COMMUNITY TRUSTS: THEIR RELATIONSHIPS
WITH COMMUNITY CHESTS, COMMUNITY WELFARE COUNCILS
AND OTHER SOCIAL WORK AGENCIES

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CHAPTER I

INTRODUCTION

Purpose

In studying the history of social welfare in this country, the student is, sooner or later, bound to recognize the similarity of the objectives of Community Trusts and Community Chests and Community Welfare Councils. The writer, having become aware of this similarity, felt that a study of these agencies of social welfare, and their relationships, might be of some value to the literature of the field, especially to those communities who might be considering the establishment of a Community Trust in their city.

After considerable discussion and correspondence with leaders in both the field of Community Trusts and Community Chests and Councils, it seemed desirable to endeavor to serve the following purposes in this study:

(1) To determine the present extent of capital funds in certain representative and active Community Trusts in the United States and Canada

(2) To determine the administrative structure of these Trusts

(3) To determine the degree of administrative relationship between the Community Chest and the Community Trust and Community Welfare Council in each city

(4) To ascertain whether there was inter-locking between the Boards of Directors or Trustees of these organizations
(5) To determine to what degree there was a co-operative relationship between these organizations, and to what extent Community Trusts made grants to Community Chest agencies.

(6) To determine what areas of relationship pattern might be strengthened by these agencies, in order that each might better serve their own community.

(7) To determine whether professional workers in the area of community organization believed that the local Community Chest and/or Community Welfare Council should take the initiative in stimulating the development of a Community Trust in those communities where there is, at present, no Community Trust.

(8) To profit by the experiences of those communities in which there exists a Community Trust, as well as a Community Chest and a Community Welfare Council, and cite these experiences for the benefit of those communities that are contemplating the establishment of a Community Trust.

Limitations of the Study

The author does not contend that this study shows the degree or the extent of the relationships between these social welfare agencies in the nation as a whole, or even the complexities and ramifications of a situation within any single community. The true and complete picture of these varied and subtle relationships could only be assessed by an on-the-spot observer, living in each community for some considerable period of time. The writer does, however, believe that the response to the questionnaires received indicates the specific pattern of relationships that exists in
regard to the areas he wished to study. Although it was not deemed desirable or wise to attempt to canvas the opinions of all Community Trusts in the country and Canada, it might be pointed out that those Community Trusts who cooperated with the author to the extent of completing and returning the questionnaire, represent a sizable cross-section of the total number of Community Trusts. It is also significant to note the total active capital of the cooperating Community Trusts. Excluding the New York Community Trust, we find that those Trusts who cooperated in this study, represent approximately 78.5% of the total active capital resources of Community Trusts in the United States and Canada. To an extent, capital funds may not indicate activity that contributes to overall social welfare of a community. In general, however, we find that where there is active capital, grants are being made annually to some social welfare agencies in the community and the Community Trust is making some contribution to the needs of some agencies. In those situations where the Community Trust is only in the embryonic stage of development, or has failed to rally the financial support that is so necessary, there is little or no impact on the social welfare needs of the community. Actually, that Community Trust exists in name only.
Definition of Terms

**Community Chest.** In this thesis, the term Community Chest refers to the voluntary association of community health, welfare and recreation agencies that are united in a common fund-raising effort within the framework of community planning and central budgeting procedures. Recent developments in more inclusive fund-raising have resulted in the abandoning of the term Community Chest and the use of such terms as United Fund, United Community Services, Red Feather Fund, etc. Nevertheless, for the purpose of this thesis, the general term Community Chest will be used to describe these agencies. For the sake of brevity, this term is occasionally shortened to the single word, Chest.

**Community Welfare Council.** This term refers to the voluntary association of many community agencies, for the purpose of cooperative planning, coordination of social services and the mobilization of all community resources for the preservation and promotion of human values. These cooperative planning organizations are known variously as Planning Councils, Councils of Social Agencies, or Community Councils, but for the purpose of this thesis they shall be known as Community Welfare Councils. In some instances, they are referred to simply as Councils.

**Community Trust.** This term refers to the legal mechanism
designed to furnish a community with the benefits of an 
enduring source of income for specific and/or general 
charitable or civic purposes by providing a standardized, 
flexible form of administration for permanent endowment funds 
to be contributed by interested persons, in the form of gifts, 
bequests or devises. On occasions, in this thesis, these 
organizations are referred to simply as Trusts.
CHAPTER II

HISTORICAL REVIEW

Foundations and Trusts in Early History

In any written history of mankind, it must be recorded that man has always evidenced a concern for his fellow men and their welfare. From the earliest time, the group, the tribe, the clan and other sociological groupings took cognizance of the fact that there were some among them that were injured, ill or unable to contribute to the common cause for one reason or another. Some means were always found, crude as they might have been, to provide some measure of subsistence and care for these persons.

Those persons who have possessed some measure of wealth have generally taken some responsibility for their fellow men in less fortunate economic circumstances. The acceptance of this responsibility was, of course, not uniform. There were those who felt that only direct and personal assistance was the solution to human needs. Others held that the church, acting as God's agent on earth, should be the instrument of charity. In this connection, it might be noted that the role of the church in alleviating human suffering and need, has not always been consistent. At times it has espoused the doctrine that man's eyes should not be cast upon his troubles in this mundane and transitory life, but rather
should be focused upon his heavenly reward. In other times, the
church has done many things to relieve suffering and need. In
medieval times the churches urged their parishioners to make gifts
to the church in order to redeem their sins and assure heavenly
grace. Even today, large gifts to churches are viewed by some as
an endeavor to buy one's way into heaven. Regardless of his
motives, then, man has seemingly been determined to some extent
to recognize the needs of his fellow men, and while accomplishing
this worthy objective he has often sought to assure himself that his
name will be remembered by future generations.

Plato endowed his Academy with some of his farm lands, in order
that education might continue in his native city. The Ptolemies of
Egypt provided for a library at Alexandria, and the younger Pliny
left a part of his estate for a school at Como. In the days of
Plato, the laws of inheritance recognized only the family as the
legitimate heir of an estate, so it was necessary for that ancient
scholar to give his property to his nephew and direct that he in
turn, pass it on to another individual prior to his death, with
the same instructions.

By the time of the great Roman Empire the "corporate person-
ality in form and substance was a thoroughly Roman concept"¹, which

¹Badin, Max, Handbook of Roman Law. West Publishing Co., St. Paul
Minn., 1927, p. 226.
resulted in some relaxation of the laws of inheritance. Some of the forerunners of modern foundations were established in the second and third centuries, and there is evidence of some philanthropic work being carried on by these early family foundations.

During the Middle Ages, there was a sudden growth of the foundation idea, due perhaps to ecclesiastical encouragement. In those times, when man's thoughts were turned more to heaven than earthly pursuits, it was natural that the church leaders should encourage the wealthy men to form foundations that would be evidence of their piety and good works on earth, in order that their way into the next world would be easier. It is not surprising then, that the established church grew enormously wealthy and controlled the vast holdings of land in Europe.

Historical authorities seem agreed that Henry VIII of England was only acting in his own interests when he confiscated the holdings of the church in England, for his concern was not over the problems that prompted the Reformation on the Continent. Clearly desiring to obtain control of the vast properties of the church in England, he accomplished this goal and then set up an almost identical church of his own, but did not endow it with a great deal of property. At the time Henry VIII accomplished this seizure of the foundations, lands and holdings of the Roman
Catholic Church in England, it is estimated that the holdings of
the church represented from one-third to one-half of the total
wealth of the country.

The next period of foundation growth followed shortly after
this, in England, and is notable in many respects, for it sprang
from the growing middle class in that nation. During the reign
of Queen Elizabeth, the Parliament passed the so-called Statute
of Charitable Uses, which gave state sanction to funds and
foundations and outlined some of the uses to which they might
be put

"...Some for relief of aged, impotent and
poor people, some for maintenance of sick
and maimed soldiers and mariners, schools
of learning, free schools, and scholars in
universities, some for repair of bridges,
ports, havens, causeways, churches, sea-
banks and highways, some for education and
preference of orphans, some for or towards
relief, stock or maintenance for houses of
correction, some for marriages of poor
maids, some for supportation, aid and help
of young tradesmen, handicraftsmen and per-
sons decayed, and others for relief or re-
demption of prisoners or cantives, and for
aid or ease of any poor inhabitants
concerning payment of...taxes..."

In the years that followed, the foundation idea must have spread
throughout the entire country. One writer cites the report of a

for Social Welfare*, Russell Sage Foundation, New York, N.Y.,
1946, p. 16.
Royal Commission of Inquiry which tells of the existence of some 28,840 funds and foundations by 1837.\(^3\) Many were perpetuities, established to carry on some limited or obscure charitable or civic function, and many were of doubtful value. Some of these foundations are hardly worthy of the name, and seem to indicate only the donor's intention of keeping his memory alive in the minds of future generations. One man bequeathed the sum of fifty pounds a year, in trust, to the bell-ringers of a church in Bath, England, for the purpose of ringing the bells, muffled, from 8:00 A.M. to 8:00 P.M., on the 14th of May, each year, his wedding anniversary. In addition, the donor requested that on the anniversary of his death, each year, they ring merry peals of joy in commemoration of his happy release from domestic tyranny.\(^4\)

**AMERICAN FOUNDATIONS BEFORE 1900**

The frontier nature of American colonial life, and the predominantly agricultural society was not conducive to the establishment of foundations, nor were there many wealthy men to provide the funds necessary for such undertakings. Not until the time of Benjamin Franklin do we see evidences of thought in this


direction. The canny Franklin must have been intrigued by the idea of compound interest, for his will provided for the establishment of two funds of $5,000 each. The money was to be lent, at five per cent interest to young married artisans in amounts of $300, and the repaid loans were to be added to the principal sum, and the loan process continued for a period of one hundred years. Although the apprentice system passed out of existence, the fund Franklin established in Boston was invested in securities, and in 1891 was valued at $391,169. The majority of this money was spent in establishing the Franklin Technical Institute.

