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Guide to

George A. Brakeley, Jr.

Papers, 1928-1995

Mss 013

George A. Brakeley, Jr., Papers, 1928-1995
Mss 013
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ABSTRACT

George A. Brakeley, Jr., has been involved in the business of providing counsel to fund raising entities since 1934. In that year, he joined the firm for which his father was Senior Vice-President, the John Price Jones Company, Inc. (JPJ). Brakeley and JPJ developed "Survey, Analysis and Plan" reports for groups seeking to begin a fund raising campaign. In the 1940's, Brakeley began developing a campaign for a Canadian client, McGill University, which led to the creation of John Price Jones Company (Canada), Ltd., headed by Brakeley. A few years later, in the mid-1950's, he started a firm, G. A. Brakeley Company (GABCO). This company was extremely successful, and by the late 1960's had offices on both U.S. coasts and in Canada. Brakeley continued his association with JPJ during this period, however, as well as developing smaller ventures such as Brakeley and Roberts Ltd. (a public relations firm in Canada), and the Robert Johnston Company (headed by an associate of Brakeley).

In 1972, GABCO and JPJ officially merged to become Brakeley, John Price Jones, Inc. (BJPJ), with Brakeley as Chairman of the Board. In 1983, George A. Brakeley III and other senior officers of BJPJ bought the controlling interest of the company, although Brakeley Jr. stayed on as Chairman until 1986. A year later he was named Senior Consultant, a title he still holds.

The Brakeley papers consist of client files of seven companies associated with Brakeley, staff training materials, publications and marketing materials, manuscripts, study reports, magazine and journal articles, speech transcriptions, and staff memoranda.

ACCESS

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ACQUISITION

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HISTORICAL NOTE

The history of George A. Brakeley Jr.'s involvement in fund raising actually starts with his father, George A. Brakeley Sr., a newspaperman who worked with a reporter named John Price Jones at the *New York Sun* in the early years of the twentieth century. Jones also did fund raising work during World War I through the Liberty Loans program. Thomas Lamont, senior officer of J.P. Morgan, took notice of him and suggested he run a fund raising campaign for Harvard University. His success with that effort gave him the impetus to form his own company, John Price Jones Company, Inc. (JPJ), for which he recruited Brakeley Sr. as an executive vice-president in 1919.

Brakeley Jr. was born on April 18, 1916 in Washington, D.C., and was raised primarily in Princeton, New Jersey and Chestnut Hill, Pennsylvania, outside of Philadelphia. Because his father had left JPJ to become administrative vice-president at the University of Pennsylvania, Brakeley elected to attend school there to study English and journalism. In 1937, the summer before his graduation from the University of Pennsylvania, he was offered an internship by John Price Jones, which he accepted. In 1938, after graduation, having decided against newspaper work and enjoying the variety of tasks involved in the fund raising business, he went back to work at JPJ and began taking on more responsibility, working on four or five accounts, such as the William Alan White Committee to Defend America by Aiding the Allies, of which he was the New York director during 1940-1941.

Brakeley left in 1941 to fight in World War II, serving with his National Guard unit in the 107th Infantry, but he had to leave the military for a year because his wife developed tuberculosis. Having not seen any fighting previously, but wanting to, he later re-enlisted with the Corps of Engineers as a private. He quickly received a commission as a Captain and made his way overseas to China and Vietnam, where he commanded several troops of engineers. In an oral history done by Jeanne Harrah-Conforth, he cites his army experience as proving to him that he had leadership skills, which in turn helped to create a personal drive for success.

Upon his return to the United States, Brakeley rejoined JPJ, where he was asked to run some larger campaigns. He was responsible for creating the New York City Committee of the American Cancer Society in 1946-1947, for which he developed a new and unusually aggressive campaign that brought in over \$1 million. He continued to run that campaign for two more years. He also was put in charge of the New York Salvation Army Annual Appeal, and then sent to McGill University in Montreal to run the first ever capital campaign in Canada. Returning to the U.S. in late 1949, he served for a year as an assistant dean of the Harvard School of Public Health and helped to start their campaign.

