

Foundation Center of New York records

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Rockefeller Archive Center

15 Dayton Avenue Sleepy Hollow 10591

archive@rockarch.org

URL: http://www.rockarch.org

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Summary Information

Repository: Rockefeller Archive Center

Creator - ctb: Buckman, Thomas R.

Creator - ctb: Lewis, Marianna O.

Creator - ctb: Andrews, Frank Emerson

Creator - ctb: Pattillo, Manning M.

Creator - ctb: Kirsch, William

Creator: Foundation Library Center

Creator: Foundation Center

Title: Foundation Center of New York records

ID: FA023

Date [inclusive]: 1922-2004 (bulk 1954-1994)

Date [bulk]: bulk

Physical Description: 65 Cubic Feet 173 microfilm reels

Language of the English

Material:

Preferred Citation

Information regarding the Rockefeller Archive Center's preferred elements and forms of citation can be found at http://www.rockarch.org/research/citations.php

Biographical/Historical note

The Foundation Center was created in 1956 by foundation leaders who felt the need for an independent organization that would collect and make available information about philanthropic and non-profit organizations in the United States and throughout the world. On May 25, 1956, the Foundation Library Center was incorporated as an educational institution under the authority of the New York State Board of Regents. The Center was to gather comprehensive information about foundations, stimulate reporting

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and accountability where it did not yet exist, and provide "a convenient place where any person may find accurate information about foundations."

F. Emerson Andrews, long-time president of the Russell Sage Foundation, was the first president of the Foundation Center, serving from 1956-1966. He wrote extensively on the topic of philanthropic and non-profit organizations and was a strong advocate for a central information-collecting agency. He was succeeded by Manning M. Pattillo (1967-1970), Thomas R. Buckman (1971-1991), and Sara Engelhardt (1992-2008).

The books, reports, and files of the Russell Sage Foundation formed a core collection of the Foundation Library Center. The Center also purchased photographic transcripts of financial and other data on approximately 7,000 organizations, and it solicited complete annual reports files where they existed. The library opened to the public in late 1956. In 1960, the Center published its first Foundation Directory.

In 1968, the Foundation Library Center changed its name to the Foundation Center. For further information see its website, http://foundationcenter.org, and its publication "Philanthropy in the 21st Century: The Foundation Center's 50th Anniversary Interviews."

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Scope and Contents note

The records of the Foundation Center span the years 1922-2004, with the majority of the records dating from the mid-1950s, when the Center was created, to the early 1990s. Most of the material prior to 1956 comes from F. Emerson Andrews, the first president of the Foundation Center. Prior to 1956, Andrews had worked at the Russell Sage Foundation, and much of the correspondence relating to the Foundation Center was addressed to him there.

Containing correspondence, annual reports, financial records, publications, clippings, and a large collection of organizational pamphlets, the collection reveals the history of the Foundation Center and its projects, including fund-raising programs, the directories, "Foundation News," and various seminars in technology and other areas of interest. It also provides a history of governmental influence and tax reform in relation to non-profit organizations. The collection contains manuscripts and articles by F. Emerson Andrews on the world of philanthropic organizations, including his book "The Foundation Watcher." It also includes photographs, a Foundation Center video entitled "Foundations: The People and The Money," a scrapbook containing articles on the Congressional tax reform hearings, and transcripts from these hearings.

The Foundation Center collection exists on 173 reels of 35mm preservation standard microfilm.

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Arrangement note

The records are divided into three series:

Series 1 - Administrative Files (1922-2004)

Series 2 - Program and Project Files (1924-1999)

Series 3 - Non-Related Foundation Center Files (1947-1990)

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File Plan note

Former Classification: XVII

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Administrative Information

Publication Statement

Rockefeller Archive Center

15 Dayton Avenue Sleepy Hollow 10591 archive@rockarch.org

URL: http://www.rockarch.org

Revision Description

Migrated from Re:discovery to the AT by Marisa Hudspeth. 5/29/2009

Conditions Governing Access

Open for scholarly research without restriction.

RAC is unable to provide access to obsolete media and original digital media. In addition separated media may not yet have undergone stabilization procedures. When feasible, a digital surrogate may

be created via special order. All applicable charges will apply. See RAC Head of Archival Services or RAC Head of Digital Programs for details.

Conditions Governing Use

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Appraisal

With the exception of separated published and special format material, the archival material has been reformatted and the original records are no longer available. User copies of the microfilm are available for scholarly access.

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Related Materials

Separated Materials

Published material that is readily available elsewhere (such as books or transcripts of Congressional hearings) and special format material, including audio and visual materials and computer disks and punch cards, have been separated and retained in their original formats. "Separation sheets" placed within the microfilmed collection will note the existence of this original documentation.

Separated Materials

The following books were removed from the Foundation Center collection and placed in the Rockefeller Archive Center library. They are available for research use.

Andrews, F. Emerson. Foundation watcher. Lancaster, PA: Franklin and Marshall College, 1973. Copy 2: Inscribed by author; autographed. Call Number: 361.7 AND.

America's voluntary spirit: a book of readings. Ed. Brian O'Connell. New York: Foundation Center, 1983. Call Number: 361.7 ROC.

An agile servant: community leadership by community foundations. Ed. Richard Magat. New York: Council on Foundations, 1989. Call Number: 361.8 AGI.

Zurcher, Arnold J., and Dustin, Jane. The foundation administrator: a study of those who manage America's foundations. New York: Russell Sage Foundation, 1972. Call Number: 361.7068 ZUR.

Duane, Thomas David. Opthalmic research: U. S. A.: a comprehensive national survey of eye research. New York: Research to Prevent Blindness, 1965. Call Number: 612.8 DUA.