Soon after the establishment of Franklin's foundation, the Magdalen Society of Philadelphia was founded (1800) as a perpetuity, the income from which was to "ameliorate the distressed condition of those unhappy females who have been seduced from the paths of virtue, and are desirous of returning to a life of rectitude." As is so often the case with perpetual trusts, the foundation has outlived its original purpose; it was re-organized in 1918 under the name of the White-Williams Foundation and its regulations changed to permit it to engage in "...the progressive solution of problems which affect the immediate or ultimate interests of children and youth of school age."  

\[\text{\textsuperscript{5} H}\text{arrison and Andrews, op. cit., p. 17.}\]
\[\text{\textsuperscript{6} Abid., p. 17.}\]
Perhaps the most notable of the early American foundations is the Smithsonian Institution, which was established by James Smithson, an English scientist, "for the increase and diffusion of knowledge among men." Since its founding, it has contributed to scientific research and has served as a storehouse of scientific, cultural and artistic materials, and in this sense, has not served precisely as a foundation.

Another foundation that came into being in the nineteenth century is the George Peabody Education Fund, which was begun in 1867, and aimed at improving educational facilities in the South after the Civil War. Mr. Peabody left some two million dollars for this work, with the instructions that the trustees might close the fund after thirty years of operation, upon agreement of two-thirds of the trustees.

During the remainder of the nineteenth century only two other foundations made any impact on social welfare in the United States. The John F. Slater Fund, established in 1882, provided funds for Southern education, and was incorporated, in 1937, into the Rockefeller-established Southern Education Fund. In 1890, the Baron de Hirsch Fund was set up to provide assistance to Jewish immigrants. Slowly, the foundation idea was taking root in this country, and finding more favorable economic circumstances, it was soon to reach its full flowering in the twentieth century.

7 Ibid., p. 17.
In 1901, Andrew Carnegie, already a wealthy man, sold his vast steel holdings to the newly-formed U.S. Steel Corporation for approximately $500 million. He had, some years before, set down his credo of philanthropic giving:

"...The millionaire will be but a trustee for the poor, intrusted for a season with a great part of the wealth of the community, but administering it for the community far better than it could or would have done for itself... The man who dies thus rich dies disgraced..."8

Therefore, when he found himself retired from business, Carnegie began to actively dispose of his fortune. Not falling into the error of attempting to relieve every human misfortune, he felt called upon to establish what he described as ladders, for those who wished to rise higher in the world. In the years before his death, Carnegie established eight separate funds, totalling more than $200 million, and in general, set the tone for philanthropic giving to foundations and trusts in this century.

At about the same time that Andrew Carnegie was earnestly beginning to dispose of his fortune, another wealthy man was experiencing many problems in connection with the disposition of a portion of his wealth. Like every man of considerable means, John D. Rockefeller Sr. was sorely beset on every side by appeals

8 Ibid., p. 17
for funds for all manner of charities, pet schemes, etc. Through his close association with the Baptist Church, Rockefeller came to know Frederick T. Gates, then Secretary of the American Baptist Education Society. Gates was an astute and capable man, and urged Rockefeller to give away his fortune faster than it accumulated, but to dispose of it in such a way that it would benefit mankind. Acting on Gates' advice, after he had secured his services, Rockefeller began by setting up the Rockefeller Institute for Medical Research in 1901. Later the General Education Board and the Rockefeller Sanitary Commission were founded, and finally, in 1910, the fabulous Rockefeller Foundation was launched. By his endowments of over $400 million to these foundations, John D. Rockefeller Sr. has succeeded in making his name almost synonymous with philanthropy.

Other wealthy men and women, seeing the advantages of this kind of philanthropic giving, hastened to establish their own foundations and trusts. Most of these were patterned after and followed the line of thinking that was responsible for the Carnegie and Rockefeller foundations. The aims and objectives of these foundations were not directed at the alleviation of individual suffering or the granting of direct relief. Clearly, the resources of all the foundations and trusts in this country are tiny as compared to the governmental expenditures for general
relief in a single year. Thus, the work of foundations and trusts must be more specialized, if significant achievements are to be made. Andrews has succinctly described the basic philosophy of the modern foundation in stating that,

"...The humanly appealing cause of direct relief--orphans, crippled children, the impoverished aged--still attract the funds of many foundations, particularly the smaller ones. But...most experienced foundation administrators have felt that such needs should be met by general charitable contributions or from tax funds, while the modest resources of foundations should be devoted to longer-range, more difficult projects which would not usually appeal to individual givers. Discovery in the physical sciences, the biological sciences (particularly medicine and public health) and in the social sciences--has been the keynote of their programs...."9

In recent years, the field of philanthropy has been enriched and publicized by the establishment of what may prove to be the largest of all foundations, the Ford Foundation. Established in 1936, it was not accorded general recognition until the death of Edsel Ford in 1943, at which time it was found that he had left the bulk of his fortune (some one million shares of non-voting Ford stock) to the Ford Foundation. This foundation was similarly enriched at the death of Henry Ford, and today it holds some ninety per cent of the equity of the Ford Motor Company. Since this company has always been a tightly

controlled family corporation, it is not unfair to suspect that the Ford Foundation was established in order to keep control of the company in family hands, by avoiding the payment of huge inheritance taxes, which would have necessitated the sale of a portion of the company stock on the open market. Since the stock of the Ford Company has never been sold on the open market, it is impossible to determine the exact capital assets of the Ford Foundation. Some conservative estimates place the worth of the foundation's assets at about $625 million.

The stated purposes of foundations vary widely, though it might generally be said that the larger foundations state their purpose in very general language, usually making reference to the advancement of knowledge, the investigation of problems of mankind or providing for the common welfare. Thus the donors have recognized the danger of specifying too narrowly the purposes of the fund, and inviting obsolescence in future years. In some cases of so-called "dead hand" funds, the courts have applied the legal principle of *ex press* (as near as practicable), a development of Roman law that was extended under English jurisprudence. Only by this means has it been possible to amend the provisions of such funds as that established in St. Louis by Byron Mallamphy "to furnish relief to all poor emigrants and travelers coming to St. Louis on their way, bona fide, to settle in the West", or some of the well-meant funds that were

established in the nineteenth century for the building and
maintenance of village horse troughs.

THE COMMUNITY TRUST MOVEMENT

The first Community Trust to be founded in this country
was the Cleveland Foundation which was brought into existence
at Cleveland, Ohio, on January 2, 1914. Truly, it may be said
that its founding was brought about mainly through the efforts
of one man, Judge Frederick H. Goff, for it was he, after years
of study and reflection on the capital needs of local welfare
agencies, who sold the idea to the leaders of that community.
The Cleveland Foundation was established by a Declaration of
Trust adopted by the Cleveland Trust Company, in which that
company agreed to accept gifts, grants and bequests, in trust,
and administer these gifts for the community welfare of the
citizens of the metropolitan area of Cleveland. It is notable
that the bank proposed only to administer the principal sum of
the gifts, and left to a Distribution Committee the task of
determining the beneficiaries of the gifts. This committee
was to be composed of five citizens of the community, selected
on the basis of their knowledge of the educational and charitable
needs of the community. Three members were to be selected by
public officials and two by the trustee bank.

In establishing the Cleveland Foundation, Judge Goff had
two precepts in mind,

(1) the need to insure prudent and disinterested
care of principal sums left to the Foundation,
and

(2) to assure that the donor's wishes would be
carried out exactly as he wished, consistent
with the current welfare needs of the community.

The Declaration of Trust that established the Cleveland Foundation
placed administrative power in the hands of the Distribution
Committee, which was to have absolute and uncontrolled discretion
in the apportionment of the net income derived from bequests,
and such portion of the principal as the donor might wish to be
distributed. It also reserved the right to channel any donor's
gift into some other purpose, if the original purpose was rendered
obsolete by the passage of time. Thus, in one broad, general
declaration, the Foundation was granted wide discretionary powers
as to the distribution of income, and the necessity of lengthy
or drawn proceedings to alter the purpose of dead hand funds was
precluded.

After the establishment of the Cleveland Foundation, the
Community Trust movement spread rapidly, and by 1919 there were
thirty-two such trusts in existence. Today, there are approximately
one hundred and fifteen Community Trusts in this country.\textsuperscript{11} In the
beginning, many of these trusts followed the pattern of organiza-
tion of the Cleveland Foundation, but in Indianapolis in 1916, a

\textsuperscript{11} Loccis, \textit{op. cit.}, p. 8.
Trustees Committee was set up in addition to the usual Distribution Committee. This so-called multiple-trustee plan was adopted when the New York Community Trust was established in 1920, and has, since, been adopted by most of the large Community Trusts. Its objective is clearly, to bring all the trust institutions in the community together as trustees for the bequests and gifts received, and to secure the interest and support of all groups in the community, which is necessary and desirable.

The purposes of Community Trusts are, generally, as follows:

1. The centralization of all charitable and civic funds within a community or a restricted geographical area, for the purpose of accomplishing a more coordinated job of administration.

2. To serve as a medium through which gifts and bequests, both large and small, designated for charitable, cultural or civic purposes, may be most efficiently and continuously administered.

3. To reduce the overall costs of fund administration to the point where it is more economical to make gifts to a Trust than to set up an expensive private foundation. The Trust, however, seeks to maintain the advantage of a private foundation, while making sure that the identity of the donor is not lost through the inclusion of his gift in the Community Trust.

4. To provide within the broad framework of the Community Trust, the necessary safeguards against obsolescence of any fund and the necessity for on demand proceedings.

5. To provide through undesignated funds for the needs of community social work, civic and cultural agencies that might not otherwise be met through traditional fund-raising procedures.
The Community Trust movement in the United States and Canada has had a rather sporadic growth. We have seen that number of trusts increased markedly during the years from 1914 to 1920. After that date, the growth of the movement was somewhat slower until the depression years, when it almost halted. In the early 1940's the movement again picked up momentum, and in the years since World War II, there have been a sizable number of new trusts established and some indications that old, inactive trusts were again soliciting funds. As of December 31, 1951, the aggregate resources of all Community Trusts were $110,091,128, and their disbursements that year amounted to $5,003,811.\textsuperscript{12} In many communities the idea of a Community Trust seems to have been hailed with great promise in the 1920's, and resulted in the establishment of a Community Trust with modest resources. In the intervening years, little has been done to stimulate the continued growth and development of the trust; the community has grown apathetic to the idea, and the trust exists now in name only. Other communities have taken a different view, and with careful planning, the enlistment of broad community support and wise administration, the Community Trust has added annual increases to its body of principal funds and enjoyed a continuing and useful role.

