# THE CARNEGIE FOUNDATION FOR THE ADVANCEMENT OF TEACHING. FOUNDED 1905

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1919

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The six institutions described in the first section of this Manual were founded in years so recent that their beginnings are today fresh in the memory of those fortunate enough to have been associated in their inception and development. To them the personality of the founder, his belief in human progress, his optimism for the future, his sincere desire to do the best with the great fortune genius had brought together, were part and parcel of these early associations.

Before the memories of these days grow dim, while the founder is with us, still full of faith for the future, notwithstanding the confusion and the pain that have fallen upon the world, it seems fitting to set down in the pages of this handbook an account of these beginnings, to tell briefly the story of how these enterprises were launched, what were the visions that set them afloat on the stream of time, and to render some account of the short voyage they have made in common. The statement which follows is the story of the first twelve years of the Carnegie Foundation for the Advancement of Teaching, the fourth in time of Mr. Carnegie's spiritual children, born in 1905, and christened by an Act of Congress in the spring of 1906.

For a special reason the present moment is fitting for an account of the Carnegie Foundation, told not entirely in statistics but in terms of human experience.

When the Carnegie Foundation was begun neither the founder nor the Trustees conceived of the teacher's pension except in terms of a free gift to a man grown old in a life of unselfish service. While the Act of Incorporation and the Rules adopted by the Trustees reserved to them full power to change their policy and plans, this conception of the teacher's pension seemed at that time the basis of a permanent policy.

*Quid non longa valebit permutare dies?* or as Mr. Carnegie preferred to quote from one of his own poets— "Nae man can tether time or tide." Time has moved swiftly with the Carnegie Foundation, and the lapse of twelve years finds it working for the same objects for which it was founded but through plans greatly modified by experience and study.

In no respect did Mr. Carnegie show greater foresight than in emphasizing, as usual, in his letter of gift the freedom left to his Trustees to modify, or, under certain circumstances, to change completely the methods of applying the great endowments entrusted to them. To the Trustees of the Carnegie Foundation was committed the problem of teachers' pensions. The pension problem, not alone for teachers but for all groups in the body politic, became within a few years thereafter a social and economic question of the highest importance. The Trustees of the Foundation were led after years of study to a conception of a pension system widely different from that with which they started. As honest and conscientious Trustees, they have sought to face resolutely the difficulties of the transformation they conceived to be necessary.

In this process the founder has himself taken the keenest interest. It is a source of the deepest satisfaction that he has lived to approve step by step the process under which the original plan of administration of the Carnegie Foundation has been modified, in the light of experience and study. In his judgment these changes are changes in method only, whose only object is to serve in a deeper and larger way the great purpose for which the Foundation came into being.

## I

## ORGANIZATION AND ADMINISTRATION

The Carnegie Foundation was the outcome of Mr. Carnegie's sympathy with the cause of education, and of his desire to be of service to the teachers of America. In a letter of April 16, 1905, announcing a gift for this cause, he wrote "I have reached the conclusion that the least rewarded of all the professions is that of the teacher in our higher educational institutions. . . . Able men hesitate to accept teaching as a career, and many old professors whose places should be occupied by younger men can not be retired. . . . I have, therefore, transferred to you and your successors, as Trustees, $10,000,000 five per cent first mortgage bonds of the United States Steel Corporation, the revenue from which is to provide retiring pensions for the teachers of universities, colleges and technical schools in our country, Canada and Newfoundland, under such conditions as you may adopt from time to time." This letter was addressed to twenty-five men including in their number many of the best known presidents of colleges and universities in the United States, such as President Eliot of Harvard, President Harper of Chicago, and President Wilson of Princeton. A list of this first group of Trustees is given in the appendix of this paper.

The first Executive Committee was composed of the following Trustees: Henry S. Pritchett, ex officio, Nicholas Murray Butler, Robert A. Franks, Charles C. Harrison, Alexander C. Humphreys, Frank A. Vanderlip, Woodrow Wilson.

The Executive Committee, by the direction of the Board, obtained from the Congress of the United States an act of incorporation.

This act enabled the corporation to receive and maintain funds for paying pensions to college teachers in the United States, Canada and Newfoundland, and "in general to do and perform all things necessary to encourage, uphold and dignify the profession of the teacher and the cause of higher education" in these three countries. The act is printed in full in the appendix.

Of the original members of the Board fifteen still remain in service. President William R. Harper died before taking his seat. Other members have resigned as they have given up their university places.