JPJ's success in Canada with McGill University prompted the firm to create a Canadian subsidiary, John Paul Jones Company (Canada), Ltd., in 1950, which Brakeley started for them and then bought three years later. He changed the name to G.A. Brakeley & Company, Ltd., and then sold his interest in it in 1961.

In 1955, Brakeley had an opportunity to gain Stanford University as a client, but needed an office near them in order to secure the deal. He started a U.S. branch of his company in San Francisco, G.A. Brakeley & Company, Inc., which according to Brakeley was the first significant fund raising company west of the Mississippi.

Three years later, in 1958, Brakeley expanded the operation by opening an office in New York City. The west coast portion of the business was sold in 1961, although it was re-acquired in 1978 and eventually dissolved. In 1972, G.A. Brakeley and Company bought controlling interest in John Price Jones Company, Inc., and merged it to form Brakeley, John Price Jones, Inc., with Brakeley installed as chairman. Brakeley's son, George A. Brakeley III, along with two other senior officers of the company, purchased controlling interests of the firm in 1983. Brakeley Jr. served as chairman for three more years, and in 1987 became Senior Consultant, a position he has held ever since.

Brakeley has also been involved with three other companies: Brakeley and Roberts (a public relations firm), the Robert Johnston Company (a fund raising counsel firm headed by a colleague of Brakeley's), and Brakeley/Geever Venture (which concentrated on smaller community fund raising groups).

He also has served as chairman of the American Association of Fund Raising Counsel (AAFRC) but has given responsibility for the firm's representation in the AAFRC to other company officers. Instead he concentrated on working with the National Society of Fund Raising Executives (NSFRE). For many years Brakeley has served as a director of the NSFRE, which he feels is very important to the fund raising business because it is an opportunity for a very broad base of people to gather and work together. He has declined the opportunity to serve as chairman because he believes the head of a firm should not be in that position since the NSFRE represents the interests of individual fund raisers, not firms.

Brakeley also has been vice-chairman of the Center for the Study of the Presidency, and has been involved with the International Council for Coordinating Cancer Research and the Forum for World Affairs. He has authored a book, Tested Ways to Successful Fund Raising.

REFERENCES

Brakeley, John Price Jones, Inc., "The Story of the Firm", (<http://www.brakeley.com/1a.htm> : Brakeley, John Price Jones, Inc. website, 1997).

Jeanne Harrah-Conforth, "Philanthropy: a History of Fund Raising — Interview with George A. Brakeley, Jr., 23 November 1987", (Indianapolis, IN: Indiana University Oral History Research Center, 1987).

Jeanne Harrah-Conforth, "Philanthropy: a History of Fund Raising — Interview with George A. Brakeley, Jr., 7 December 1987", (Indianapolis, IN: Indiana University Oral History Research Center, 1987).

SCOPE AND CONTENT NOTE

The George A. Brakeley, Jr., Papers document the development of fund raising through his personal involvement in the field and the records of his various firms. The papers are divided into two major series: Administrative Files and Client Files.

Administrative Files

The Administrative Files cover the internal records of the various companies and contains records detailing how Brakeley and his associated firms approached the business of providing fund raising counsel. The records illustrate how Brakeley promoted both his companies and the business of fund raising, how marketing and advertising were handled, how staff was trained, and what research was performed and why. A retrospective look at some of the early fund raising materials produced by the John Price Jones Company was printed in book form for the twenty-fifth anniversary of that firm.

George A. Brakeley Articles

Brakeley has published articles in various periodicals over the past twenty-five years. He uses these to accomplish two basic goals: to make the public more aware of the role of philanthropy in society and to share information with other fund raising counsel about various issues, such as strategies that have worked well for his companies. Articles were published in both philanthropy-focused journals such as Philanthropy Monthly and National Society of Fund Raising Executives Journal, as well as in general periodicals such as New York Times.