The modern Community Trust of 1953 is most often composed

\textsuperscript{12} Letter, New York Community Trust, dated May 23, 1952.
of three types of funds. They are as follows:

(1) **Designated funds**, which, according to the wishes of the donor, are to be administered for the use of one or more specific institutions.

(2) **Special purpose funds**, for which the donor indicates only the general area to which he wishes his gift to go, and leaves the specific determination of the beneficiaries to the discretion of the Distribution Committee.

(3) **Undesignated funds**, or those which the donor gives to the trust with no stipulation as to their use, thus giving complete freedom to the Distribution Committee to place the funds where they will, hopefully, do the most good.

In a study made in 1949, Loomis found a great variance among individual Community Trusts as to the proportion of these three types of funds. After considering the merits of the three funds, he concludes that

"...In the administration of funds which are general or undesignated, or broadly designated as to purpose...the Community Trust has its greatest opportunity for creative service. Whether wholly undesignated or broadly designated, the opportunity for and the pleasure of creative administration may be of the highest order..."

Who are the beneficiaries of Community Trust funds? This consideration must be made before we can assess the work and worth of any trust. Obviously, the distribution of any Community Trust will depend greatly on the relative proportion of designated, un-

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13 Loomis, op. cit., p. 15.
designated and special purpose funds. Generally speaking, the distributions are divided along the lines of community welfare, with family service agencies, hospitals and health agencies, children's services, neighborhood services, recreation and educational grants making up the bulk of the distributions. The variety and scope of the distributions is wide, and in some communities, the trust is able to supply funds for worthwhile cultural and aesthetic projects. Thus, it is well to keep in mind that grants made by Community Trusts do not go solely to social welfare agencies, nor is this area the major concern of some Community Trusts.

In the administration of principal sums, the bank trustees, under the articles of incorporation of most Community Trusts, exercise discretion in the investment of funds, and the stabilization of diverse and widely-scattered assets is their chief function. For these services, the bank receives the fees that are customarily paid to administrators or trustees of estates. Generally, a Community Trust is administered by a Board of Trustees, Advisory Board or some similarly-named group. Most often this group is known as the Board, Trustees or Foundation Trustees. It is composed of five to nine individuals appointed by public or semi-public officials, with certain members appointed by the trustee banks. Appointments are usually for terms of from five to seven years, with one or two appointments becoming available
each year. Reappointment is usually permitted, to gain continuity and experience in the office. The Foundation Trustees can and should set the tone for the Trust. Theirs is the responsibility to stimulate public understanding and support of the enterprise, the determination of the most effective and meaningful policies, and the carrying out of the program that has previously been determined. In the eyes of the public, this group is the Community Trust.

Obviously, for financial reasons, it is not feasible for many Community Trusts to employ a full-time executive. Only the largest Trusts can afford capable and continuous direction. Who, then, are the men who act in a directive capacity in the majority of Community Trusts in this country? In his study, Loomis\(^ {14} \) found that of ninety active trusts, forty-nine had directors who were bank officers or employees. This fact raises many questions in the mind of the observer. It may cause some reflection in the mind of the public as to the disinterestedness and judgement of the director, for is he not an employee of a profit-making concern? Is he competent to examine and judge the effectiveness of the numerous social welfare agencies with which he must work? Can he, in addition to his other duties, conduct an active and continuous program of public relations that will result in the growth of the funds of the Community Trust? These and other questions come to

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\(^ {14} \) Loomis, *op. cit.*, p. 27.
mind when we consider the number of Community Trusts under the direction of bankers. It is not unfair to consider the overall growth of the movement in this country, and contrast the hopes and aspirations that were engendered when the movement got under way, with the actual condition and number of Community Trusts today. Admittedly, the Community Trust has been a dynamic and worthwhile force in some communities, yet it is of some significance to note that only eighteen cities of the United States and Canada have Community Trusts with principal funds of more than one million dollars.  

Geographically speaking, the Community Trust movement has been most active in the northeastern section of this country. Of the ninety active Community Trusts, fifty-nine are located in the North Central states, the East Central and New England states. The Southern states account for thirteen trusts, and the North-western states of Minnesota, Colorado, Missouri and Iowa account for seven trusts. The three active trusts in Canada are located in the cities of Winnipeg, Vancouver and Victoria.  

Briefly then, we have seen that the Community Trust movement has met with varying success in different communities.  


Only by delving more deeply into the facts surrounding their establishment in individual communities and their work in those communities can we hope to understand the relative effectiveness of Community Trusts as a whole.
CHAPTER III

FINDINGS

Method of Procedure

While engaged in the process of determining the scope and sampling methods to be used in this study, certain considerations were made. According to the latest information available, some ninety-two Community Trusts were known to the national organization, the National Committee on Foundations and Trusts for Community Welfare. It must, however, be recognized that these Trusts are in varying stages of development and growth. Some larger Trusts administer sizable sums of money, and carry on a widespread program of grants to social welfare agencies. Other Community Trusts are quite small, and some are in the early stages of development. One such Trust reports capital funds amounting to thirty-four dollars.

It soon became evident that some means of limiting the study would have to be used. Upon the advice of the national organization, a list of thirty-four Community Trusts was compiled. These Trusts were both large and small in terms of capital funds, but they are generally regarded as being the most active in terms of social welfare in their communities. To this extent then, this study is not representative of the total universe of Community
Trusts in the United States and Canada. The writer feels, however, that the thirty-four Community Trusts who were questioned, do represent a cross-section of those who have taken some responsibility in community social welfare.

A questionnaire was compiled (Appendix), consisting of four pages. It was hoped that this questionnaire would reveal some of the relationships that currently exist between Community Trusts, Community Chests, Community Welfare Councils and other social welfare agencies. Of the thirty-four Community Trusts to which this questionnaire was sent, twenty-three returned the questionnaire completed.

In the hope of shedding further light on the pattern of relationships between these community agencies, an additional one-page questionnaire was compiled and forwarded to the executive of the Community Chest and the Community Welfare Council in those cities where there was a Community Trust which had been sent a questionnaire. In each city where there was a Community Trust that had received a questionnaire, there was also a Community Chest and a Community Welfare Council. In those cities where it was determined that one individual served as the executive for both the Chest and Council, a single questionnaire was forwarded. A total of forty-two questionnaires were forwarded to these executives, and twenty-six completed questionnaires were returned.
THE COMMUNITY TRUST QUESTIONNAIRE

A statistical summary of the results of each question on the Community Trust questionnaire is presented herewith, together with some of the more significant comments that were noted for each question.

II The Community Trust Executive

1. Indicate the employment status of the executive of your Community Trust:

   (1) Single executive

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   (2) Full time Part time No answer

   |   |     |       |
   | 9 | 14  | 0     |

   (3) Paid Unpaid No answer

   |   |     |       |
   | 12| 10  | 1     |

2. Does the Director or Secretary of your Community Trust hold any salaried position with:

   (1) Community Chest

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   Positions held in the Community Chest by those answering yes:

   1 - Associate Director
   1 - Executive Secretary
   2 - Combined Chest-Council Executive

   (2) Community Welfare Council

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(3) Other agency

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Positions held in other agencies by those answering yes:

2 - Serve as Secretary of private foundation

III

1. Is there any other relationship between the Community Trust and the local Community Chest and/or Community Welfare Council, either personal or organizational? If so, please explain.

Some degree of personal or organizational relationship between the Trust and these agencies:

15

No relationship between the Trust and these agencies:

8

**Significant Comments**

The Executive Director (of the Trust) is on the Board of the Welfare Council and members of the Executive Committee are on the Boards of both Welfare Council and Chest...very amicable working relationships with both organisations.

The President of the Community Chest (elected annually), is, ex-officio, a Director of the Foundation.

Friendly and cooperative relationship. Secretary of the Foundation finishing term as Chairman of the budget committee of United Fund.

Accidental overlapping of Boards...

...The Director of the Foundation serves
on Chest and Council budget, planning and special study committees.

...The distribution committee is almost entirely the capital account committee of the Chest.

...Customary through the years for the Director of the Foundation to participate actively in the Community Chest campaign.

Executive (of the Trust) was instrumental in forming the Community Chest...has held many positions in connection with it and is now President of the United Community Services.

President of the Chest...appoints one member of the distribution committee of the Foundation.

...No more than helpful relations with all welfare groups.

There is always a relationship between the Community Trust, the Community Chest and the Welfare Council...

Community Trust has made a contribution to the Community Chest in each of the last three years.

...President of the Chest appoints one of the five members of the distribution committee.

2. What evidence is there that the Community Trust was an outgrowth of the interests of persons actively associated with the local Community Chest and/or Community Welfare Council?

No evidence, since the Community Trust was formed before the Community Chest and/or Community Welfare Council was organised.

No evidence.
Some evidence of Community Chest and/or Community Welfare Council support and leadership in forming the Community Trust.

6

Significant Comments

Most of the members of the exploratory committee which established the Foundation were identifiable as past presidents or directors of Community Chests.

The Community Chest was responsible for organizing the Community Trust.

Community Trust was recommended by the Council, organized by Chest's capital accounts committee personnel.

Chest "industry" members organised the Community Trust.

None. Trust grew out of the ______ Corporate Fiduciaries Association.

The ______ Community Fund was organized largely as a result of a survey financed by the ______ Foundation.

None. The Community Trust antedated the Chest by twenty years.

Little evidence. Initiative came from members of Board of Trustees of ______ (private) ______ Foundation.

IV

1. (a) Indicate briefly below, any surveys or research projects that your Community Trust has co-sponsored or cooperated in, with the local Community Welfare Council.

Indicated that Trust had cooperated with Council on projects such as these

8

Indicated that Trust had not cooperated with the Council on projects such as these

10
No answer.

5

**Significant Comments**

The Community Trust has helped finance surveys and research projects.

...The Foundation has financed...a community-wide committee on problems of the aged...a survey of hospitals and health facilities.

From 1919 to 1945 the Foundation maintained an extensive program of social research...In 1945 it transferred all its research activities to, and assisted in the establishment of, a research department in the Council of Social Agencies.

Foundation financed a study of Public Assistance...a study of settlement houses.

Research on a foster home program for the aged...Demonstration project to secure services of a professional worker to recruit and train housekeepers for families on a casework basis...Study of need for day-care program for children...Study to coordinate the work of three major social service centers in the North End...