Layton, Daphne Niobe. Philanthropy and voluntarism: an annotated bibliography. New York: Foundation Center, 1987. Call Number: 361.7016 LAY.

Kiger, Joseph C. Historiographic review of foundation literature: motivations and perceptions. New York: Foundation Center, 1987. Call Number: 361.7016 KIG.

The literature of the nonprofit sector: a bibliography with abstracts. New York: Foundation Center, 1989-1994. Call Number: 361.7016 LIT.

The foundation directory. Ed. David G. Jacobs. New York: Foundation Center, 2003. Call Number: 2nd Floor/361.7025 FOU.

Foundation Center. Annual report. New York, 1956-2007. (Variant Title, 1956-1967: Foundation Library Center annual report.) Call Number: 2nd Floor, Annual Reports.

Foundation Center. Foundation Center: 50th anniversary: knowledge to build on. New York, 2006. Call Number: 361.706 FOU.

Philanthropy in the 21st century. Ed. Mitch Nauffts. New York: Foundation Center, 2007. Call Number: 361,706 PHI.

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Controlled Access Headings

- Taxation -- Law and legislation -- United States
- Philanthropy
- Philanthropy, Charity and the Nonprofit Sector
- Charities
- Charitable uses, trusts, and foundations
- Buckman, Thomas R.
- Lewis, Marianna O.
- Russell Sage Foundation
- Andrews, Frank Emerson
- Pattillo, Manning M.
- Kirsch, William
- Foundation Library Center
- Foundation Center

Physical Characteristics and Technical Requirements

With the exception of separated published and special format material, the archival material has been reformatted and the original records are no longer available. User copies of the microfilm are available for scholarly access.

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Physical Characteristics and Technical Requirements

Materials requiring specialized equipment for access (audio, video, slides, computer disks) may be closed to research dependent on availability of the applicable equipment.

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Physical Characteristics and Technical Requirements

Brittle or damaged items, or materials otherwise in need of preservation care, may be closed to researchers at the discretion of the RAC Head of Archival Services/Head of Reference.

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Collection Inventory

Administrative Files, 1922-2004

Arrangement note

This series is arranged in two subseries:

Subseries 1 - Historical Information

Subseries 2 - Officer and Committee Files

Historical Information, 1956-2004

Scope and Contents note

This series contains historical information about The Foundation Center, including staff charts.

| Title/Description | Instances | |
|---|-----------|-----------|
| The Foundation Center, 1956-1966 | reel 1 | frame 3 |
| The Foundation Center, 1956-1971 | reel 1 | frame 58 |
| The Foundation Center, 1990-1993 | reel 1 | frame 338 |
| The Foundation Center - Annual Reports, 1956-2004 | reel 1 | frame 383 |
| The Foundation Center - 30th Anniversary, November 21, 1986 | reel 1 | frame 385 |
| Personnel and Organizational Chart, 1967-1968 | reel 1 | frame 422 |

Officer and Committee Files, 1922-1998

Arrangement note

Series 1.2 is arranged in two sections:

A - Officer Files

B - Committee Files

Title/Description Instances

Officer Files, 1922-1998

Arrangement note

Subseries A is arranged in 9 parts:

- 1 F. Emerson Andrews
- 2 F. Emerson Andrews and Manning M. Pattillo, Jr.
- 3 Manning M. Pattillo, Jr.
- 4 Manning M. Pattillo, Jr. and Thomas R. Buckman
- 5 Thomas R. Buckman
- 6 William Kirsch
- 7 Marianna O. Lewis
- 8 Nathaniel Spear III
- 9 Trustees (Deceased)

Title/Description Instances

F. Emerson Andrews, 1922-1991

Scope and Contents note

F. Emerson Andrews served as the first president of The Foundation Center, 1956-1966. Before his time at The Foundation Center, he was president of the Russell Sage Foundation. He was very interested in and studied philanthropic foundations. His papers consist of correspondence, manuscripts and other published works, and material relating to the Jellicoe Foundation. The Jellicoe Foundation was a fictitious foundation created by Andrews to see if other publishing houses were copying from The Foundation Directory. If Jellicoe Foundation was in the other directory he knew they copied directly and without The Foundation Center's permission.

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| American Cancer Society, Inc., 1947-1958 | reel 1 | frame 435 |
| American Council on Education, 1945-1967 | reel 1 | frame 468 |
| American Foundations Information Service, 1945-1959 | reel 1 | frame 576 |
| American Foundations Information Service - Purchasing Documents, 1956 | reel 2 | frame 1 |
| American Historical Society and American Society of Church History - Joint Meeting, December 1961, 1961 | reel 2 | frame 30 |
| The American National Red Cross, 1948-1962 | reel 2 | frame 55 |
| American Philosophical Society - Project on Foundations, 1959-1963 | reel 2 | frame 134 |
| American Society of Corporate Secretaries, 1950-1956 | reel 2 | frame 225 |
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| Association for the Aid of Crippled Children, 1953-1965 | reel 2 | frame 438 |
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| Code of Practice, 1964 | reel 2 | frame 671 |
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| Correspondence, 1950-1969 | reel 3 | frame 307 |
| Correspondence, 1970-1978 | reel 3 | frame 544 |
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| Merle Curti, 1957-1967 | reel 4 | frame 256 |
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| Depository Libraries - Atlanta, Georgia, 1960-1969 | reel 4 | frame 590 |
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| Depository Libraries - Center for Research Libraries, 1958-1965 | reel 5 | frame 70 |
| Depository Libraries - Chicago, Illinois, 1965-1969 | reel 5 | frame 191 |
| Depository Libraries - Cleveland, Ohio, 1960-1969 | reel 5 | frame 257 |
| Depository Libraries - Kansas City, Missouri, 1959-1969 | reel 5 | frame 295 |
| Depository Libraries - Los Angeles, California, 1961-1969 | reel 5 | frame 395 |
| Depository Libraries - Miscellaneous, 1959-1971 | reel 5 | frame 467 |
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| Harry Emerson Fosdick - Centennial Year, 1978 | reel 6 | frame 20 |
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F. Emerson Andrews and Manning M. Pattillo, Jr., 1945-1972

| Title/Description | Instances | |
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Scope and Contents note

Punch cards.