Manuscript, Unpublished

This is a typewritten manuscript for Democracy's Gift Dollars, an unpublished monograph written by Brakeley.

George A. Brakeley Memoranda

The bulk of these memoranda, which date from 1973-1975, concern Brakeley's involvement with the Commission on Private Philanthropy and Public Needs. This Commission, initiated by John D. Rockefeller III and commonly referred to as the "Filer Commission" in reference to Chairman John H. Filer, studied the role of private philanthropy in the United States and how it might be strengthened. Brakeley, while not directly involved in the Commission, served as counsel.

George A. Brakeley Speeches

Brakeley has gathered, over the last forty years, a set of transcripts from speeches he has given to various groups. The speeches include presentations to clients which discuss the findings or status of their case study, talks given to professional organizations such as the National Society of Fund Raising Executives, educational presentations given as part of a workshop or other forum, such as the Computer in Hospital Development Workshop. As noted in the box listing below, a few of the transcripts have audio cassette recordings with them.

Marketing Records

These materials are advertising and promotional materials used by Brakeley's companies. There are print ads, direct mailings, client lists, and pamphlets which explain the Brakeley approach to philanthropy and fund raising.

Publications

Brakeley produced a newsletter, News from New York, on an irregular basis, which dealt with general fund raising issues and events, and was distributed to industry professionals.

Staff Articles

Just as Brakeley felt it was important to publish articles about his field in order to educate and communicate, he also encouraged his staff to do the same. The articles in this subseries are arranged according to the publication in which they appeared.

Study Reports

Brakeley's overriding philosophy in the operations of his companies has been a spirit of voluntarism and public service. Throughout his career, he has stressed the importance of the "philanthropic impulse," of companies giving of themselves when they can't always give money. One way in which a company can contribute is by doing research. Brakeley has therefore always emphasized research as part of his companies' operations. The firms have released many unique study reports over the years which look at different aspects of philanthropy and its impact on society. Topics include higher education, the arts, and general fund raising education.

Training Materials

Brakeley endorsed a *pro forma* approach to staff training, and these manuals, newsletters and other materials used by his firms illustrate that attempt to develop a standardized format and process for dealing with clients. Each company in which he was involved generally provided a thorough training manual or guide, and then continued staff education through periodic communications, such as his Chairman's Letter and the Philanthropic Papers, as well as non-periodic reports such as The Survey, Analysis and Plan: Basic Questions to be Answered.

Client Files

Brakeley's approach to fund raising is that financial support for any philanthropic venture depends upon the character of the institution itself and the strength of the program it is pursuing. Therefore, he believed that a fundamental part of any plan for large-scale fund raising is a careful study of the institution, the work it is doing, operational methods, financial status, the institution's needs, its relationships with the people it serves, and the people from whom support may be expected. The "Survey, Analysis and Plan" was

designed to examine these issues and to put forth the results of “careful fact-finding, analysis of the facts and a plan of action.” A typical Survey, Analysis and Plan consists of six parts:

1. Background. This section presents an overview of the client’s field, current trends within that field, public relations considerations, and any standards or principles of fund raising to be kept in mind in the course of the fund raising.

2. Survey. The survey is a study of the “assets and liabilities” of the client institution itself and usually will consider both the institution as it is today and the opportunities, plans and needs of the institution in the future.

3. Analysis. In this section, the facts presented in the Survey are weighed according to the situational factors presented in the Background section. The analysis is broken into seven key parts:

A. The Case is the specific justification or cause for which the institution exists, and is the basic premise on which any appeal for support is made. The analysis should test the strength of the case, identifying weak areas as well as those which should have popular appeal, and also should identify a central theme for the appeal.

B. Leadership. The effectiveness of current leadership and potential needs for new leadership are illustrated in this section.

