | report - |
| National Affairs Division – Proposed Budget, Fiscal Year 1969, 1968 June | report - |
| Office of Public Broadcasting – Proposed Budget, Fiscal Year 1969, 1968 June | report - |
| Management Costs, 1968 September | report - |
| Proposed Budget: Fiscal Year 1970 – Management Costs, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – Summary, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – Humanities and the Arts Division, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – Education and Research Division, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – Program-Related Investments, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – International Division, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – Division of National Affairs, 1969 June | report - |
| Proposed Budget: Fiscal Year 1970 – Office of Public Broadcasting, 1969 June | report - |

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| Proposed Budget: Fiscal Year 1970 – Five-Year Financial Projections, 1969 June | report - |
| Proposed Budget – Fiscal Year 1971, 1970 June | report - |
| Proposed Budget – Fiscal Year 1972, 1971 June | report - |
| Proposed Budget – Fiscal Year 1973, 1972 June | report - |
| Proposed Budget – Fiscal Years 1974 and 1975, 1973 June | report - |
| Proposed Budget: Fiscal Year 1974 – Management Costs, 1973 September | report - |
| Proposed Revisions in 1975 Program Budget and Preliminary Presentations of 2-Year Program Budgets for FY 1976 and 1977, 1975 March | report - |
| Proposed Budget – Fiscal Years 1976 and 1977, 1975 June | report - |
| Management Costs – Proposed Budget – Fiscal Year 1976, 1975 September | report - |
| Management Costs – Proposed Budget – Fiscal Year 1977, 1976 September | report - |

Appendix D: Board of Trustees, Executive Committee, and Finance Committee Papers Removed from Collection

Appendix D: Board of Trustees, Executive Committee, and Finance Committee Papers:

Appendix D: Board of Trustees, Executive Committee, and Finance Committee Papers

BOARD OF TRUSTEES Note: Agendas, Minutes, and Dockets for the following meeting dates have been removed from the collection and can be found in the Board of Trustees Records. However, some folders in the collection still contain Agendas and Minutes; only those Agendas and Minutes that were already filed with the Dockets in the Board of Trustees Records have been removed from the collection.

March 1972 June 1972 September 1972 December 1972 March 29-30, 1973 June 28-29, 1973 September 1973 December 1973 March 1974 June 1974 September 1974 December 1974 March 1975 June 1975 September 1975 December 1975 March 1976 June 1976 September 1976 December 1976 March 24-25, 1977 June 23-24, 1977 September 29-30, 1977 December 7-8, 1977 March 30-31, 1978 June 29-30, 1978 October 5-6, 1978 December 7-8, 1978

EXECUTIVE COMMITTEE Note: Minutes for the following meeting dates have been removed from the collection and can be found in the Executive Committee Records.

February 24, 1970 May 28, 1970 November 6, 1970 February 2, 1971 April 30, 1971 November 16, 1971 February 23, 1972 October 18, 1972 December 8, 1972 February 7, 1973 October 31, 1973 February 6, 1974 October 30, 1974 February 26, 1975 May 22, 1975 October 29, 1975 February 27, 1976 November 3, 1976 February 16, 1977 May 23, 1977

FINANCE COMMITTEE Note: Minutes, Treasurer's Reports, and Financial Reports for the following meeting dates have been removed from the collection and can be found in the Finance Committee Records.

March 26, 1969 March 24, 1971 June 23, 1971 September 22, 1971 December 9, 1971 March 29, 1972 June 28, 1972 September 27, 1972 December 8, 1972 March 28, 1973 June 27, 1973 September 24, 1973 December 13, 1973 March 27, 1974 June 26, 1974 September 26, 1974 December 12, 1974 March 25, 1975 June 26, 1975 September 24, 1975 December 11, 1975 February 27, 1976 March 24, 1976 September 22, 1976 December 9, 1976 March 23,

1977 December 7, 1977 March 29, 1978 June 1978 October 5-6, 1978 December 6, 1978 March 28, 1979 June 27, 1979

Appendix E: Program-Related Investments Removed from Collection

Appendix E: Program-Related Investments:

Appendix E: Program-Related Investments

Note: The following companies are recipients of program-related investments. Folders containing information on these PRIs have been removed from the collection. Information on these PRIs was originally located within the Closed Grant File Room at Ford Foundation.

Acadian Delight ACTION All Pro Chicken, Inc. Cable TV – Broadcasting Center for Understanding Media, Inc. Cheetah Tours Coalition Venture Corporation Community Progress, Inc. Congaree Iron and Steel Cooperative Services, Inc. Daily Made (Ship Shape) Detroit Educational Television Foundation East Central Catfish Ebony Development Corporation Educational Broadcasting Corporation WNET/Ch. 13 Federation of Southern Cooperatives Feedinco First Harlem Securities Corporation Fort Lincoln Development Corporation Freedom Enterprises Funds for Self Enterprise (Cincinnati Business Assistance and Determined Young Men) The Growing Mind Harvard Community Health Plan India (Bombay) Soybean Processing Plant Jefferson County Improvement Corporation Mecco Enterprises, Inc. MESBIC (Minority Enterprise Small Business Investment Companies) Mobilization for Youth Mortgage Opportunities, Inc. National Council on Crime and Delinquency National Housing Partnership The Nature Conservancy New Breed Industries North Milwaukee State Bank Our Markets, Inc. Progress Enterprises (Zion Enterprises) Rhode Island Group Health Association The Salk Institute Shaw University The Third Press Vic-Way Broadcasting Corporation W.V.B. Corporation Yale College

Appendix F: Legal Consultants Removed from Collection

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Appendix F: Legal Consultants

Note: The following lists the legal consultants used by the Foundation. Some of these firms can still be found within the collection, primarily in the form of correspondence or consultant reports. Evidence of the usage of other firms has been wholly removed from the collection because the materials were non-archival. The following is a complete list of all legal consultants that were, at one point, present in Trottenberg's collection.

Alzheimer and Gray Cravath, Swaine, and Moore Debevoise, Plimpton, Lyons, and Gates Ferguson and Capron Ginsburg, Feldman, and Bress Hill, Lewis, Adams, Goodrich, and Tait McCoy, Weaver, Wiggins, Cleveland, and Raper Morgan, Lewis, and Bockius Patterson, Belknap, and Webb Pillsbury, Madison, and Sutro Shearman and Sterling