

June 20, 1949

Mr. William W. McPeak  
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Dear Bill:

This is the "planning letter." It proceeds from the first draft of the general report and hence should not be read or thought about until the draft is completed.

We have reached the final phase of the Study and as soon as practicable you and I should agree upon a plan for a "T-Day" (termination day). This requires several assumptions: (1) the additional trustees will be elected by August 1st; (2) the President will not be elected before September 1st and may not be available, full time, before January 1st; (3) the President will want to work with us and the committee until he can organize the permanent staff; and (4) the Study should not be terminated until the President has an opportunity to participate in and influence the final phase.

These assumptions raise two obvious questions:

(1) What are our (the staff) work assignments until September 1st? (2) What use should be made of the committee or particular members thereof until September 1st? Let me suggest some of the answers for your examination, rejection, or modification.



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1. Review and revision of first draft of general report:

a. Staff review:

I would like to review the first draft alone and unaided. A cursory review, followed by a conference with you and Paul, would make it difficult for me to be constructively critical. I would be influenced by your superior knowledge of the subjects and source materials; and conference explanations and discussions would cause me to interpolate, to interpret, and to attach a significance which a less informed or unbriefed reader might not. In other words, I think it wise for me to play the hypothetical "trustee", to evaluate the report on the "record", to test the accuracy or comprehensiveness of the report by studying or spot checking the source materials, and to conclude the review with a memorandum of suggestions. Then a conference would be essential. Dyke can play by the same rules and we can hammer out suggestions into agreement before conferring with you and Paul.

b. Staff conference:

The date of our conference would be about one to two weeks after the last part of the report reaches me. Our comments would be sent in installments so you and Paul will have ample opportunity to consider them.

c. Review and assistance by experts:

We talked last week of a review of the draft and supplementary work by expert advisors of our selection. I advanced two reasons: (1) If the committee is to recommend



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program priorities, perhaps the views of an advisory group of persons possessing more expert knowledge in the field of human relations and social organization will be essential.

(2) If your review of the source materials discloses important omissions or inadequacies, experts might be more useful than committee members (e.g., Tom Carroll is reporting upon programs outside his training and experience). There are reasons against the use of experts for these purposes which I will discuss under paragraph 2.

d. Review and assistance by "generalists."

We have agreed that the report can be improved if our best effort is exposed to the critical analysis of several wise, objective persons whose judgment will not be impaired by specialization or prejudice in favor of pet theories or projects. I think of Devereaux Josephs as one such person. I also eliminate persons like Edwin Embree who is so entrenched in several fields that his judgment would be biased in their favor. I assume that we are still in agreement on this part of the plan. That being so, who are our advisors, what review method do we propose, who will see them, and when?

There are several people I would want to confer with in any event. One is Alfred Loomis. Another is Frank Collbohm. A "Rand" type review with a few working "integrators" such as Hans Speier can be mobilized and completed quickly. Larry Hafstad and Bill Webster are others to whom I would naturally turn although I may not because I think our list



of "generalists" should be short.

Review method? Individually, not committee or panel type and certainly confined to the report itself. I have no desire to go back over the entire trail or to discover that astro-botany, not human relations, is the most important field. Much of the interviewing I will want to do personally. Not being a co-author, I have an advantage in eliciting comment.

Time? As soon as possible after we have conferred and made agreed revisions.

## 2. Use of experts:

Experts in selected fields could also be used to criticize monographs prepared from committee materials, to prepare special papers or monographs, and in general to shore up the Study. Also, they could be employed, as I have said above, to review the general report.

Indecision marks my thinking on this point. We have not undertaken total coverage. We stop far short of specific projects and purport only to suggest a partial list of approaches. Without further expert advice we should be able to detect omissions and inadequacies. These can be indicated by footnotes warning of the need for further investigation. Isn't it better to provide a schematic and leave the detailed drawings to the permanent staff? Do the trustees need more than we now can present to launch the Foundation? Would they receive anything more than increased conviction and confidence from expert supplementation?



We have been exposed to a vast amount of information, a wide variety of opinions, etc., these past six months. Further expert investigation may only add to, or create, a preponderance of opinion. It seems to me that we should stand upon our present record wherever further investigation would only lend support to our present views or develop different or opposed views which are supported only by opinions of equal respectability; and that we should engage experts or ask for further committee work only on those aspects of the Study which we are unwilling to endorse. Your drafting should smoke out these aspects and our review may disclose a few more.

To conclude this point: At this writing I am disposed toward the minimum use of experts and to acknowledge limitations, omissions, etc. in the report. I will be satisfied if the report discusses the major problems and indicates some promising ways to contribute toward their solution.

