



Rockefeller University records, Corporation, Treasurer, Financial Report and Supplement

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Rockefeller Archive Center

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Summary Information

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| Repository: | Rockefeller Archive Center |
| Creator: | Rockefeller Institute for Medical Research |
| Creator: | Rockefeller University |
| Title: | Rockefeller University records, Corporation, Treasurer, Financial Report and Supplement |
| ID: | FA867 |
| Date [inclusive]: | 1910-1979 |
| Physical Description: | 6 Cubic Feet 5 boxes (70 pamphlets). Extent is approximate. |
| Physical Description: | 5 boxes (70 pamphlets). |
| Language of the Material: | English |

Preferred Citation note

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

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Biographical / Historical

By the By-Laws of the Corporation adopted in 1910, a Treasurer of the Corporation was to be elected by the Board of Trustees at the annual meeting. The Treasurer was designated as the officer to have custody of the permanent funds and securities of the Corporation, to pay bills incurred by resolution of the Board of Trustees under the authority of the Executive Committee, and to make payments to the Board of Scientific Directors upon authorized requisition from them. It was the duty of the Treasurer to keep proper books, to present at each meeting an exact accounting of receipts and disbursements and to present an annual report of the accounts of the year. Additions to the Rules of the Board of Trustees provided that the Treasurer act as secretary of the Finance Committee and have custody, of its minutes and other papers and documents relating to the work of the committee.

The first treasurer of the Corporation was Louis Guerineau Myers who served until 1932. Costs of the Treasurer's office were shared among several of the Rockefeller philanthropic enterprises such as the General Education Fund and the Laura Spelman Rockefeller Fund. The Board of Trustees was

empowered to appoint an Assistant Treasurer and Lefferts Mason Dashiell was appointed in 1923. He became Acting Treasurer in 1932 upon the death of Louis G. Myers and was appointed Treasurer of the Corporation in 1939. Edward Robinson became Assistant Treasurer and Treasurer in 1939 with Benson Blake as Assistant Treasurer. In 1942 Edward Emerson became Assistant Treasurer and in 1954 he was succeeded by Robert Letort.

In 1953 new By-Laws of the Corporation were adopted, and under the reorganization then instituted a complete study of the business and financial administration of the Institute was authorized. Over a period of several years thoroughgoing changes of positions and responsibilities were established.

Between 1955-1959 Edward Robinson served as Treasurer and Robert Letort as Assistant Treasurer. Lindsley F. Kimball became Treasurer April 1959 (though elected to take office January 1, 1959) and William E. Dietz took office as Assistant Treasurer in March 1959. The office of William Dietz was enlarged to include the newly created office of Comptroller which included supervision of the office of the Bursar which in 1961 became the Bursar and Deputy Assistant Treasurer.

In May 1965 when Lindsley F. Kimball retired, J. Richardson Dilworth, who as Trustee had been very active and influential on the Finance Committee became Treasurer. Until 1969, while new patterns were developing, William E. Dietz, as Assistant Treasurer and Controller supervised much of the financial management of the University. William E. Dietz retired December 1969.

Finally a clear-cut division between the management of the University's business and the management of financial properties and investments was established. Joseph Richardson Dilworth served as Treasurer, Sydney Anglin Woodd-Cahusac as Associate Treasurer and Arthur Francis Hubbard as Deputy Assistant Treasurer. In May 1971 J. Richardson Dilworth, who continued as a trustee of the University and chairman of its Finance Committee was succeeded as Treasurer by Sydney A. Woodd-Cahusac and in 1972 Arthur F. Hubbard became Assistant Treasurer.

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Biographical / Historical

Beginning in 1959 a Financial report was printed by the Press for release to the public, but an additional report called Supplement (after 1961 was available from the Treasurer which included greater details and was primarily for internal distribution. June 30, 1970 the format of the Report was changed in accordance with recommendations in the 1967 revision of College and University Business Administration.

Beginning with June 1979 only the Financial Report Supplement was issued while the public information Financial Report became part of the President's Annual Report.

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Scope and Contents

Annual report of the Treasurer showing the whole amount of real and personal property owned by the Corporation, where located, and where and how invested; the amount and nature of the property acquired during each year (fiscal) preceding the date of the report, and the manner of acquisition; the amount applied, appropriated or expended during the preceding fiscal year and the purpose, objects or persons to or for which such applications, appropriations or expenditures made.

Includes signed and notarized affidavit for each year 1924-1958 (affidavits for 1959 and later are included in Trustees' Minutes) and Summary or Abstract of Annual report (after 1959 included in Trustees' Minutes).

For the year ending June 30, 1956 a sample Financial Report was distributed at the Trustees' meeting January 30, 1957 to get approval for a type of report that could be made public.

Starting 1924 and through 1944 includes Affidavit signed by Treasurer and President and Abstract of Annual Report.

1959-1968 also numbered v. 4, no. 2; v. 5, no. 1-v. 13, no.1 in its Bulletin.

Lacks 1913 (copy bound with Corporate Minutes).

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Arrangement

Arranged in chronological order by year as of each June.

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File Plan note

Former Classification: I 190-5

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Administrative Information

Publication Statement

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Revision Description

Conditions Governing Access note

This collection is open for research. Brittle or damaged items are available at the discretion of RAC.

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Collection Inventory

| Title/Description | Instances |
|-------------------|-----------|
| 1910-1944 | box 1 |

Scope and Contents

Each includes: Balance sheet; Expenses by Department, Construction and equipment accounts, Statement of income and expense accounts and special funds, Report of Finance Committee transactions, Schedule of securities.

| | |
|------------------------------------|-------|
| Report of the Treasurer, 1910-1920 | box 1 |
| Financial report, 1921-1924 | box 1 |
| 1945-1961 | box 2 |
| Financial Report, 1945-1958 | box 2 |

Scope and Contents note

In addition for 1956 is sample of suggested Financial report for Public information.

| | |
|------------------------|-------|
| Financial Report, 1959 | box 2 |
|------------------------|-------|

Scope and Contents note

In 3 parts: (1) abstract, (2) Report of the Treasurer, (3) For public distribution.

Financial Report, 1960

box 2

Scope and Contents note

In 2 parts: (1) Financial report (2) Report of the Treasurer.

Financial Report, 1961

box 2

Scope and Contents note

In 2 parts: (1) Financial report and (2) Financial report Supplement.

Financial Report, 1962-1971

box 3

Scope and Contents note

In 2 parts: (1) Financial report supplement (2) Financial report.

Financial Report, 1972

box 3

Scope and Contents note

In 2 parts: (1) Financial report supplement (2) Financial report.

Financial Report, 1973

box 3

Scope and Contents note

In 2 parts: (1) Financial report supplement (2) Financial report.

Financial Report, 1974

box 3

Scope and Contents note

In 2 parts: (1) Financial report supplement (2) Financial report.

Financial Report, 1975-1978

box 4

Financial report supplement, 1979 June 30

box 5