Existence and Location of Copies note:

Existence and Location of Copies note

See also Reel 25, Frame 0340.

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Manning M. Pattillo, Jr., 1951-1975

Scope and Contents note

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Manning M. Pattillo, Jr. and Thomas R. Buckman, 1971-1976

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Scope and Contents note

Thomas R. Buckman was the third president of The Foundation Center, 1971-1991.

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Existence and Location of Copies note:

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Library Planning - Microforms, 1971

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Poor Copies - Experiment

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Existence and Location of Copies note:

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William Kirsch, 1971-1993

Scope and Contents note

William Kirsch served as Treasurer of The Foundation Center from 1972-1990.

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Marianna O. Lewis, 1945-1982

Scope and Contents note

Marianna O. Lewis was the first editor of the Foundation Directory (1957-1971). She then became senior research associate (1972-1982) and assistant secretary in 1974.

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Nathaniel Spear III, 1969-1974

Scope and Contents note

Nathaniel Spear III worked as the international specialist (1969-1974) for The Foundation Center.

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Trustees (Deceased), 1955-1998

Scope and Contents note

Series 1.2A.9 is labeled "Deceased Trustees." At the time of filming many of these Trustees were not yet deceased. The material was originally labeled in this way because many of the trustees had passed away; but several of the trustees mentioned (such as Vernon Jordan) were placed in the category of "deceased" after declining to accept a Trustee Emeritus position with the Center.

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Committee Files, 1967-1994

Scope and Contents note

This series contains correspondence, minutes, and agenda of various large committees in The Foundation Center: the Board of Trustees, the Executive Committee, and the Finance and Audit Committee.

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Programs, 1924-1998

Arrangement note

Series 2.1 is arranged in 6 sections:

- A Associates Program Files
- B Donor Files
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- F Sponsors

Scope and Contents note

Information in Series 2.1 is primarily centered around financial material and fund-raising that The Foundation Center actively pursued.

Title/Description Instances

Associates Program Files, 1975-1997

Scope and Contents note

The Associates Program is a fee-based program. Being a member of the Associates Program gave an organization the opportunity to use the resources of The Foundation Center for a small fee on top of the yearly fee. A primary benefit of membership was the ability to draw on the vast database The Foundation Center maintained.

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Donor Files, 1970-1998

Arrangement note

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Arrangement note

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- 1 Bibliographies
- 2 The Foundation Library Center
- 3 The Foundation Library Center, The New York Library
- 4 The Foundation Library Center, Regional Libraries and Cooperating Collections
- 5 Grant Classification Scheme (NTEE-National Taxonomy of Exempt Entities)
- 6 Major Gift Campaign
- 7 Public Services Seminars
- 8 Source Book Profiles

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This series contains files pertaining to the major programs that were promoted.

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Program and Project Files - Programs - Programs - The Foundation Library Center, Regional Libraries and Cooperating Collections, 1972-1998

Scope and Contents note

This series contains information about the cooperating collections that can be found in the Foundation Library Center's regional libraries based in Cleveland, San Francisco, and Washington, D.C. and in libraries, community foundations, and other non-profit resource centers. These centers provide a core collection of The Foundation Center's publications.

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Scope and Contents note

(4 x 6)" color photograph of Susan Pinsley, Superintendent; Plattsburgh Public Library

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Existence and Location of Copies note

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Program and Project Files - Programs - Programs - Grant Classification Scheme (NTEE-National Taxonomy of Exempt Entities), 1985-1994

Scope and Contents note

This series contains files relating to a grants reporting system that enabled grant-seekers and grant-makers to identify grants in specific fields of interest. The system was based on a classification system using a national standard for classifying non-profit organizations.

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Program and Project Files - Programs - Programs - Major Gift Campaign, 1979-1991

Scope and Contents note

This series describes a large fund-raising campaign that was to raise \$7.5 million for a 5 year program to build the Foundation Center's capacities to meet the growing information needs in the field of private philanthropy, primarily in the area of technology.

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Scope and Contents note

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Sponsors, 1972-1985

Scope and Contents note

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Special Projects, 1965-1999

Arrangement note

Series 2.2 is arranged in 5 sections:

- A Fellows
- B Film/Video Project
- C Fund-Raising
- D Speeches
- E Technology Information Service (TIS)

Scope and Contents note

This series contains material on limited projects that The Foundation Center embarked on.

| Title/Description | Instances |
|-------------------|-----------|
|-------------------|-----------|

Fellows, 1965-1995

Scope and Contents note

This series contains material on fellows who were part of The Foundation Center and other organizations.

| Title/Description | Instances | |
|---|-----------|------------|
| Richard Magat - Visiting Fellow, 1965-1995 | reel 155 | frame 812 |
| The Rockefeller Foundation - Warren Weaver Fellows, 1992-1993 | reel 155 | frame 1095 |

Film/Video Project, 1982-1993

Scope and Contents note

This series contains the files, photographs, and the video of the film/video project that The Foundation Center made about the workings of non-profit organizations.