(b) Did this cooperation take the form of a money grant from the Community Trust for the project? If so, please indicate the number and total dollar value of grants made for each project and the percentage of the total cost borne by the Community Trust.

(Note: In examining the replies elicited by this question, only those answering Question IV. 1. (a) above were tabulated. Only three of the Trustees enumerated the dollar value of individual grants, but a majority indicated that the Trust had borne the total cost of the project.)
2. Has your Community Trust supplied funds for any pilot or experimental agencies that were initiated or co-sponsored by the local Community Welfare Council?

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If so, please indicate the total dollar value of each grant and the number and percentage of the total cost borne by the Community Trust.

(Note: In the replies elicited to this question, the results were so fragmentary as to be insignificant. Most of the responding Trusts indicated that, while they had supplied funds for projects such as these, they could not take the time to supply all the dollar amounts or percentages required.)

3. To what extent does your Community Trust participate in joint planning with the local Community Welfare Council?

- **To some extent**
  - 9

- **None**
  - 11

- **No answer**
  - 2

**Significant Comments.**

No formal relationship, but to a considerable extent through informal consultation, and by virtue of the fact that both the Executive Director and members of the executive committee serve on the (Council) Board and on various committees.
Only to the extent of the Director's participation in activities of the Health and Welfare Council.

To the greatest extent possible by means of informal consultation, and through membership on the social planning committee (Council).

Whenever necessary.

Often requests and receives reports from Council of Social Agencies. Not so much joint action.

Relates more closely with Chest Budget committee, but even this is on an informal basis.

V

1. Please indicate the number of Community Chest agencies to whom your Community Trust has made grants for capital improvements and the dollar value of these.

A considerable number ¹)

9

Some grants have been made

4

None

5

No answer

5

2. Indicate the number of Community Chest agencies

¹) In analyzing the replies to these questions, the total dollar value of grants made to Chest agencies was compared to the overall dollar value of grants made during the year. Where grants made to Chest agencies approximated over thirty per cent of the grants made for one year, this amount was considered to represent a "considerable number". In cases where grants to Chest agencies amounted to from one to thirty per cent of the total annual grants of the Trust, this amount was considered to represent "some grants".
to whom your Community Trust has made grants for operating expenses, and the dollar value of each grant.

A considerable number

9

None

9

No answer

5

3. Indicate any newly-established social work agencies to which your Community Trust made an initial grant, and which subsequently became a Community Chest agency.

Some grants made  None  No answer

5  12  6

4. Describe briefly any other grants that were made by your Community Trust to the local Community Chest, and if such grants were made for a designated purpose, please state the purpose.

Made grants to the Chest campaign

6

Made miscellaneous grants

4

None

8

No answer

5

VI

1. Indicate the extent to which your Community Trust has made grants for educational purposes or scholarships to individual persons.
Have made grants for scholarships

17

No grants made for scholarships

4

No answer

2

Significant Comments

Scholarships are not granted directly to individuals, but funds have been granted to organizations for the purpose of individual scholarships, totalling approximately $198,000.

Our scholarship program is very extensive. We administer three separate scholarship funds and as of October 31, 1952 had 138 young men and women in colleges, universities and nurse's training institutions. Our scholarships for the present year will be slightly under $90,000.

For the last several years, an average of approximately twenty per cent of the Foundation's disbursable funds have been expended for educational purposes.

Approximately $75,000.

The income from a $400,000 fund will be used for medical scholarships.

The Foundation has provided aid for undergraduate college of medical education to approximately 428 students, including 30 current recipients.

...We have certain funds for scholarships that are made only to educational institutions. We never choose the scholars ourselves.

No scholarships given directly to individuals, but the principal part of income is designated to University for scholarships.
2. To what extent has your Community Trust provided grants for:

(a) Schools
(b) Libraries
(c) Private, non-Community Chest agencies
(d) Organizations of a service nature, not primarily social agencies, i.e., Lions, Rotary, etc. for social service purposes
(e) Colleges
(f) Religious organizations

(a) Schools

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(b) Libraries

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(c) Private, non-Community Chest agencies

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(d) Organizations of a service nature, not primarily social agencies, i.e., Lions, Rotary, etc. for social service purposes.

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(e) Colleges

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(f) Religious organizations

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VII

1. What is the policy of your Community Trust toward new or experimental social work projects or agencies?
Generally receptive

12

Only receptive if vitally necessary

1

Not financially feasible to consider at this time

4

Grants limited to other purposes

5

No answer

1

Significant Comments

Always ready to consider them for possible support.

We are always glad to investigate and to consider new or experimental projects.

Favorable.

Generally sympathetic. Various of such (projects) have been given aid by the Foundation.

We feel that one of our chief functions is to help new projects and studies so as to prove their worth, after which the community should support them.

We are continually evaluating the private charitable undertakings of the community and are always receptive to suggestions from the Welfare Council...

All our income is distributed through existing agencies except 'Funds' established by individuals for specific purposes.

With existing agencies taking budget cuts and facing ever-increasing expenses, new projects are considered only if they are recommended by planning groups as vitally necessary...and have a reasonable plan for permanent financing from other sources.
Grants made from the _____ Foundation for non-recurring articles of equipment or property rehabilitation.

Up to this time have not contributed to any such programs.

2. Has your Community Trust taken the initiative in setting up any studies or experimental projects?

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**Significant Comments**

Yes, many through the years.

Mental hygiene clinic for children in 1927.

Yes, on various occasions.

We have at times given money for studies in public and private agencies.

No. We do not consider our Foundation adequately staffed to take the initiative.

3. Does your Community Trust take any direct responsibilities for the supervision of any of its projects or studies? If so, please explain.

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**Significant Comments**

Yes. In the first instance by being satisfied that the researchers and key staff are probably competent to carry out the assignment. Later through informal conference and discussion.

No, but require a complete written report on the completion of each supported project.
No responsibility other than to see that the program is being carried out in accordance with the original understanding. We exercise no supervision over personnel or administration of the program.

No. We grant only to organizations which we consider well able to manage their own affairs.

Generally not. If we cannot place confidence in the applicant's ability to supervise or direct a project, the grant would not be made.

No, however we insist on an accounting of the use of grants.

4. In what areas do you feel that the relationship between your Community Trust and the local Community Chest and/or Community Welfare Council might be strengthened?

Believed there are areas of relationships that need strengthening

Believed that the present relationship should not be strengthened

No answer

Significant Comments

A larger Community Trust, in terms of funds, would be in a stronger position to aid the Chest and its agencies.

None, except the investigation of endowment fund drives contemplated by several social service agencies, which in some instances might have the Community Trust designated as the recipient of funds with special purposes of such funds designated by donor or testator.
Because of the close tie-up over the years since the Community Chest was founded...I can think of no way it could be strengthened.

Should not be strengthened. There's such a thing as over-organization. This whole country has gone overboard in that direction. Community Trusts such as our Foundation have completely different aims from those of welfare boards. Most incidentally, some charitable organizations receive financial benefit from Foundation accounts, where the donor of the trust has so provided. Our Foundation provides the means of doing many things for the community which could never be done in the name of charity and leaves charitable work and planning to organizations formed for that specific purpose.

Think the relationship is good, probably as close as it should be to preserve the autonomy of the distribution committee.

I am not at all sure that there should be any formal, organizational connection between the Chest and the Foundation. There should, of course, be full cooperation and understanding between them.

Relationship is healthy and helpful.

The Foundation is still young and small and needs assistance in getting itself known and understood. It does not wish to promote itself. It is not competing for funds; it is a facility for the benefit of the existing charitable agencies and the community; it is a means of fulfilling the wishes of the donor.

Our relationship with the Council of Social Agencies and the Chest has been close and cooperative. The relationship which needs strengthening is the one between the Community Trust and other foundations, particularly family foundations.

Relationships between the Community Trust and the Community Chest are quite good; members of the distribution committee are also on member agency boards of directors, and have a good understanding of Chest and agency programs.
Before concluding this report of the findings of the Community Trust questionnaire, it might be of interest to note that some of the executives of the responding Community Trusts appended a letter to the completed questionnaire. Certain of these letters contained additional information concerning the pattern of relationships of the Trusts with the Community Chest and Community Welfare Council. Portions of these letters are reproduced below:

"...Recently industrial corporations have been given a quiet opportunity to make direct and unrestricted grants...Such sums have been allocated to local agencies for capital purposes. We regard this as only a small beginning of what could develop into an important resource for capital needs not covered by the annual grants from the Chest.

"There has obviously been a great reluctance to do anything in the way of 'promotion' of the ______ Foundation. Its officials have perhaps felt that such business might appear undignified or be regarded as competition to the Chest. It has also lacked active leadership over the years. There is needed a carefully planned and continuous effort to interpret the Foundation to the public and particularly to attorneys, tax consultants, etc. Whether or not this will be done depends on the attitudes of the Foundation leaders who do not now seem to favor it."

"...The only attention which is paid to the Community Welfare Council or to the Community Chest is to make certain that there is financial need in the organizations with the Chest, which receive donations from some Foundation account. I, personally, am for keeping community welfare activities as completely divorced from the Foundation as possible, and also, I believe this is a fair statement of our Foundation's policy..."
"...The presence of a Community Trust or a Foundation in a community can be extremely valuable, particularly in relation to the demonstration of specialized services, and to conducting special research to determine needs for services..."

Evaluation of Replies to the Community Trust Questionnaire

In the hope of illuminating the picture of the findings shown above, the writer felt that it might be of some help to discuss and evaluate the answers elicited by the Community Trust questionnaire.

A preponderant majority of the trusts indicated that the day-to-day administration of the trust was lodged in the hands of a single individual, but only half of the individuals devote their full time to this job. It is notable that only three of the individuals who devote a part of their time to the Community Trust receive any payment for this service. In general, these individuals are not the paid, professional employees of the local Community Chest, the Community Welfare Council or any other social work agency. Since the administration of a trust is a somewhat technical job, it is logical to assume that many of these administrators are bankers, businessmen or attorneys. There is some evidence to indicate that in many cases, the administrators of Community Trusts are officials or employees of
banks or trust companies.

Turning to the organizational relationships existing between Trusts and the local Chest and Council, we note that some degree of organizational relationship is evident. This is usually in the inter-locking of boards of directors or trustees of these organizations; however, this does not seem to be deliberate or through design, but rather an indication that these individuals were selected because of their demonstrated concern with community welfare.