C. Prospects. Qualitative and quantitative analysis is provided concerning both the existing field of prospects and a potential one.

D. Workers. This section examines the pool of workers which would be needed for a fund raising plan, and provides leads as to where new workers may be obtained if necessary.

E. Expenses. A determination is made as to whether the client can afford the expenses expected to be incurred in the fund raising, and “helpful” suggestions are made.

F. Favorable and Unfavorable Factors. This section balances the above factors and then looks at them in the light of current economic and business trends in an effort to determine how much money might be raised in a campaign.

G. Conclusion. The analytical findings are summarized, recommendations are given concerning what weaknesses must be strengthened, the degree of success is gauged and suggested methods for that success are given.

4. Campaign Specifications. General specifications for a campaign are given, taking into consideration the conclusions drawn in the analysis. Topics such as the goals, general character of the campaign, timing, publicity, and the name of the campaign are covered in this section.

5. The Plan. This element determines how the specifications should be met. Typically, it is divided into three parts:

A. Plan of Organization. This section usually offers a chart along with textual descriptions of each leader and committee. Items included here are the number of workers to be used, methods of recruitment, and recommendations on leadership style.

B. Plan of Publicity. This section will discuss the aims and theme of a publicity campaign, the media to be used, and whom is to be responsible for the preparation, approval, and issuance of publicity materials.

C. Operating Schedule. This part of the plan gives the specific timing of the campaign, including schedules for preparation, cultivation, and direct effort.

6. The Budget. This final section is a detailed statement of the estimated costs of the campaign, based on previous experiences.

These segments were most often collected and issued together in a final report called "Survey, Analysis and Plan", but occasionally an individual segment, typically a survey or case statement, would be issued separately, usually because that was the only service for which the client contracted. In a few instances, more expansive coverage was given to certain large campaigns; for these clients, longer and more intensive "case histories" were developed. Case histories document the Brakeley companies' involvement beyond the planning stages and into the actual implementation of the campaign. This involvement generally consisted of an oversight of the clients' fund raising staff and operations, not active participation in the fund raising itself. The collection contains case histories for fifteen institutions:

Colby College
Colgate University
College of Mount Saint Vincent
Columbia - Presbyterian Medical Center
Emory University
Foundation Center
Frontier Army Museum Association
Hospital of St. Raphael
King's College

LDS Hospital
 McGill University
 Smithsonian Institution Quadrangle Campaign
 Stanford University
 University of Southern California
 Young Women's Christian Association

The Client Files are broken into seven subseries, one for each Brakeley entity. Within each subseries will be found the "Survey, Analysis and Plan" reports, case histories, and various segment reports created for clients of that firm, organized alphabetically by the client name. The subseries are:

Brakeley / Geever Venture
Brakeley, John Price Jones, Inc.
Brakeley & Roberts, Ltd.
G. A. Brakeley and Company
John Price Jones Company, Inc.
John Price Jones Company (Canada), Ltd.
Robert Johnston Company

SERIES LIST

CONTENTS	BOX	FOLDER
Administrative Files		
George A. Brakeley Articles, 1972-1987		
<u>American Arts</u> , 1972	1	1
<u>Business Week</u> , 1979	1	2
<u>Grantsmanship Center News</u> , 1980	1	3
<u>National Society of Fund Raising Executives Journal</u> , 1981	1	4
<u>New York Times</u> , 1973-1981	1	5
<u>Philanthropy Monthly</u> , 1982	1	6
<u>Wall Street Journal</u> , 1987	1	7
Manuscript, Unpublished, 1973		
<u>Democracy's Gift Dollars</u> , 1973	2	1-2
George A. Brakeley Memoranda, 1973-1975		
Brakeley, John Price Jones Inc., 1974	1	8
Filer Commission, 1973-1975	1	9-13
George A. Brakeley Speeches, 1958-1986		
American Alumni Council, 1961-1968	1	14
American Association of Botanical Gardens and Arboreta, 1974	1	15
American Association of Colleges, 1967-1974	1	16