Related Archival Materials note:

Related Archival Materials note

See also Box 1, Folders 8-10, for photographs.

| /Description | Instances | |
|--|-----------|-----------|
| Publicity and Reviews, 1986-1989 | box 1 | folder 8 |
| Scope and Contents note | | |
| (8x10)" black and white photographs: Foundations: The People and the Money; Albert Maysles and Susan Froemke of Maysles Films; Albert Maysles and David Maysles. | | |
| Existence and Location of Copies note: Existence and Location of Copies note | | |
| See also Reel 157, Frame 0337. | | |
| Photographs and Negatives, 1987 | box 1 | folder 8A |
| Scope and Contents note | | |
| Photographs; Contact Sheets, black and white. | | |
| Existence and Location of Copies note: Existence and Location of Copies note | | |
| See also Reels 156-157. | | |
| Photographs and Negatives, 1987 | box 1 | folder 9 |
| Scope and Contents note | | |
| Negatives | | |
| Existence and Location of Copies note: Existence and Location of Copies note | | |
| See also Reels 156-157. | | |
| Photographs and Negatives, 1987 | box 1 | folder 10 |
| Scope and Contents note | | |
| Negatives | | |
| Existence and Location of Copies note: Existence and Location of Copies note | | |
| See also Reels 156-157. | | |
| Film Distribution and Publicity, 1985-1993 | reel 156 | frame 2 |
| Fund-Raising, 1985-1989 | reel 156 | frame 207 |

| General, 1984-1987 | reel 156 | frame 380 |
|---|----------|------------|
| General, 1988-1997 | reel 156 | frame 561 |
| Grants Transcriptions - Reel 1-31, 1987 | reel 156 | frame 705 |
| Rockefeller Gentlemen - David, Sr. and David, Jr Reel 1, n.d. | reel 156 | frame 706 |
| Shakely with Los Angeles AIDS Project, n.d. | reel 156 | frame 741 |
| Shakely Interview, n.d. | reel 156 | frame 764 |
| Bob Beech Interview - Reel 30, n.d. | reel 156 | frame 799 |
| Grants Transcriptions - Reel 33-40, 1987 | reel 156 | frame 835 |
| Partial Land Stewardship - Reel 33, n.d. | reel 156 | frame 846 |
| Maysles Film, Inc Contract and Correspondence, 1986-1988 | reel 156 | frame 965 |
| Media Coverage, 1987-1988 | reel 156 | frame 1059 |
| PBS Broadcast, 1987-1991 | reel 156 | frame 1098 |
| Premieres, 1987 | reel 157 | frame 1 |
| Premieres - Cleveland, November 13, 1987 | reel 157 | frame 119 |
| Premieres - Minneapolis, November 20, 1987 | reel 157 | frame 134 |
| Premieres - New York, November 10, 1987 | reel 157 | frame 178 |
| Premieres - San Francisco, November 12, 1987 | reel 157 | frame 247 |
| Premieres - Washington, D. C., November 24, 1987 | reel 157 | frame 287 |
| Promotional Folder - South Carolina, 1988-1990 | reel 157 | frame 320 |
| Publicity and Reviews, 1986-1989 | reel 157 | frame 337 |
| Separated Materials: Separated Materials See also Box 1, Folder 8, for photographs. | | |
| Requests for Proposals, 1984-1986 | reel 157 | frame 442 |
| Steering Committee - Meetings and Minutes, 1984-1991 | reel 157 | frame 555 |
| Steering Committee - Membership, 1984-1989 | reel 157 | frame 730 |
| Videotape - "Foundations: The People and The Money", October 3, 1988 | reel 157 | frame 812 |

Scope and Contents note

This series consists of files pertaining to the fund-raising for various special projects.

| /Description | Instances | |
|---|-----------|------------|
| Correspondence with Funders, 1985-1990 | reel 157 | frame 815 |
| Facelift Project, 1994-1995 | reel 157 | frame 1006 |
| Film/Video Project - Fund-Raising, 1984-1988 | reel 158 | frame 1 |
| Film/Video Project - Funding, 1985-1990 | reel 158 | frame 151 |
| Film/Video Project - Report, 1988 | reel 158 | frame 210 |
| Film/Video Project - Report to Funders and Renewal Campaign, 1987-1991 | reel 158 | frame 226 |
| Film/Video Proposals to Funders, 1986 | reel 158 | frame 337 |
| Grants Classification System (NTEE-National Taxonomy of Exempt Entities) Budget, 1989-1991 | reel 158 | frame 346 |
| Grants Classification System (NTEE-National Taxonomy of Exempt Entities) Funding, 1987-1996 | reel 158 | frame 363 |
| Grants Classification System (NTEE-National Taxonomy of Exempt Entities) Proposal, 1982 | reel 158 | frame 486 |
| Grants Classification System (NTEE-National Taxonomy of Exempt Entities) Requests, 1991 | reel 158 | frame 558 |
| Grants Classification System (NTEE-National Taxonomy of Exempt Entities) Special Project, 1988-1991 | reel 158 | frame 566 |
| Major Gift Campaign, 1986-1988 | reel 158 | frame 644 |
| Major Gift Campaign, 1986-1992 | reel 158 | frame 964 |
| Major Gift Campaign - Reports, 1988-1992 | reel 159 | frame 1 |
| Miscellaneous, 1980-1981 | reel 159 | frame 135 |
| Program Related Investments Project, 1993-1996 | reel 159 | frame 163 |
| Relocation of New York City Office, 1983-1986 | reel 159 | frame 197 |
| Technology Information Service, 1982 | reel 159 | frame 350 |
| Technology Information Service - Proposal, Reports, Newsletters, 1981-1983 | reel 159 | frame 431 |
| Washington, D. C. Expansion, 1989 | reel 159 | frame 507 |

Speeches, 1979-1999

Scope and Contents note

This series contains a list of speeches from members of The Foundation Center.