Due in some degree, to the fact that many of the responding Community Trusts were established prior to founding of the local Community Chest and Council, there is little evidence that the Trust was an outgrowth of the thinking of persons intimately connected with social welfare in the community. Although only twenty-six per cent of the Trusts indicated that any thinking contributory to the establishment of the Trust was stimulated by persons identified with the Chest or Council, it might be said that in every case, those answering this question in the affirmative represented Community Trusts that had been founded in the last decade. Therefore, there is some likelihood that those Trusts established in the future will represent to a large degree, the thinking of persons connected in some way with social welfare in the community.

The degree of cooperation between Community Trusts and
Community Welfare Councils in the area of research projects and surveys is not large. Of the Trusts responding, thirty-four per cent indicated that they had made grants or cooperated in some way with Council projects such as these. Similarly, it was found that only thirty-four per cent of the Trusts had supplied funds for pilot or experimental agencies initiated or co-sponsored by the local Council. Granting that in many cases the Community Trusts may not have sufficient undesignated funds with which to assist in this valuable type of work, it might be assumed that they would, at least, engage in some forms of joint planning with the local Community Welfare Council. In general, however, this assumption is not borne out by the replies elicited on this questionnaire. Thirty-nine per cent of these Community Trusts engage in some form of joint social welfare planning with their local Community Welfare Council. Little attention, then, is paid to this important phase of Council activity by a large majority of the Community Trusts which were questioned.

It is generally recognised, that in the provision of capital funds for social welfare agencies, the Community Trust can offer a modicum of assistance. The Trusts answering this questionnaire gave evidence that they recognised this as a part of their responsibility, and fifty-six per cent of the
Trusts noted that they had made some grants to Community Chest agencies for capital improvements. It is to be noted that a smaller percentage (thirty-nine per cent) indicated any considerable number of grants for this purpose. In the area of providing funds for the operating expenses of Community Chest agencies, we find that thirty-nine per cent of Trusts had made considerable grants for this purpose. Newly-established social work agencies do not, generally, seem to be beneficiaries of Community Trust grants; only twenty-one per cent of the cooperating Trusts indicated that they had ever made grants to such agencies that were subsequently to become Chest agencies.

Although the results of this study do not indicate any kind of close and effective cooperation among the majority of Trusts and Chests, some of the Trusts take an interest in the annual Chest campaign for funds. Twenty-one per cent of the Community Trusts stated they had made contributions to the Chest campaign, and an additional seventeen per cent indicated they had made miscellaneous, undesignated grants to their local Chest.

As might have been expected on the basis of the relationship pattern revealed so far, this study showed rather unmistakably that a considerable number of Community Trusts make grants available for educational purposes. Seventy-three per cent of the responding Trusts replied that they had made grants for
educational purposes and scholarships. In order to determine more specifically the nature of Community Trust grants, the questionnaire asked to what extent grants were made to certain social work, educational and service organizations. Briefly, the results of the completed questionnaires showed that:

Twenty-six per cent of the Trusts had made some grants to schools

Thirty-five per cent of the Trusts had made some grants to private, non-Community Chest agencies

Nine per cent of the Trusts had made some grants to organizations of a service nature

Forty-seven per cent of the Trusts had made some grants to colleges

Thirty-four per cent of the Trusts had made some grants to religious organizations.

In some evaluations of organizations, authorities have noted the attitude of the organization to new social work projects and studies, feeling that these projects and studies are evidences of what the community is doing to meet its welfare needs. Slightly more than fifty per cent of the Trusts stated that they were generally receptive to such projects. Perhaps this shows only the extent of available funds for these services, but it does point up the need for continuing interpretation to the Community Trust as regards the importance of these projects to the community.
Acting toward the setting up of studies and experimental projects has been a part of the program of about forty-seven per cent of the Trusts, thus indicating that this form of worthwhile activity was relatively popular with Community Trusts. Unlike some private foundations, Community Trusts do not often take any direct supervisory responsibility for the studies and projects that they underwrite. This is probably a reflection of the fact that only the largest Trusts have any full-time, paid staff, and could scarcely undertake any supervisory role. Generally, the Trusts seem to have complete confidence in the abilities of the agencies to which they make grants for studies and research projects.

The last question, asking the Trusts to indicate the areas of their relationship with the Chest and or Council that needed strengthening, was considered quite important when the questionnaire was compiled. Yet, the Trusts gave solid evidence that a great deal of concern is not given to problems of this nature. Only two of the responding Trusts (eight per cent) named areas of the relationship pattern that needed to be strengthened. Are the present relationships then, strong, effective and closely-knit? No one can certainly answer this question in a definitive manner, but the replies elicited to this questionnaire seem to indicate that relationships on the whole are rather weak and ineffectual, except in certain cities. From the knowledge of
Community Trusts gleaned from the replies to this questionnaire, it appears to the writer that Trusts are quite often smug and self-centered in their thinking, and pay little regard to the local Community Chest and Community Welfare Council. Their thinking does not embrace any conception of mutuality of aims or objectives with Chest and Council, and fails to recognize areas where these three community agencies might legitimately work in common accord toward meeting many of the social welfare needs of the community. This is not to indict all Community Trusts for the failings of some of their number, for as has been pointed out before, certain of the Trusts have made notable contributions to their home communities with the aid and counsel of the Community Chest and Community Welfare Council. If we subscribe to the fundamental tenets of democracy, there is no reason to believe that most of the rather uncooperative Trusts would not adopt a more conciliatory attitude toward their local Chest and Council if they were skillfully educated to the advantages of closer cooperation.

The Community Chest and Community Welfare Council Questionnaire

A statistical summary of the results of each question on Chest and Council questionnaire is presented herewith together
with some of the significant comments to each question.

2. Describe briefly the relationship existing between the Community Chest or Council and the local Community Trust.

**Generally satisfactory**

21

**No definable relationship**

3

**Unaware of Community Trust in the community**

2

**Significant Comments**

"Friendly cooperation exists between us."

"...work together in extremely close cooperation..."

"...Work closely together on new projects and requests for funds to begin new services."

"Very helpful relationship."

"Cooperative."

"The _____ Foundation was developed through the efforts of Community Chest and Council leaders. The Chest executive is the Executive Secretary of the Foundation. There is a very close relationship."

"...The Community Chest has no direct relationship with the local Community Trust... other than a friendly exchange of information and ideas at all times. It seems to be the policy of the _____ Foundation, however, to refer all matters which have a community planning aspect to the Welfare Council for study and report.... In addition, the _____ Foundation makes a small grant, never more than $200 (annually) to the Welfare Council for the maintenance of the library."
"...Excellent cooperative, although informal, working relationships between Council and Trust. Community Trust gives financial support to Council."

"The Trust has been very cooperative and has respected to a high degree the recommendations of the Council."

"Cordial and cooperative. The Trust Director is a leading layman in our Council activities; the Council staff feel free to consult him at any time on possible Foundation projects."

"There is practically no relationship..."

"None except Chest is recipient of some funds from Foundation..."

3. In what areas do you feel that this relationship might be strengthened?

Cited areas of relationship needing strengthening

?

No areas of relationship needed strengthening

13

Community Trust too newly-established to indicate what areas of relationship need strengthening

3

No answer

3

Significant Comments

"In view of the substantial lack of relationship, they, of course, could be strengthened at all points... The Disbursing Board... is quite satisfied with its policies and does not feel, nor can it be shown, that there would be any point to making any change. Its policy is to make non-recurrent allocations principally for equipment and building repair purposes..."
"Current unmet or potential community needs might well be channeled to the Foundation Board at its request and at established periodic intervals."

"I believe formal Council representation on the Foundation would be desirable."

"Participation of Foundation in Council of Social Agencies and Budget Committees of the Chest."

"It may be that a written agreement between Council and Foundation would tend to strengthen relationships."

"By seeking Council aid on non-Chest projects and by enlisting more bequests and gifts."

"The relationship is about as nearly perfect as could be."

"We think it is all right as it is."

"I can't see how it could be stronger, given the present Trust Director."

"I would be at a loss to say in what way our relationships could be strengthened, as they are most satisfying."

4. In what areas do you feel that the organizational structure of the local Community Trust might be changed in order to make it more effective?

Suggested organizational changes

8

No suggested organizational changes

13

No answer

5

Significant Comments

"If the _____ Foundation could be made a multiple-trustee foundation so that all ___(city)___ trust companies would be represented by one trust."
"By formalizing a plan whereby major community
groups related to scientific, social and cultural
development could be represented and encouraged
to make available to the Foundation Board their
recommendations and needs."

"The _______ Foundation has been in existence for a
number of years, but operates along very conservative
lines. It has limited funds to distribute and
maintains no employed staff. A more aggressive
policy in securing bequests would be a more important
matter from my point of view."

"Should have a Board of Directors."

"The _______ Foundation would be strengthened, I
think, a great deal if it were a multiple-trustee
Foundation, instead of a single-trustee Foundation.
The _______ Bank is the sole trustee of the
corporation and the result is that trust officers
of other banks, as well as lawyers connected with
other banks, naturally do not encourage their
clients to leave money to the _______ Foundation."

"I believe it (Foundation) has reached a size where
it needs a salaried executive to assist it in
intelligent allocation."

"We are currently working out a plan to bring the
leadership of the Trust into an association with
the numerous industrial trusts and foundations in
the community."

"The _______ Foundation is incorporated under the
laws of the state and several members of the Board,
such as the mayor of _______ and the Chief Justice
of _______ are automatic appointments. In addition
to these members, the Board is perhaps rather small
and at some stage in its development it might seem
desirable for the Foundation Board to have wider
membership."

"I think the Trust here has a good organizational
structure. It is only a few years old, is steadily
accumulating funds, provides for a broadened base
of giving. For a community of this size it is
ideal. Is limited only by its amount of funds."

5. Assuming that your city had no Community Trust or
Foundation, do you feel that either the Community Chest or the Community Welfare Council should take the initiative in helping to establish such a Trust? Why?

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<th>Yes</th>
<th>Probably</th>
<th>No</th>
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**Significant Comments**

"Yes. The Foundation facilitates effective use of large sums of money which might otherwise be lost through ill-advised expenditures. The close relationship between the Foundation and the local planning and financing bodies makes for more effective total community planning."