CONTENTS	BOX	FOLDER
Administrative Files, George A. Brakeley Speeches (cont.)		
American Association of Fund Raising Counsel, 1962-1975	1	17
American Association of Junior Colleges, 1965	1	18
American Cancer Society, 1965-1972	1	19
American College of Hospital Administrators, 1968	1	20
American Hospital Association Institute on Capital Financing, 1970	1	21
American University in Cairo, 1983	1	22
Association of Urban Universities, 1963	1	23
Big Ten Associate Development Directors, 1977	1	24
Council for Advancement and Support of Education, 1980-1984	1	25
Chamber of Commerce of the United States Ad Hoc Committee on the Economic Impact of Peace After Vietnam, 1968	1	26
Chicago Society of Fund Raising Executives, 1966-1971	1	27
Computer in Hospital Development Workshop, 1971	1	28
Computer in Philanthropy Conference, 1971	1	29
Conference for the Advancement of Understanding and Support of Higher Education, 1958	1	30
General Conference of Seventh-Day Adventists, 1985	1	31
Girls Clubs of America, 1972	1	32
Good Samaritan Hospital, 1980	1	33
Independent College Funds of America, 1967-1972	1	34
Loyola Academy, 1974	1	35
Marion General Hospital, 1971	1	36
Miami, University of, 1983	1	37
Michigan Alumni Council, 1975	1	38
Michigan Fund Raising Institute, 1981	1	39
Middle Atlantic Health Congress, 1983	1	40
Miscellaneous Speech Notes, n.d.	1	41
Miscellaneous Speech Notes, 1974-1986	1	42
National Association of Hospital Development, 1980	1	43
National Association of Independent Schools, 1975	1	44
National Association of State Universities and Grant Colleges, 1983	1	45
National Catholic Development Conference, 1972 (w/ audiotape)	1	46
National Center on Philanthropy, 1974	1	47
National Easter Seal Society, 1972-1977	1	48
National Interfraternity Conference, 1982	1	49
National Multiple Sclerosis Society, 1974	1	50

CONTENTS	BOX	FOLDER
Administrative Files, George A. Brakeley Speeches (cont.)		
National Society of Fund Raisers, 1968-1975	1	51
National Society of Fund Raising Executives, 1980-1985 (w/ audiotapes)	1	52
New York University School of Education, 1968	1	53
Performing Arts Management Institute, 1977	1	54
Saint Francis Hospital Committee of One Thousand, 1968	1	55
Samaritan Health Service Joint Conference, 1980	1	56
Sisters of Providence Corporation, 1978	1	57
Union of Independent Colleges of Art, 1972	1	58
United States Jaycees, 1968	1	59
Zeta Psi Fraternity, 1984	1	60
Marketing Records, 1934-1983		
Advertising Materials, 1973-1983	2	3
Brakeley, John Price Jones Inc. Client Lists, 1972-1983	2	4
G.A. Brakeley Company Promotional Materials, n.d.	2	5-6
John Price Jones Company Client Lists, 1950-1971	2	7-8
John Price Jones Company Promotional Materials, 1934- 1969	2	9-17
<u>Memo From Brakeley</u> , 1958	2	18
<u>Records Management Service</u> , n.d.	2	19
<u>Survey, Analysis and Plan: Its Purpose and Achievement</u> , n.d.	2	20
Publications, 1962-1983		
<u>News From New York</u> , 1962-1983	2	22
Staff Articles, 1959-1994		
<u>Association for Healthcare Philanthropy Journal</u> , 1993	2	23
<u>American Alumni Council News</u> , 1959	2	24
<u>Charities Management</u> , 1993	2	25
<u>Education Marketing</u> , 1994	2	26
<u>Fund Raising Management Magazine</u> , 1985-1993	2	27
<u>Fund Raising Review</u> , 1986	2	28
<u>General Conference of Seventh-Day Adventists</u> <u>Newsletter</u> , 1985	2	29
<u>Management Issues</u> , 1991-1993	2	30
<u>National Society of Fund Raising Executives Journal</u> , 1990-1991	2	31
<u>Professional Fund Raising</u> , 1994	2	32
Study Reports, 1930-1980		
<u>American Philanthropy in Higher Education</u> , 1969-1974	3	1
<u>American Philanthropy in Higher Education</u> , 1978	2	21
<u>Attitudes Toward Giving</u> , 1958	3	2
Catholic Gift Prospects, n.d.	3	3