| Title/Description | Instances | |
|--|-----------|-----------|
| Miscellaneous Speeches, 1979-1993 | reel 159 | frame 523 |
| Speeches and Presentations List, 1989 | reel 159 | frame 565 |
| Speeches - Sarah Collins, 1992-1998 | reel 159 | frame 574 |
| Speeches - Sara L. Engelhardt, 1988-1999 | reel 159 | frame 601 |
| Speeches - Richard Magat, 1988-1990 | reel 159 | frame 767 |
| Speeches - Loren Renz, 1989-1993 | reel 159 | frame 824 |

Technology Information Service (TIS), 1977-1983

Arrangement note

Series 2.2E is arranged in two parts:

1 - General 2 - Historical

Scope and Contents note

This series is about an experimental reference service to provide private, grantmaking foundations with information on office technology and automation.

| Title/Description | Instances | |
|--|-----------|------------|
| General | | |
| Title/Description | Instances | |
| Administrative Correspondence, 1979 | reel 159 | frame 902 |
| Brochure, n.d. | reel 159 | frame 910 |
| Correspondence, 1978-1982 | reel 159 | frame 927 |
| Federal Assistance Programs Retrieval System (FAPRS), 1981 | reel 159 | frame 1057 |
| Foundation Cooperative Meating, November 17, 1982, 1982 | reel 159 | frame 1059 |
| Information Survey, 1980 | reel 159 | frame 1076 |
| Memoranda, 1981-1983 | reel 159 | frame 1086 |
| Monthly Reports, 1980-1981 | reel 159 | frame 1098 |
| Possible Resources to Contact, 1979 | reel 159 | frame 1164 |
| Proposal, 1981-1982 | reel 160 | frame 1 |
| Proposals Promotion, 1979 | reel 160 | frame 85 |

Publications Listing, 1982

| | reel 160 | frame 114 |
|---|----------|-----------|
| Session Attendees - Council on Foundations Meeting, 1981 | reel 160 | frame 141 |
| Requests, 1980 | reel 160 | frame 144 |
| Requests, 1981 | reel 160 | frame 293 |
| Requests, 1982-1983 | reel 160 | frame 429 |
| Seminars, 1981-1982 | reel 160 | frame 456 |
| Seminar - Aspen, Colorado, November 16-17, 1981 | reel 160 | frame 468 |
| Seminar - Chicago, Illinois, October 10, 1982 | reel 160 | frame 578 |
| Seminar - Dallas, Texas, May 28, 1980 | reel 160 | frame 625 |
| Seminar - Evaluations, 1980-1981 | reel 160 | frame 628 |
| Seminar - New York, New York, October 2, 1980 | reel 160 | frame 679 |
| Seminar - New York, New York - Names of Attendees, October 2, 1980 | reel 160 | frame 839 |
| Seminar - New York, New York, May 21, 1982 | reel 160 | frame 893 |
| Seminar - San Francisco, California, March 11, 1981 | reel 160 | frame 920 |
| Seminar - San Francisco, California, December 10, 1982 | reel 160 | frame 983 |
| Speakers for Future Seminars, 1980 | reel 160 | frame 991 |
| | | |

Historical, 1977-1982

Scope and Contents note

Series 2.2E.1 is about the history of office technology that has affected non-profit organizations. Files include brochures, surveys, and manuals on the emergence of office equipment and software.

| Citle/Description | Instances | |
|--|-----------|-----------|
| 1st Annual Foundation Survey Questionnaire, 1979 | reel 161 | frame 2 |
| Results of the 1st Annual Foundation Survey Questionnaire, 1979 | reel 161 | frame 452 |
| 2nd Annual Foundation Survey Questionnaire, 1980 | reel 161 | frame 527 |
| Results of the 2nd Annual Foundation Survey Questionnaire, 1980 | reel 161 | frame 994 |
| 3rd Annual Foundation Survey Questionnaire, 1981 | reel 162 | frame 1 |
| Results of the 3rd Annual Foundation Survey Questionnaire, 1981 | reel 162 | frame 415 |
| Drafts of the 4th Annual Foundation Survey Questionnaire, 1982 | reel 162 | frame 425 |
| 4th Annual Foundation Survey Questionnaire, 1982 | reel 162 | frame 453 |

| Survey Notes and Drafts of the 4th Annual Foundation Survey Questionnaire, 1982 | reel 163 | frame 1 |
|---|----------|-----------|
| Data Processing/Word Processing - Getting Started and Selecting a System, 1978-1982 | reel 163 | frame 154 |
| Information Unlimited Software, Inc EasyMailer, 1981 | reel 163 | frame 419 |
| Jabeth Enterprises, Inc., 1980 | reel 163 | frame 424 |
| Lockheed Martin - DIALOG, 1980-1982 | reel 163 | frame 427 |
| Lockheed Martin - DIALOG Manuals, 1979-1980 | reel 163 | frame 506 |
| Lockheed Martin - Searching DIALOG, 1977-1981 | reel 163 | frame 669 |
| Micrographics, 1980-1982 | reel 163 | frame 768 |
| Micronet, Inc The Paperless Office, 1981 | reel 163 | frame 827 |
| Modems, 1981 | reel 163 | frame 836 |
| The New York Times - Information Bank-II, 1981 | reel 163 | frame 840 |
| Non-Foundation Center Survey, 1982 | reel 163 | frame 861 |
| The Notepad System - Instructions, 1980 | reel 163 | frame 869 |
| Optical Character Recognition (OCR) - Equipment, 1980 | reel 163 | frame 921 |
| The Office Center - Saddle Brook, New Jersey, 1980 | reel 163 | frame 933 |
| Public Interest Clearinghouse, Inc., 1981 | reel 163 | frame 935 |
| Reprint Permission Letters, 1980 | reel 163 | frame 939 |
| Savin Corporation, 1979 | reel 163 | frame 954 |
| The Source - Electronic Mail, 1982 | reel 163 | frame 959 |
| Supplements for the DATAPRO Directory of Microcomputer Software, 1981-1982 | reel 164 | frame 1 |
| Terminals, 1980-1981 | reel 164 | frame 144 |
| Tymshare, 1980 | reel 164 | frame 178 |
| User Ratings - Mainframes, 1981 | reel 164 | frame 203 |
| User Ratings - Microcomputers, 1979-1981 | reel 164 | frame 214 |
| User Ratings - Minicomputers, 1980-1981 | reel 164 | frame 223 |
| Wang Laboratories, Inc., 1980-1981 | reel 164 | frame 269 |
| Thomas Wilds Associates, Inc., 1979-1981 | reel 164 | frame 340 |
| Women in Data Processing, Inc., 1981 | reel 164 | frame 365 |
| | | |