### 3. Priorities:

We have said the general report will suggest categories of priority. This is essential because in the field of human relations and social organization the committee has given us many targets. To generalize from our past discussions and writings, priority should be determined by three factors: (a) importance (measured quantitatively where possible and weighted by value judgments), (b) need (inadequate present support) and (c) opportunity (the chance to achieve significant



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results and the availability of people and institutions adequate to the task). The committee has expressed itself to some extent on importance but wants another chance. How can it determine the need and opportunity factors? I doubt that it can without further study and the use of experts. Maybe there is enough evidence to justify categories of priority. I hope you will find this the case and I am anxious to have your thoughts on the point.

4. Policy and program completion:

The remaining assignments can be grouped under this heading and the next, "Organizational subjects".

After the first draft of the general report it is my hope that you and Paul can block out the monographs. It seems most unlikely that revisions of the general report would change substantially the organization and content of the monographs. This could be done while Dyke and I are reviewing the general report. Early instructions to the committee are essential if their morale is to be maintained and their summer "leisure" to be utilized. I hope that all monographs to be prepared by the committee can be completed by August 1 to 15 and scheduled so that Paul's desk does not become the bottleneck.

5. Organizational subjects:

There are two parts: (a) the series of confidential memos - some of which relate to policy; and (b) personnel.



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(a) I can rough draft those which embody tentative decisions of, or preliminary reports to, the trustees to date such as (1) The Detroit Foundation, (2) Relationship between the Foundation and the Ford Motor Co. , (3) Investment policy (including diversification), (4) Public accountability and reporting, (5) Tax exemption, (6) Relationship between the Foundation and the Donor Family, (7) Trustee qualifications, (8) By-law revisions, etc. Some of these may be consolidated and others incorporated into Don's report. All will have to be redrafted and improved in substance by you, Don, and Paul. With any breaks I can get these drafts completed by July 1st. Since they are not apt to be changed by the introduction of the President into the Study, the memos can be put into final form as soon as practicable.

(b) Personnel. The present trustees have received some indoctrination, principally in organization problems and policies. The new trustees may wish to be briefed individually before the first meeting of the increased board in order to conserve meeting time and to avoid a monotonous "play back" for the present trustees. I will undertake this assignment unless we decide that the conference (McP., D.P. and R.G.) technique would be more effective.

The other personnel assignment is the search for the President. I can do little on this until I talk to Henry. In the interim, however, we should be on the alert for prospects.



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6. Committee:

The letter so far suggests using the committee members as consultants and as monograph authors. The general report should go to them after staff review and perhaps prior to revision for preparation of critiques. If the suggested revisions are not extensive, a rewrite could be prepared and circulated. The meeting, in this event, should be held when the President is available. If extensive disagreement is disclosed by the critiques, it might be advisable to hold a committee meeting before the selection of the President. However, it is my hope that one more committee meeting, after we have the President, will be all that is required for unanimous committee endorsement and the President's education. Thereafter the committee and individual members would be available to the President for consultation and special assignments.

7. Time schedule:

The schedule which this letter suggests has, I hope, some slack in it and looks something like this:

June 20 to June 30:

1. McPeak and Bixler complete first draft of general report
2. R.G. drafts series of confidential memos.



July 1 to July 15\*

1. McPeak and Bixler program monographs and send instructions to committee;
2. McPeak, Bixler and Price review and revise series of confidential memos;
3. Gaither and Brown review general report;
4. Review of general report by advisors may begin.

July 15 to July 31:

1. Staff: (a) Confers on first draft of general report  
(b) Completes second draft " " "  
(c) Confers with advisors on " "  
(d) Submits second draft to committee
2. Committee: (a) works on monographs  
(b) Reviews general report
3. Miscellaneous: (a) R. G. confers with Trustees  
(b) R. G. advises on personnel.

August 1 to 15:

1. Staff: (a) Completes monographs  
(b) Makes agreed revisions of general report  
(c) Organizes archives
2. Committee: (a) Completes monographs  
(b) Possibly meets.

\* McPeak takes off two hours on 9th for marriage.



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8. Place of work:

We have discussed completing the Study in San Francisco. There are many advantages, other than personal and professional, such as stenographic staff, duplicating facilities, etc. The cost of bringing you and Elberta, Paul and Don here and maintaining you on any reasonable basis is substantially less than the cost of the New York office and my travel and living expenses. The saving would be from \$2500 to \$3000 per month. So much for the rationalization! The primary disadvantage is that we would be far removed from some advisors and several committee members. There is also the risk that I would be called east for appointments with Trustees, to interview prospects, etc., and find myself separated from the "brains" of the Study. This risk could be minimized, of course, by prior agreement with the Trustees. I simply throw the question out for further consideration but admonish you that deference to my personal and professional reasons cannot enter into the decision.

My best regards to all.

Sincerely,

Rowan Gaither