CONTENTS	BOX	FOLDER
Administrative Files, Study Reports (cont.)		
<u>Fundamental Factors in Fund raising, 1930</u>	3	4
<u>Glossary of Fund Raising Terms, 1976</u>	3	5
<u>Independent Secondary Schools, 1959</u>	3	6
<u>Some Thoughts on Soliciting Big Gifts, 1965</u>	3	7
<u>Standards for Agency Self-Evaluation, 1972</u>	3	8
<u>Voluntary Support for Public Higher Education, 1960-1980</u>	3	9
<u>Voluntary Support for Urban Higher Education, 1960-1961</u>	3	10
<u>What, How & Why of Government Aid to the Arts in Seven Free Countries of Europe, n.d.</u>	3	11
Training Materials, 1952-1992		
Brakeley, John Price Jones Inc. Orientation Guide, 1976	3	12-13
<u>Case History In Successful Philanthropy, 1959</u>	3	14
<u>Chairman's Letters, 1964-1992</u>	3	15-25
G.A. Brakeley Companies Training Memoranda, 1959-1960	3	26
G.A. Brakeley Companies <u>Brief on Company Policies, Practices and Objectives, 1958</u>	3	27
G.A. Brakeley Companies <u>Fund Raising Study: Ten Point Check List for Letter Report, 1958</u>	3	28
G.A. Brakeley Companies <u>Program Director's Manual, 1971</u>	3	29-31
G.A. Brakeley Companies Staff Training Conference, 1968	3	32
G.A. Brakeley Companies <u>The Survey, Analysis and Plan: Basic Questions to be Answered, n.d.</u>	3	33
John Price Jones Company Training Manual, 1971	3	34-35
John Price Jones (Canada), Ltd. Staff Letter, 1952	3	36
<u>Philanthropic Papers, 1963-1976</u>	3	37
John Price Jones Twenty-fifth Anniversary Commemorative Book, 1944	32	1
Client Files		
Brakeley / Geever Venture, 1986		
YWCA of Whiteplains and Central Westchester, 1986	4	1-10
Brakeley, John Price Jones Inc., 1970-1995		
Admiral Theater Foundation, 1991	4	11
Affiliated Hospitals Center, Inc., 1975	4	12
AFS International / Intercultural Programs, 1983	4	13
Aga Khan Foundation Programs Abroad, 1983	4	14
Aga Khan Hospital and Medical Center, 1983	4	15
Agnes Scott College, 1990	4	16