"We were quite interested in the development of the ______ Foundation as an idea and Chest people assisted in the organization... We would no doubt provide the same assistance again."

"It (the Foundation) is a most sound method of financing some of the things the Chest and the public agencies have not been able to touch—capital building expenses, scholarships for training, experimental projects aimed at prevention and rehabilitation. I think if we did not have one, the Chest or Council should take the initiative..."

"Yes. A city of our size needs a vehicle through which bequests can be made to further the development of health and welfare services. This is particularly true in the 'pilot' or demonstration program. From a practical, money available, point of view, it also channels funds into health and welfare services which would probably be lost to use without a Community Trust, in some form or other."

"Either or both may, since the objectives are to some extent related and similar, and presumably those associated would be civic-minded and interested in the welfare of the community."

"I certainly feel that a Community Trust is a useful and valuable asset in the social welfare field and I
am inclined to believe that it should be an organization quite separate from the Chest and Welfare Council, although certainly if there were no Community Trust, I would feel the Chest and Welfare Council should work to have one established."

"Yes, providing its governing board (Foundation) is aware of community needs, and the Council has a part in developing studies on which grants are based."

"The Council could well take initiative to study, plan and get action on formation of a Community Trust."

"Chests and Councils are logical groups to do or offer this service."

"Yes, I believe Chest or Council should take the initiative in such a matter. The community Trust... remains flexible to changing needs... provides the small trust with the same kind of intelligent supervision which ordinarily is only possible for large trusts... Mobilizes substantial sums so there can be a genuine impact on social problems."

"Yes. A multiple-trustee foundation obviously is a good way to bring together philanthropic bequests and route them into sound uses. This is quite consistent with the purposes of both the Chest and the Council."

"Yes. Trusts are an effective means of diverting surplus funds in prosperous years to the support of health and welfare on-going programs in years of economic tightness. Where there are no Trusts, Chests should either work for this creation or establish trust machinery within their own framework."

"No. Greater acceptance and support coming from other auspices."

6. Do you consider the Community Trust or Foundation in your city to be a valuable and effective asset in the development of community services and/or community organization?

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<th>Moderately so</th>
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"Very much so. Although it is relatively new, the Foundation has made real progress."

"Definitely. Their activities, although new and limited, have stimulated services, training and ideas not generally found in this area."

"Yes indeed. Our Foundation, we are glad to say, has placed a good deal of emphasis on making grants:

(a) for non-recurring expenditures

(b) for those perennial expenditures which are thoroughly approved by the Welfare Council, hence the Welfare Council is usually ready to take up the financial support of such projects after a demonstration period."

"Yes, we certainly do. It is intelligently managed and is a constructive influence on social welfare development."

"It has been and as its Board includes more and more people with a background of Chest and Council experience, its value has increased."

"Yes. With additional community support in securing more funds in trust, and a continued close working relationship with Council and Chest, it has even greater potential."

"Yes, the Foundation has been instrumental many times in providing a measure of financial help that has started new programs on experimental basis."

"Yes. It would undoubtedly develop in value and effectiveness with experience, wider understanding and greater availability of expendable funds."

"I wouldn't want to say the Community Trust has not done some good. The agencies which have received grants for such things as typewriters, program equipment, heating systems, etc. have doubtless been appreciative of the help they have received in that way."
"No. It could be if re-organized."

"Yes, but I have this comment in connection with the operation of our Foundation. Up to this point...the management and successive Boards of the Foundation have been very much concerned with building up the capital fund and have done this very successfully. Each year the income is distributed with a view to giving support to preventive social work, pilot projects, etc. and to this extent, the operation is very satisfactory. However, some of us feel that there should be more flexibility in the manner of use of capital funds, and wonder whether or not all Foundations should not be required to provide for some disbursement of capital for special purposes which require that sort of financing. For example, we see the proceeds of substantial estates going into the _________ Foundation, where only the income is used, although it may be directed to be used for the benefit of a particular agency. Often, the agency is one which, had the estate gone direct, would have been able to use part of all of the capital in some very or other development able when the money

A few of the executives of the Chest and Councils which replied in the form of the questionnaire included a letter with their completed questionnaire, a portion of some of these letters are reproduced here in order to shed some further light on the situation in certain communities.

"...Now that the annual disbursable funds are running around $100,000 I feel (and I'm sure a number of other observers in the community feel) that there could be much more valuable use made of the allocations which the _________ Foundation makes from year to year. Frankly, the attitude of the Foundation, I think, is considerable comparable to the well-known Lady Bountiful attitude. I think that the people that are responsible for disbursing
funds get a great kick out of meeting some acute pressing need for a television set in a boy's club, for example, or a desk in another agency, and things of that kind."

"...I would like to make the comment that the presence of a Community Trust or Foundation in a community can be extremely valuable, particularly in relation to demonstration of specialized services and to conducting special research to determine needs for service. With that in mind I should think it would be an advantage to any Community Chest or Council to assist in developing such a Trust where one does not exist, and to begin establishing relationships where one does exist."

"(city) does not have a Community Trust in the usual sense. We have the ______ Foundation which does provide grants for various types of community projects. The Foundation is actually a common facility for handling distribution of grants which has been organised by a few families and industrial concerns here. Apparently it does not make a very strong attempt to add to its capital or to get additional individuals or organisations in the community to use the Foundation as a channel for their giving... The Foundation has been responsive to a number of requests coming from the Chest and Council. Contacts with the organization usually involve informal discussion with several members of the Distribution Committee followed by the submission of a fairly brief statement regarding the individual request involved if the Foundation seems interested.

"The ______ Foundation is an asset in this community and to our knowledge the projects the Foundation has supported represent a wide range of useful and effective programs. However, to fulfill the overall responsibilities of a Community Trust it seems to us that a more concerted effort to obtain additional capital would be helpful, that more formal arrangements might be worked out with the Chest and Council regarding methods of distribution of funds, and that some more complete long-range planning might be advisable in considering ways in which these funds might be most effectively used as part of an integrated plan for community development. The suggestion has been made to the Nominating Committee of the Welfare Council that one of the members of the Distributing Committee of the ______ Foundation be elected to the Board of Directors of the Community Welfare Council, at our annual meeting next April. This move certainly has
merits, in that the Foundation is providing the Council with almost 10 per cent of its budget."

"It is difficult to contemplate organizing the right kind of Community Trust in ________ under the present circumstances.

"The present Foundation disburses its money in small amounts to a large number of agencies, mostly for equipment. It does not go in for supporting community studies or anything of that kind.

"Our Community Chest has a friendly but informal relationship with the Foundation people. We have a peculiar local situation as you will understand from this...it is quite difficult for us to take the initiative except by a long, slow process of personal suggestions here and there, which may some day result in a rounding out of the present Trust or the organization of a truly community-wide trust.

"There are a large number of small individuals and business foundations here, as everywhere, and the tendency seems to be more in that direction at present. I am not sure but what from a practical point of view a development of corporation Foundations may be the thing we should work hardest on just at the moment. At the same time the long-range objective should be the development of a community-wide organization with broad participation, which would have really sound long-term objectives in terms of studies and research as well as practical day-to-day support of on going programs."

EVALUATION OF THE REPLIES RECEIVED TO THE COMMUNITY CHEST AND COUNCIL QUESTIONNAIRE

A critical evaluation of the replies received to the questionnaire forwarded to Community Chests and Community Welfare
Councils, in those cities where there was a cooperating Community Trust, reveals certain interesting facts.

An overwhelming majority of the Chests and Councils felt that the relationship that they have with their local Community Trust is generally satisfactory. As we have previously determined that the degree of cooperative relationship is not great between these three community agencies, it is possible that, in general, the Chest and Council executives were hesitant to be critical of the relationship, feeling that if they were, this might be a reflection on their own administrative qualities. Perhaps, too, these executives may not have given much thought to the problem of how these relationships might be made more meaningful.

Since only twenty-six per cent of the responding Chests and Councils indicated areas in which their relationships with the local Community Trust might be strengthened, it must again be assumed that the present pattern of relationships is generally viewed with satisfaction by these agencies. Another reflection of this attitude is seen in the answer to Question Number 4. Less than one third (thirty per cent) of the Chests and Councils suggested organizational changes that might make their local Community Trust more effective. Conceivably, this may be a manifestation of actual knowledge of the organization of the local Trust, however we cannot make this assumption. It is of
particular interest to note the comment of one Council, regarding the broadening of the base of representation on the Board of Directors of the Community Trust. Innate conservatism and the single-trustee plan of organization also were criticized.

The executives of most Chests and Councils seemed to feel that if there were no Community Trust in their city, one or the other of their agencies should work for the establishment of such a trust. Indicating their general agreement with this idea, seventy-three per cent of the executives answered "yes" to this question. It therefore appears that they feel rather positively that this type of organization is of benefit to the community. In amplifying their answers to this question, the executives demonstrate their faith in the philosophy behind the Community Trust, and give a clear indication that they appreciate the unique and valuable role that a Community Trust can play in the social welfare activities of a community.

Bearing out their feeling that the Community Trust in their city was a valuable and effective asset in the development of community organization, seventy-three per cent of the responding Chests and Councils indicated that they were in agreement with this basic premise. An additional seven per cent of these executives gave evidence that they felt that the Community Trust in their city was a moderately effective asset
toward the development of community services, thus there is little criticism of the Community Trust on the part of the local Community Chest and Community Welfare Council. Only in a minority of the questionnaires did the respondents have extensive criticism of their local Community Trust. In general, it is felt that the amplifications of these executives to the questions posed, are especially significant, for they paint a more detailed and precise picture of the local pattern of relationships between the three agencies.
SUMMARY AND CONCLUSIONS

In the process of making a rather detailed study of the Community Trust movement in the United States and Canada, the observer becomes increasingly aware of certain facts. The movement has not been uniform in the usual sense, and generally, it might be said that few trusts have lived up to the rosy expectations that were engendered at their inception. Knight\(^1\) concluded that only about one-fourth of the Community Trusts were financially successful. The results of the current study seem to indicate that the successes of the Community Trusts in social welfare have been erratic. Some trusts have been quite successful in integrating their overall program with those of other social work agencies in their cities. Others have been hampered by a lack of funds, or more specifically, a lack of undesignated funds, and regardless of their well-intentioned aims, they have made a very small contribution to social welfare in their own community. A few are narrow and selfish in their outlook, and do not care to be identified with any social work agency in their city.