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Non-Related Foundation Center Files, 1947-1990

Arrangement note

This series is arranged in two subseries:

Subseries 1 - Ralph L. Nelson Foundation Investment Study

Subseries 2 - Tax Reform Records

Scope and Contents note

This series pertains to all non-profit organizations and how they use their monies.

Ralph L. Nelson Foundation Investment Study, 1962-1985

Scope and Contents note

This series contains material on the study that Ralph L. Nelson did comparing the investment policies of a select group of foundations.

| Title/Description | Instances | |
|--|-----------|------------|
| F. Emerson Andrews Correspondence, 1962-1967 | reel 164 | frame 384 |
| Company-Sponsored Foundations - First Draft of Chapter, n.d. | reel 164 | frame 459 |
| Cover Letters for Questionnaire, 1963-1966 | reel 164 | frame 504 |
| The Investment Policies of Foundations, July 1965 | reel 164 | frame 862 |
| Investment Policy Questionnaire, 1962-1963 | reel 164 | frame 1075 |
| Large Endowed Foundations - Investment Policies and Practices - First Draft of Chapter, n.d. | reel 165 | frame 1 |
| Manuscript - "The Economic History of Philanthropic Foundations in the United States in the Past Quarter Century: Creation, Growth and Turnover" - Revised First Draft, 1985 | reel 165 | frame 70 |
| Printing Instructions for Investment Study, 1965 | reel 165 | frame 155 |
| The Vincent Astor Foundation, 1963 | reel 165 | frame 196 |
| Avalon Foundation, 1962-1963 | reel 165 | frame 220 |
| Booth Ferris Foundation, 1963 | reel 165 | frame 252 |
| The Buhl Foundation, 1963 | reel 165 | frame 290 |
| Carnegie Corporation of New York, 1963 | reel 165 | frame 307 |
| Carnegie Endowment for International Peace, 1963 | reel 165 | frame 312 |
| Carnegie Institution of Washington, 1963 | reel 165 | frame 324 |
| China Medical Board of New York, Inc., 1963 | reel 165 | frame 487 |
| The Commonwealth Fund, 1963 | reel 165 | frame 580 |

| The Charles A. Dana Foundation, Inc., 1963 | reel 165 | frame 597 |
|--|----------|------------|
| The Danforth Foundation, 1963 | reel 165 | frame 601 |
| The Donner Foundation, 1963 | reel 165 | frame 707 |
| The Duke Endowment, 1962-1963 | reel 165 | frame 710 |
| The Field Foundation, Inc., 1963 | reel 165 | frame 753 |
| Max C. Fleischmann Foundation of Nevada, 1963 | reel 165 | frame 784 |
| The Ford Foundation, 1963-1964 | reel 165 | frame 1000 |
| The Solomon R. Guggenheim Foundation, 1963 | reel 166 | frame 1 |
| John A. Hartford Foundation, 1963 | reel 166 | frame 3 |
| Charles Hayden Foundation, 1963 | reel 166 | frame 9 |
| Howard Heinz Endowment, 1963 | reel 166 | frame 13 |
| Louis W. and Maud Hill Family Foundation, 1963 | reel 166 | frame 16 |
| Hoblitzelle Foundation, 1963 | reel 166 | frame 213 |
| Godfrey M. Hyams Trust, 1963 | reel 166 | frame 224 |
| James Foundation of New York, Inc., 1963 | reel 166 | frame 227 |
| The J. M. Kaplan Fund, Inc., 1963 | reel 166 | frame 236 |
| W. K. Kellogg Foundation, 1963 | reel 166 | frame 238 |
| Charles F. Kettering Foundation, 1963 | reel 166 | frame 313 |
| The Kresge Foundation, 1963 | reel 166 | frame 326 |
| Samuel H. Kress Foundation, 1963 | reel 166 | frame 415 |
| Kate Macy Ladd Fund, 1963 | reel 166 | frame 446 |
| Lilly Endowment, Inc., 1963 | reel 166 | frame 449 |
| Longwood Foundation, 1962-1963 | reel 166 | frame 453 |
| The John and Mary R. Markle Foundation, 1963 | reel 166 | frame 481 |
| The A. W. Mellon Educational and Charitable Trust, 1962-1963 | reel 166 | frame 487 |
| Richard King Mellon Foundation, 1963 | reel 166 | frame 511 |
| The Moody Foundation, 1963 | reel 166 | frame 537 |
| Charles Stewart Mott Foundation, 1963 | reel 166 | frame 540 |
| Old Dominion Foundation, 1963 | reel 166 | frame 553 |
| Olin Foundation, Inc., 1963 | reel 166 | frame 586 |
| Raskob Foundation for Catholic Activities, Inc., 1963 | reel 166 | frame 593 |
| Z. Smith Reynolds Foundation, 1963 | reel 166 | frame 597 |
| | | |