The by-laws of the Board of Trustees provide for the election each year of a chairman of the Board, who has duties independent of the President, including the presiding over meetings, the appointment of committees, and the designation each year of an independent auditor to examine the books and accounts of the Foundation. The following Trustees have served as chairman of the Board: President Charles W. Eliot, from 1905 to 1909; Provost Charles C. Harrison, from 1909 to 1910; Principal William Peterson, from 1910 to 1914; President William Frederick Slocum, from 1914 to 1917; President Arthur Twining Hadley, since 1917.

The administrative officers of the Board are: Henry S. Pritchett, President; Robert A. Franks, Treasurer; Clyde Furst, Secretary.

These officers are appointed by and hold office at the pleasure of the Board.

The annual meeting of the Board of Trustees is held on the third Wednesday in November, a date which falls near the birthday anniversary of Mr. Carnegie. It has been the custom at the annual gatherings for Mr. Carnegie to meet the Board at a luncheon held between the morning and afternoon sessions at which, without taking part in the business meeting, he has been able to express his conception of the scope and development of the work of the Foundation. These conferences, particularly those of the earlier years, will long be remembered by the Trustees as gatherings from which they came away full of the hope and the faith of which the founder was so triumphant a representative.

When the Board had obtained a charter and was duly organized for its work, the first task to be met was the formulation of definite rules for the granting of retiring allowances.

It was clear that the granting of such allowances upon petition and fortuitously could serve no permanent purpose. Retiring allowances to be of value must come in accordance with rules under which a teacher would be entitled to anticipate such an allowance under stated conditions. Furthermore, it was clear that the funds at the disposition of the Trustees could provide retiring allowances for a limited number of teachers only. The Trustees therefore admitted to the privileges of the retiring allowances certain institutions, whose work was clearly of true college or university quality, and fixed rules for retirement under which the teachers in these institutions might expect retiring allowances. These are known as associated institutions.

The rules adopted for conferring retiring allowances were based upon length of service and upon age. Twenty-five years of service as a professor was the minimum basis of the service pension and sixty-five years the minimum limit of age at which retirement could be asked.

In making and announcing these rules, the Trustees of the Foundation took pains not to bind themselves to any contractual arrangement or to promises they might be unable to fulfil. In connection with the announcement of the rules, and as part of the same memorandum, they reserved the right to make such changes as experience might indicate as desirable for the benefit of the whole body of teachers. This right was soon exercised, in 1908, by the extension of the privileges of the Foundation to widows of teachers and to instructors as well as to professors, and in 1909 by the elimination of the pension granted on the basis of service alone.

Notwithstanding the need to grant retiring allowances according to rule, rather than in response to requests and recommendations, the Trustees realized that it was Mr. Carnegie's wish to serve the old and faithful teachers of this generation, to as great an extent as possible. The Trustees have therefore always devoted a considerable proportion of the income of the Endowment to the payment of retiring allowances to individual teachers, in institutions not associated with the Foundation, but who had grown old in teaching, and who had rendered long and distinguished service in their respective States. The income of the Foundation has never been pledged for the indefinite future to a group of teachers.

Immediately upon the announcement of the rules of retirement, the Trustees were called upon to decide a difficult question of general policy. Mr. Carnegie, in the language of his letter of gift, did not "presume to include" institutions controlled and supported by the States. The representatives of the tax-supported institutions made vigorous application to be included in the list of institutions sharing in the pension privileges. The inclusion of State institutions was urged mainly upon three grounds—that these institutions were nonsectarian and therefore belonged to the class of colleges in which Mr. Carnegie was most interested; that to omit them from the pension privileges of the Foundation would divide American institutions of learning into two contrasted groups, and in the third place it was argued that the States of the Union and the provinces of Canada would never pay pensions to teachers, and therefore aid from private sources was essential if pensions were ever to be obtained by the teachers in tax-supported institutions.

By direction of the Trustees the matter was made the subject of a special report by the President. This report presented the arguments for and against the establishment of a pension system in State institutions by private endowment, and urged in conclusion that the best interests of the teachers in State institutions would be conserved by obtaining pension privileges through the State governments, even though it might require time to educate the public to this notion.

Mr. Carnegie in March 1908, offered five millions of dollars additional endowment to enable the Trustees to enlarge the number of institutions "should the governing boards of any State universities apply for participation in the fund and the legislature and governor of the State approve such application." He directed that the two funds thus provided be considered a single endowment. In accordance with these conditions, application has been made on behalf of all of our State universities for a share in the pensions provided by this endowment, and these applications have been approved by the legislatures and governors of the respective States. Similar action has been taken in the provinces of Canada.

It is interesting to note that although little more than ten years have elapsed since this discussion, pensions for teachers are already being paid in whole or in part by the following State or Provincial Governments: Arizona, California, Colorado, Connecticut, Illinois, Indiana, Maine, Maryland, Massachusetts, Minne-