CONTENTS	BOX	FOLDER
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Alaska Fairbanks, University of, 1989	4	17
Albany Medical Center, 1984-1989	4	18
Albany Museum of Art, 1993	4	19
Albert Einstein Healthcare Foundation, 1991	4	20
Allegheny General Hospital, 1974	4	21
Alliance to Save Energy, 1977	4	22
American Association for the Advancement of the Humanities, 1981	4	23
American Cancer Society, 1989	4	24
American Cancer Society New Jersey Division, Inc., 1976	4	25
American Chemical Society, 1982-1986	4	26
American Council on Germany, 1987	4	27
American Farmlands Trust, 1991	4	28
American Fund for Dental Health, 1980	4	29
American Geographical Society, 1979	4	30
American Lung Association, 1988	5	1
American Occupational Medical Association, 1985	5	2
American Red Cross Mid-Atlantic Chapter, 1991	5	3
American Red Cross Northern Vermont Chapter, 1989	5	4
American Red Cross Sun Kingdom Chapter, 1990	5	5
American School in London, 1991	5	6
American University in Cairo, 1981	5	7
American Girl Scout Council, 1987	5	8
Ann Arbor Civic Theater, 1979	5	9
Arabian Horse Trust, 1993	5	10
Arena Stage, 1982	5	11
Arizona, University of, 1986	5	12
Artpark, 1991	5	13
Arts and Education Council of Greater St. Louis, 1980	5	14
Association for Retarded Citizens, Bergen-Passaic Counties, 1989	5	15
Atlantic Council of the United States, 1987	5	16
Baldwin-Wallace College, 1983	5	17
Bank Street College of Education, 1979	5	18
Barre Opera House Foundation, 1975	5	19
Bascom Palmer Eye Institute, 1982	5	20
Bayfront Medical Center, 1982-1983	5	21
Belleville Area College, 1977	5	22
Berklee College of Music, 1974	5	23
Berkshire School, 1980-1981	5	24-27
Beverly Hills Education Foundation, 1986	5	28

CONTENTS	BOX	FOLDER
Bienvenidos Children's Center, Inc., 1994	5	29
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Bigfork Center for the Performing Arts, 1986	5	30
Billings Center for the Performing Arts, 1983	5	31
Birmingham Civil Rights Institute, 1991	5	32
Bishop's School, 1989	5	33
Bon Secours - St. Joseph Hospital, 1994	5	34
Boston College, 1974	5	35
Boston University, 1989	5	36
Boy Scouts of America Greater New York Councils, 1977-1981	5	37
Boys' Clubs of Mount Kisco, 1982	5	38
Bradford College, 1977	5	39
Braille Institute of America, 1987	5	40
Bronx Lebanon Hospital Center, 1983	5	41
Brooklyn Museum, 1989	5	42
Bruno Kresky Forum for International Dialogue, 1993	5	43
Burbank Hospital, 1973	5	44
Calhoun School, 1972	6	1
California / Davis, University of, 1986	6	2
California Academy of Sciences, 1984	6	3
California Arboretum Foundation, 1987	6	4
California Building Industry Foundation, 1990	6	5
California Center for the Arts, 1994	6	6
California Institute of Technology, 1986	6	7
California State Parks Foundation, 1990	6	8
California State Polytechnic University / Pomona, College of Engineering, 1992	6	9
California State Polytechnic University / Pomona, College of Environmental Design, 1993	6	10
California State Polytechnic University / Pomona, School of Hotel & Restaurant Management, 1992	6	11
California State University / Dominguez Hills, 1984	6	12
California State University / Los Angeles, 1985	6	13
California State University / Sacramento, 1985	6	14
California Western School of Law, 1984	6	15
Cambridge University, 1989	6	16
Cardinal Newman College, 1977	6	17
Case Western Reserve University, 1973-1977	6	18
Cathedral of the Most Holy Trinity, 1988	6	19
Cedars - Sinai Medical Center, 1985	6	20
Cerritos Center for the Performing Arts, 1994	6	21