| Rockefeller Brothers Fund, 1963 | reel 166 | frame 687 |
|--|----------|-----------|
| The Rockefeller Foundation, 1963 | reel 166 | frame 827 |
| Russell Sage Foundation, 1962-1963 | reel 166 | frame 839 |
| Alfred P. Sloan Foundation, 1963-1964 | reel 167 | frame 1 |
| Seth Sprague Educational and Charitable Foundation, 1963 | reel 167 | frame 75 |
| Trexler Foundation, 1963 | reel 167 | frame 77 |
| Turrell Fund, 1963 | reel 167 | frame 115 |
| Victoria Foundation, Inc., 1963 | reel 167 | frame 121 |
| Amherst H. Wilder Foundation, 1963 | reel 167 | frame 156 |
| Winterthur Corporation, 1963 | reel 167 | frame 260 |

Tax Reform Records, 1947-1990

Arrangement note

Series 3.2 is arranged in three sections:

- A Cox and Reece Tax Committee Hearings
- B Tax Reform Act of 1969
- C Internal Revenue Service, Congressional Hearings from the 1970s-1990

Scope and Contents note

This series contains files of correspondence, newspaper clippings, a scrapbook, and IRS forms having to do with the changes in the tax system for non-profit organizations.

Title/Description Instances

Cox & Reece Tax Committee Hearings, 1947-1955

Scope and Contents note

Series 3.2A includes information about the first of the tax reforms that Congress enacted which affected non-profit organizations.

| Title/Description | Instances | | |
|--|-----------|-----------|--|
| F. Emerson Andrews - Testimony Before the Select Committee to Investigate Tax-Exempt Foundations and Comparable Organizations - House of Representatives, November 18, 1952, 1952 | reel 167 | frame 264 | |
| Congressional Questionnaire and Address List, 1952 | reel 167 | frame 407 | |
| Answers to Congressional Questionnaire - Carnegie Corporation of New York, 1952-1954 | reel 167 | frame 435 | |

| Answers to Congressional Questionnaire - Carnegie Foundation for the Advancement of Teaching, 1952 | reel 167 | frame 508 | |
|---|----------|-----------|--|
| Answers to Congressional Questionnaire - Carnegie Institution of Washington, 1952 | reel 167 | frame 561 | |
| Answers to Congressional Questionnaire - The Cleveland Foundation, 1952 | reel 167 | frame 696 | |
| Answers to Congressional Questionnaire - The Field Foundation, Inc., 1952 | reel 167 | frame 734 | |
| Answers to Congressional Questionnaire - General Education Board, 1952 | reel 167 | frame 807 | |
| Answers to Congressional Questionnaire - John Simon Guggenheim Memorial Foundation, 1952 | reel 167 | frame 946 | |
| Answers to Congressional Questionnaire - Louis W. and Maud Hill Family Foundation, 1952 | reel 168 | frame 1 | |
| Answers to Congressional Questionnaire - The Henry J. Kaiser Family Foundation, 1952 | reel 168 | frame 47 | |
| Answers to Congressional Questionnaire - Kate Macy Ladd Fund, 1952 | reel 168 | frame 81 | |
| Answers to Congressional Questionnaire - John and Mary R. Markle Foundation, 1952 | reel 168 | frame 101 | |
| Answers to Congressional Questionnaire - The A. W. Mellon Educational and Charitable Trust, 1952 | reel 168 | frame 256 | |
| Answers to Congressional Questionnaire - New York Community Trust, 1952 | reel 168 | frame 307 | |
| Answers to Congressional Questionnaire - Old Dominion Foundation, Inc., 1952 | reel 168 | frame 310 | |
| Answers to Congressional Questionnaire - The Rockefeller Foundation, 1952 | reel 168 | frame 377 | |
| Answers to Congressional Questionnaire - Russell Sage Foundation, 1952 | reel 168 | frame 543 | |
| Answers to Congressional Questionnaire - Sarah Mellon Scaife Foundation, 1952 | reel 168 | frame 581 | |
| Answers to Congressional Questionnaire - Trexler Foundation, 1952 | reel 168 | frame 609 | |
| Answers to Congressional Questionnaire - Twentieth Century Fund, Inc., 1952 | reel 168 | frame 628 | |
| Additional Views of Angier L. Goodwin, December 16, 1954 | reel 168 | frame 684 | |
| Congressional Record - Proceedings and Debates of the 84th Congress, June 14, 1955, 1955 | reel 168 | frame 690 | |
| Correspondence and Memoranda, 1952-1955 | reel 168 | frame 692 | |
| | | | |

| reel 168 | frame 847 |
|----------|--|
| reel 168 | frame 946 |
| reel 168 | frame 957 |
| reel 168 | frame 975 |
| reel 168 | frame 977 |
| reel 168 | frame 1074 |
| reel 168 | frame 1093 |
| reel 168 | frame 1095 |
| reel 169 | frame 1 |
| 1001 107 | Traine 1 |
| | reel 168 reel 168 reel 168 reel 168 reel 168 |

Tax Reform Act of 1969, 1962-1981

Scope and Contents note

Information in Series 3.2B details the second set of actions and changes that Congress made relating to non-profit organizations and their taxation.