Although it may be presumptuous for the writer to engage in any analysis of factors that have been contributory to the unevenness of growth in the Community Trust movement, certain conclusions seem to stand out when we examine their history and present relationships with other social work agencies in their own communities. The factors that are here presented do not represent all the forces that have worked against the growth and development of any particular trust. Neither may we be assured that if these factors were remedied or modified, a successful trust might replace an ineffective trust. Each community is an entity unto itself, and as such, is deserving of individual and unique consideration. With this in mind, a brief critique of the organizations and methods of the present-day Community Trust is offered herewith.

(1) Community Trusts have, in a broad sense, not realized the value of seeking closer cooperation in their relationships with social work agencies, especially Community Chests and Community Welfare Councils. These agencies are the ones that are most likely to have a clear and unbiased picture of social work in the community, yet Community Trusts have not seen fit to integrate their thinking to include these agencies in planning.

(2) Only in a few cities have Community Trusts exhibited any evidence of a sense of public relations. For this reason, the trusts are not widely known in their own communities, and potential gifts and bequests are lost through public ignorance of the trust. Generally, it seems that the Directors or Trustees have looked upon any kind of publicity as undesirable.
(3) Most Boards of Directors and Trustees of Community Trusts are not truly representative of all elements in the community they seek to serve. In a preponderance of cases, these administrative bodies are heavily weighted in membership toward banking and commercial interests. Women, labor representatives, the clergy, and representatives of the 'managerial' class are conspicuously absent from most of the governing groups of Community Trusts.

(4) Although it would not be financially sound for many of the smaller Community Trusts to hire an executive, it appears that these small trusts have suffered from the lack of skilled and continuous direction. Obviously, these men serving on boards and committees can devote only a small part of their time to the work of the trust; yet, a Community Trust that is progressive and community-minded, needs continuous direction. A part-time Director who is receiving some pay would, in many cases, be more effective than no Director.

(5) Those Community Trusts that are administered by a single bank-trustee have not gained public acceptance for the reason that they have been looked upon as a closed corporation. This plan has also served to arouse jealousy and suspicion on the part of other banks, trust companies and attorneys, and resulted in adverse public comment.

(6) In too many cases, the Community Trust has failed to define in any specific terms, its program, its objectives and its long-TERM goals, which relates somewhat to public relations policy, but also has a bearing on its demonstrated worth to the community. There are many instances in which a Community Trust was organized by a tight coterie of men, who then sat back to wait for the arrival of gifts and bequests without presenting to the community any outline of future plans or objectives.

(7) Only a few Community Trusts have actively solicited gifts from corporate donors, or told their story in such a way that this potentially large group of givers might be inclined to support the trust. For various reasons, Community Trusts do not seem to have been successful in encouraging small donors,
although gifts and bequests of even $1,300 might be used effectively in any community.

(8) In a sense, some Community Trusts seem to feel that they are in competition with the Community Chest in their community for gifts. Although this is a reflection of some confusion in thinking, the very fact that this feeling exists points out the lack of any close working relationships between the two agencies.

Primarily then, the writer feels that Community Trusts have not been particularly effective in providing for the social welfare needs of their communities. Recognising this fact, a few Community Chests have set up Foundations within their organizational structure which operate in the same manner as do Community Trusts. The most notable of these is the Trust established by the Rochester, New York Community Chest in 1927, and which now has funds totalling approximately $1,500,000.18 These funds are administered by a Trust Committee which is responsible to the Board of Directors of the Chest. Although the Trust Fund will accept gifts for designated purposes or agencies, it encourages donors to make outright, general purpose bequests or gifts. The income from these sources is distributed for general social welfare purposes.

The idea of a Community Chest Fund or Foundation has received some encouragement in recent years, however, the writer is of the

opinion that, generally speaking, it is more advisable for a Community Trust to be separate and distinct from the Community Chest. The establishment of such a Foundation within the Chest might result in some justifiable criticism that the Chest was building a kind of monolithic superstructure for social welfare in the community. There would, almost certainly, be some degree of misunderstanding on the part of the public, regarding the separate function of this new arm of the Chest. Conceivably, a long-range and intensive program of interpretation might serve to overcome these handicaps. It would, therefore, seem easier to establish a trust outside of the organisational structure of the Community Chest, and thus avoid the misunderstandings that might arise.

In those communities where the Community Trust, the Community Chest and the Community Welfare Council are presently existing, it is, perhaps incumbent upon both the laymen and the professional staff of the Chest and Council to work for better and closer relationships with the Community Trust. A few suggestions as to how this might be done are offered herewith:

(1) There should be a meeting of the Directors of the Chest, Council and Community Trust, together with the professional staffs of all three agencies. At this meeting, it is proposed that the mutuality of purpose of these agencies be examined, and steps taken to effect the appointment of a joint committee to explore this area further. Manifestly, those persons connected with the Chest and Council would have to exercise the greatest tact and caution to avoid the appearance of 'taking over' the Community Trust.
(2) Once the joint committee has begun its work, it is to be hoped that its deliberations will result in a more congenial atmosphere, and the slow, but unmistakable awakening of the idea that those connected with the Chest and Council have something to offer to the Community Trust, and that a closer working relationship is desirable.

(3) In time, it is also to be hoped that the joint committee will make a report of its recommendations, and will see the need for closer relationships between these three agencies of social welfare. At this time, the governing bodies of the three agencies will have to act, in order to carry out the recommendations.

(4) As soon as it is practicable and wise, the Chest and Council should offer whatever staff they have available, to help with the formation of a positive and far-reaching program of promotion and public relations for the Community Trust. Conceivably, this program could be best implemented by the appointment of a committee, composed of attorneys, bank and trust company officials and persons employed in the journalistic fields.

(5) Possibly, there may in time, be some interlocking of boards between these three agencies, which should encourage closer cooperation; however, this situation should probably not come about through design on the part of those connected with the Chest or Council, but from public recognition of the broad similarity of objectives of the three agencies. Rather than strive for interlocking of board membership, it would seem that those working in the Chest and Council should endeavor to see that the representation on the Board of Directors and the Distribution Committee of the trust become more broad and community-wide in scope.

Undoubtedly there are many ways in which the Community Chest and Community Welfare Council can aid the Community Trust in becoming a more valid and effectual instrument of community welfare. These ways, must of course, be adapted to the situation in the individual community. The most important single factor in bringing
about a closer relationship between these three agencies, seems to be a meeting of the minds, and a frank and friendly discussion of mutual aims as they relate to the whole community. Certainly, the Community Chest and Council can offer a great deal of aid and service to a Community Trust, but it must first sell the trust on the idea that these services will result in the strengthening of the trust and its program.

To the city that has no Community Trust, a few suggestions might be offered to guide thinking on whether such a trust should be established. Naturally, a community wants its trust to be a dynamic and forceful institution, with some capacity for accomplishing things in the community. Therefore, any community that aspires to establish a Community Trust should examine in some detail, the climate and conditions in which it proposes to set up a trust. If there were such a thing as a scale of social welfare maturity for communities, we would find that certain cities, large and small, exhibit a high degree of awareness of community social work needs. These needs may not all be met, but the community is actively engaged in examining its problems and endeavoring to do something about them. This type of community supports an adequate Community Chest, and has a Community Welfare Council that is active in developing social welfare resources in the city, surveying the current situation in the city, and planning to determine future needs. On the other hand, we should see
communities in which there is a low degree of awareness of
the problems of social welfare. The Community Chest is
unable to meet the funds necessary to carry on a well-rounded
program of social work, and the Community Welfare Council, if
any, is weak, ineffective, and perhaps lacking in direction.
The amount of lay leadership in social welfare activities is
small, and on the whole, the community is ignorant of the
objectives of its social work agencies.

We recognize that many of the older Community Trusts were
founded before the Community Chest or Community Welfare Council
was established in those communities, however, the situation
is different today, and we see almost every city with a
population of thirty thousand or more, supporting a Chest, and
in some cases a Community Welfare Council. The individual who
is acting as the executive of the Chest and/or Council is,
perhaps, the logical person to stimulate community thinking in
regard to a Community Trust. First, though, he must make an
objective evaluation of his community and try to determine its
position on the scale of social welfare maturity. If he cannot
honestly place his community at or beyond the mid-point of the
scale, it is doubtful if the city would support or understand
the objectives of a Community Trust. Assuming that the community
is sufficiently advanced in its thinking regarding social welfare,
there are some other considerations that must be made. The Chest or Council secretary must determine through personal contact with the members of the Board of Directors, bankers, attorneys and business and professional men, whether there will be lay leadership to spearhead the establishment of a Community Trust. It may be that he will find that it is necessary to plant the idea in the minds of these men and cultivate it for a year or two before there is general receptivity to the plan.

If, then, the Community Trust is to be established, the Chest or Council executive will need to know more about how Community Trusts operate, and would do well to solicit the aid of The National Committee on Foundations and Trusts for Community Welfare, which maintains offices in Chicago. He would also want the aid of some of the executives or directors of some of the more successful trusts, and would find them quite willing to advise and counsel him on the establishment of a new trust.

In establishing the organizational framework of the new Community Trust, it is probably advisable to secure as wide a representation of community groups as is possible. Certainly the memberships of the Board of Directors, the Distribution Committee and any other committees should include both men and women who will be appointed by public or semi-public officials. It is, of course, assumed that the trust will use the more effective, multiple-trustee plan, and thus place on the Trustees
Committee representation from all the banks and trust companies in the community. Generally, in order to impress the public with the idea that the Community Trust is an independent and unique vehicle for social welfare, it is probably wise to make sure that the lay representation on the trust is not weighted too heavily in favor of individuals who have, in the past, been closely identified with the Community Chest. Primarily, care should be taken to select only those persons with some knowledge of social welfare in the community, and a demonstrated ability to work effectively for the good of the entire community.

At the time of the establishment of the Community Trust, or soon afterward, it should be the organization's goal to secure some sizable gift or bequest, possibly $5,000 to $10,000. By this means, through its public relations program, the trust can inform the public that the Community Trust is now in operation, and explain its functions and objectives. Obviously, any organization cannot exist for a great length of time if it has no funds and no definite prospects of receiving any. With the receipt of the initial gift or gifts, the trust should begin a continuing and positive program of public relations aimed at the general public, the attorneys in the community and the banks. By means of brochures, annual reports, word-of-mouth publicity and publicity releases, the story of the Community Trust should be carried to every citizen.
The growth of the Community Trust may be slow, but it is hoped it will be steady. As its funds increase, its grants to community agencies will become larger, and it will become an increasingly useful instrument in the hands of those who are sincerely interested in meeting the needs of the community.