| Title/Description | Instances | |
|--|-----------|-----------|
| Commission on Foundations and Private Philanthropy, May 10, 1970 | reel 169 | frame 299 |
| Conferences on the Tax Reform Act of 1969 - Kansas City, Missouri and New York, New York, 1969 | reel 169 | frame 339 |
| Congressional Hearings, 1969 | reel 169 | frame 471 |
| Federal Register - Part 1, April 2, 1971 | reel 169 | frame 523 |
| Foundations and the Tax Bill, 1969 | reel 169 | frame 525 |
| Foundations and the Tax Bill - Testimony on Title I of the Tax Reform Act of 1969 - Submitted by Witnesses Appearing Before the United States Senate Finance Committee, 1969 | reel 169 | frame 566 |
| Hartke Subcommittee, 1973-1975 | reel 169 | frame 682 |
| House Resolutions, 1965-1973 | reel 169 | frame 840 |
| Internal Revenue Service Tax Reform Act Regulations and New York City Real Estate Tax, 1970-1973 | reel 169 | frame 843 |

| Marianna O. Lewis - Congressional Tax Reform Act, 1969-1971 | reel 169 | frame 963 |
|---|----------|-----------|
| Dick Magats' Materials on Tax Reform Act of 1969, 1969 | reel 170 | frame 1 |
| Memoranda, 1971-1973 | reel 170 | frame 143 |
| Wright Patman, 1964-1972 | reel 170 | frame 167 |
| Private Foundations - Hearings Before the Subcommittee on Foundations of the Committee on Finance - United States Senate, 1973-1974 | reel 170 | frame 201 |
| Senate Resolutions, 1965-1969 | reel 170 | frame 203 |
| "Speaking Freely" - WNBC Television, January 29, 1968 | reel 170 | frame 205 |
| Summaries, 1965-1970 | reel 170 | frame 242 |
| Summary of the Tax Reform Act of 1969 by The Foundation Center, 1970 | reel 170 | frame 291 |
| Tax Exempt Foundations - Their Impact on Small Business, 1964-1967 | reel 170 | frame 308 |
| Tax Exempt Foundations and Charitable Trusts - Their Impact on Our Economy, 1962-1972 | reel 170 | frame 310 |
| Tax Reform Act of 1969 - Clippings, March-September 1969 | reel 170 | frame 312 |
| Tax Reform Act of 1969 - Clippings, October-December 1969 | reel 170 | frame 451 |
| Tax Reform Act of 1969 - Clippings, January-April 1970 | reel 170 | frame 668 |
| Tax Reform Act of 1969 - Clippings, 1969-1974 | reel 170 | frame 680 |
| Tax Reform Act of 1969 - House Resolution 13270, 1969 | reel 170 | frame 826 |
| Tax Reform Act of 1969 - Miscellaneous - Congressional Record - Memoranda and Press Releases, 1961-1981 | reel 170 | frame 829 |
| Technical Explanation of Treasury Tax Reform Proposals, April 22, 1969 | reel 171 | frame 1 |
| Testimonies, 1969-1974 | reel 171 | frame 223 |
| Treasury Department Report on Private Foundations, 1965 | reel 171 | frame 276 |
| United States Department of the Treasury - Internal Revenue Service - Transcript of Proceedings, December 7, 1971 | reel 171 | frame 278 |

Internal Revenue Service, Congressional Hearings from the 1970s-1990, 1976-1990

Scope and Contents note

Series 3.2C includes material about the third set of tax-related actions taken by Congress against non-profit organizations.

| Title/Description | Instances |
|-------------------|-----------|
| | |

| Congressional Hearings - Thomas R. Buckman's Statement to the Subcommittee on Taxation and Debt Management, February 24, 1984 | reel 171 | frame 281 |
|--|----------|------------|
| Congressional Hearings - General Accounting Office Study, 1981-1984 | reel 171 | frame 370 |
| Congressional Hearings - House and Senate, 1983-1984 | reel 171 | frame 519 |
| Congressional Hearings - House Subcommittee on Commerce - Consumer and Monetary Affairs, 1983 | reel 171 | frame 645 |
| Congressional Hearings - Witness Statements Before the Subcommittee on Oversight Concerning the Operations and Activities of Private Foundations, June 27, 28 and 30, 1983 | reel 171 | frame 669 |
| General Accounting Office - Draft of Proposed Report - Public Information Reporting By Tax-Exempt Private Foundations Needs More Attention by IRS, 1982 | reel 171 | frame 990 |
| Hearing Before the Subcommittee on Government Operations, May 11, 1983 | reel 171 | frame 1082 |
| Hearing Before the Subcommittee on Oversight of the Committee on Ways and Means, 1983 | reel 171 | frame 1084 |
| Internal Revenue Service, 1976-1986 | reel 172 | frame 1 |
| Internal Revenue Service - Aperture Cards Shipping and Delays, 1985-1987 | reel 172 | frame 263 |
| Internal Revenue Service - Articles, 1989-1990 | reel 172 | frame 309 |
| Internal Revenue Service - Correspondence, 1983-1990 | reel 172 | frame 328 |
| Internal Revenue Service - Designation of the Foundation Center, 1977-1980 | reel 172 | frame 492 |
| Internal Revenue Service - Financial Accounting Standards Board, 1983-1984 | reel 172 | frame 999 |
| Internal Revenue Service - Form 990 Advisory Committee, 1980-1985 | reel 173 | frame 1 |
| Internal Revenue Service - Revision of Form 990-PF, 1981-1984 | reel 173 | frame 441 |
| Internal Revenue Service - Russell Mawby, 1990 | reel 173 | frame 533 |
| Internal Revenue Service - Meeting in Philadelphia, December 10, 1985, 1985 | reel 173 | frame 544 |
| Internal Revenue Service - Mid-Atlantic Service Center, 1971-1978 | reel 173 | frame 593 |
| Internal Revenue Service - Systems Modernization Forum, May 30-June 1, 1990 | reel 173 | frame 616 |
| Report and Recommendations to the Commission on Private Philanthropy and Public Needs on Private Philanthropic Foundations, August 12, 1974 | reel 173 | frame 752 |

Statistics of Income Bulletin, Fall 1985

reel 173

frame 907

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