Speaking of Community Trusts and Community Chests, Raymond W. Hilliard noted recently that

A Community Trust, and a Community Chest as well, can enlist interest and support particularly from men of wealth, the men of business, the men of industry, and the men of professions, by assuming a position of leadership in a new and dramatic effort to meet the increased welfare and health needs of the future through voluntary philanthropy rather than through government.19

There seems to be little doubt that Community Trusts, in general, could utilize the resources of their local Chests and Councils to a much greater advantage. In those cities where there is a high degree of cooperative effort between these three agencies of social welfare, the resulting accomplishments speak for themselves, and have redounded to the good of the community.

It is hoped that Community Trusts, Community Chests and Community

---

Welfare Councils will increasingly come to realize the similarity of their aims and objectives. It is also felt that the laymen associated with Chests and Councils will aid in the establishment of new Community Trusts, and thus place their communities in a more favorable position to meet social welfare needs. If this study will, in any way, serve this desirable end, its purpose will have been accomplished.
APPENDICES
APPENDIX I

Questionnaire Used for Collecting Information From
Community Trusts for this Thesis
COMMUNITY TRUST QUESTIONNAIRE

I. The Community Trust or Foundation

1. Name of Community Trust or Foundation

__________________________________________________________

2. Date of Organization

__________________________________________________________

3. Total of Active Capital as of July 1, 1952

$ ______________________________________________________

4. Disbursements last fiscal year

$ ______________________________________________________

5. Were disbursements made on order of: (Check one below)
   Board of Trustees? ______   Distribution Committee? ______

II. The Community Trust Executive

1. Indicate the employment status of the executive of your Community Trust:
   1. Single executive Yes No (Check one)
   2. Full time ______ Part time ______
   3. Paid ______ Unpaid ______
   4. Other (Please explain) ______________________________________

2. Does the Director or Secretary of your Community Trust hold any salaried position with:
   1. Community Chest ___________________ Title ____________________
   2. Community Welfare Council ____________ Title __________________
   3. Other agency ______________________ Title __________________

III.

1. Is there any other relationship between the Community Trust and the local Community Chest and/or Community Welfare Council, either personal or organizational? If so, please explain.

________________________________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________
III. (Cont'd)

2. What evidence is there that the Community Trust was an outgrowth of the interests of persons actively associated with the local Community Chest and/or Community Welfare Council?

______________________________________________________________

______________________________________________________________

IV.

1. (a) Indicate briefly below, any surveys or research projects that your Community Trust has co-sponsored or cooperated in, with the local Community Welfare Council.

______________________________________________________________

______________________________________________________________

(b) Did this cooperation take the form of a money grant from the Community Trust for the project?

If so, please indicate the number and total dollar value of grants made for each project and the percentage of the total cost borne by the Community Trust.

______________________________________________________________

______________________________________________________________

2. Has your Community Trust supplied funds for any pilot or experimental agencies that were initiated or co-sponsored by the local Community Welfare Council?

If so, please indicate the total dollar value of each grant and the number and percentage of the total cost borne by the Community Trust.

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________

______________________________________________________________
3. To what extent does your Community Trust participate in joint planning with the local Community Welfare Council?

V.

1. Please indicate the number of Community Chest agencies to whom your Community Trust has made grants for capital improvements and the dollar value of these.

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2. Indicate the number of Community Chest agencies to whom your Community Trust has made grants for operating expenses, and the dollar value of each grant.

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3. Indicate any newly-established social work agencies to which your Community Trust made an initial grant, and which subsequently became a Community Chest Agency.

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4. Describe briefly any other grants that were made by your Community Trust to the local Community Chest, and if such grants were made for a designated purpose, please state the purpose.

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VI.

1. Indicate the extent to which your Community Trust has made grants for educational purposes or scholarships to individual persons.

__________________________________________________________________________

2. To what extent has your Community Trust provided grants for:

   Schools ___________________ College ____________________________

   Libraries __________________ Religious Organizations __________________

   Private non-Community Chest agencies ____________________

   Organizations of a service nature, not primarily social agencies, i.e. Lions, Rotary, etc., for social service purpose __________________

VII.

1. What is the policy of your Community Trust toward new or experimental social work projects or studies?

__________________________________________________________________________

2. Has your Community Trust taken the initiative in setting up any studies or experimental projects?

__________________________________________________________________________

3. Does your Community Trust take any direct responsibility for the supervision of any of its supported projects or studies? If so, please explain __________________

__________________________________________________________________________

4. In what areas do you feel that the relationship between your Community Trust and the local Community Chest and/or Community Welfare Council might be strengthened?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
APPENDIX II

Questionnaire Used for Collecting Information From Community Chests and Community Welfare Councils for this Thesis
COMMUNITY TRUST QUESTIONNAIRE
FOR COMMUNITY CHESTS AND COMMUNITY WELFARE COUNCILS

1. Name of Community Chest or Community Welfare Council.

2. Describe briefly the relationship existing between the Community Chest or Council and the local community trust.

3. In what areas do you feel that this relationship might be strengthened?

4. In what areas do you feel that the organizational structure of the local community trust might be changed in order to make it more effective?

5. Assuming that your city had no community trust or foundation, do you feel that either the Community Chest or the Community Welfare Council should take the initiative in helping to establish such a trust? Why?

6. Do you consider the Community Trust or foundation in your city to be a valuable and effective asset in the development of community services and/or community organization?
### APPENDIX III

**Financial Data Concerning the Community Trusts Cooperating in this Study**

<table>
<thead>
<tr>
<th>Name of Trust</th>
<th>Date of Organization</th>
<th>Total Active Capital Resources</th>
<th>Disbursements Last Fiscal Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boston Permanent Charity Fund</td>
<td>1915</td>
<td>$10,228,104</td>
<td>$500,000</td>
</tr>
<tr>
<td>Buffalo Foundation</td>
<td>1919</td>
<td>1,680,244¹</td>
<td>133,857</td>
</tr>
<tr>
<td>California Community Foundation</td>
<td>1915</td>
<td>4,941,645</td>
<td>182,836</td>
</tr>
<tr>
<td>Cambridge Foundation</td>
<td>1916</td>
<td>378,793</td>
<td>29,374</td>
</tr>
<tr>
<td>Chicago Community Trust</td>
<td>1915</td>
<td>11,569,309²</td>
<td>517,785</td>
</tr>
<tr>
<td>Cleveland Foundation</td>
<td>1914</td>
<td>17,117,507²</td>
<td>481,418</td>
</tr>
<tr>
<td>Colorado Springs Community Trust Fund</td>
<td>1928</td>
<td>477,067</td>
<td>39,642</td>
</tr>
<tr>
<td>The Columbus Foundation</td>
<td>1943</td>
<td>235,268³</td>
<td>44,661</td>
</tr>
<tr>
<td>Hartford Foundation for Public Giving</td>
<td>1925</td>
<td>1,872,350</td>
<td>86,190</td>
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<tr>
<td>Indianapolis Foundation</td>
<td>1916</td>
<td>3,299,702</td>
<td>112,365</td>
</tr>
<tr>
<td>LaCrosse Community Trust</td>
<td>1930</td>
<td>105,674</td>
<td>4,750</td>
</tr>
<tr>
<td>Minneapolis Foundation</td>
<td>1915</td>
<td>1,600,000</td>
<td>124,930</td>
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</tbody>
</table>

¹ Other than in 1916.
² Other than in 1915.
³ Other than in 1914.
APPENDIX III. Financial Data. (continued):

<table>
<thead>
<tr>
<th>Name of Trust</th>
<th>Date of Organization</th>
<th>Total Active Capital Resources</th>
<th>Disbursement Last Fiscal Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Britain Foundation</td>
<td>1940</td>
<td>$280,000</td>
<td>$5,000</td>
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<tr>
<td>New Haven Foundation</td>
<td>1928</td>
<td>1,900,000</td>
<td>85,000</td>
</tr>
<tr>
<td>Norfolk Foundation</td>
<td>1950</td>
<td>500,000</td>
<td>None</td>
</tr>
<tr>
<td>Philadelphia Foundation</td>
<td>1918</td>
<td>2,273,342</td>
<td>No data given</td>
</tr>
<tr>
<td>Pittsburgh Foundation</td>
<td>1945</td>
<td>2,664,935</td>
<td>125,751</td>
</tr>
<tr>
<td>Rhode Island Foundation</td>
<td>1916</td>
<td>1,428,919</td>
<td>103,938</td>
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<tr>
<td>San Francisco Foundation</td>
<td>1948</td>
<td>268,682</td>
<td>110,854</td>
</tr>
<tr>
<td>Spartanburg County (S.C.)</td>
<td>1943</td>
<td>1,129,395</td>
<td>46,795</td>
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<tr>
<td>Foundation</td>
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<td>Winnipeg Foundation</td>
<td>1921</td>
<td>3,381,418</td>
<td>136,488</td>
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<tr>
<td>Winston-Salem Foundation</td>
<td>1919</td>
<td>4,217,108</td>
<td>479,063</td>
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<tr>
<td>Vancouver Foundation</td>
<td>1943</td>
<td>372,166</td>
<td>No data given</td>
</tr>
</tbody>
</table>

NOTE: Financial data is given as of July 1, 1952, except where noted.

1 Capital resources and disbursements for year ending October 1, 1952
2 Capital resources and disbursements for year ending December 31, 1951
3 Capital resources and disbursements for year ending October 15, 1951
4 Capital resources and disbursements for year ending December 31, 1952
5
BIBLIOGRAPHY

BOOKS


NEWSPAPERS AND PERIODICALS


UNPUBLISHED MATERIALS


SPEECHES


REPORTS AND PAMPHLETS

Miscellaneous reports and pamphlets were received from the twenty-three cooperating Community Trusts. In addition, the writer received valuable materials from the New York Community Trust, the Trust Department of the Rochester, New York, Community Chest and the office of the National Committee on Foundations and Trusts for Community Welfare.