CONTENTS	BOX	FOLDER
Centre for Economic Policy Research, 1992	6	22
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Centro Agronomico Tropical de Investigacion y Enseñanza, 1987	6	23
Centro Svizzero di Calcolo Scientifico, 1993	6	24
Challenger Center for Space Science Education, 1989	6	25
Chalmers University of Technology, 1994	6	26
Chamber of Commerce of the United States, 1982	6	27
Champlain College, 1977	6	28
Charities Aid Foundation, 1993	6	29
Charter School, 1981	6	30
Chatham Township Volunteer Fire Department, 1992	6	31
Chautauqua Institution, 1978	6	32
Chicago, University of, 1981-1986	6	33
Children's Blood Foundation, 1990	6	34
Children's Hospital and Health Center, 1986	6	35
Children's Hospital Medical Center of Northern California, 1984	6	36
Children's Medical Charity, 1990	6	37
Children's Memorial Hospital, 1972	6	38
Choate Symmes Health Services, Inc., 1981	6	39
Christian Broadcasting Network, Inc., 1976	6	40
Church Charity Foundation of Long Island, 1984	6	41
Citadel, 1992	6	42
Claremont McKenna College, 1995	6	43
Cleveland Clinic Foundation, 1987	6	44
Cleveland Museum of Art, 1982	6	45
Cleveland State University, 1982	6	46
Coast Guard Academy Foundation, 1971	7	1
Coastal Educational Foundation, 1978	7	2
Colby College, 1980-1983	7	3-7
Colgate University, 1982	7	8
College of Insurance, 1987	7	9
Collegiate School, 1974	7	10
Colonial Williamsburg, 1990	7	11
Columbia - Presbyterian Medical Center Fund, Inc., 1973-1976	7	12-20
Columbus Project, 1987	7	21
Columbus School for Girls, 1978	7	22
Communications Bridge, 1983	7	23
Community Hospital of Brooklyn, 1979	7	24
Compton Verney Opera Project, 1990	7	25

CONTENTS	BOX	FOLDER
Connecticut, University of, 1972-1990	7	26-27
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Connecticut Counseling Centers, Inc., 1991	7	28
Connecticut Regional Medical Program, 1972	7	29
Conservancy, 1992	7	30
Conservation Foundation, 1991	7	31
Cooper - Hewitt Museum, 1984	7	32
Coronado Hospital Foundation, 1988	7	33
Cottage Grove Hospital, 1993	7	34
Council on Foreign Relations, 1982	7	35
Crozier - Chester Medical Center, 1976	7	36
Dartmouth College, 1976	8	1
Deafness Research Foundation, 1990	8	2
Delaware - Raritan Girl Scout Council, 1990	8	3
Depauw University, 1974	8	4
Deutscher Akademischer Austauschdienst, 1993	8	5
Diocese of Olympia, 1992	8	6
Direct Marketing Educational Foundation, 1986	8	7
Directions for Mental Health, Inc., 1995	8	8
Dorland Mountain Colony, 1988	8	9
Duquesne University, 1979	8	10
Earthwatch, 1985	8	11
East Los Angeles College, 1990	8	12
Eastside Performing Arts Center, 1989	8	13
Edgecliff College, 1974	8	14
Eisenhower Exchange Fellowships, 1977-1985	8	15
Eleanor Roosevelt Institute for Cancer Research, 1983	8	16
Emerson College, 1978	8	17
Emory University, 1982	8	18-27
English National Opera, 1988	8	28
Ephraim McDowell Cancer Center, 1979	8	29
Episcopal College Consortium, 1988	8	30
Episcopal Diocese of Arizona, 1982	8	31
Equal Opportunity Foundations, 1992	8	32
Erskine College, 1991	8	33
ETH, 1993	8	34
European Association for International Education, 1992	8	35
Evergreen State College, 1987	8	36
Experiment in International Living, 1976	8	37
Fairleigh Dickinson University, 1986	9	1
Family and Children's Services, Inc., 1990	9	2
Family Counseling and Guidance Centers, Inc., 1972	9	3

CONTENTS	BOX	FOLDER
Fine Arts Museums of San Francisco, 1982	9	4
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Floating Hospital, 1989	9	5
Foundation Center, 1986-1988	9	6-10
Foundation for the Junior Blind, 1991	9	11
Fraunces Tavern Museum, 1979	9	12
Fred Jordan Missions, 1989	9	13
Frontier Army Museum Association, 1991-1993	9	14-19
Gemological Institute of America, 1989	9	20
George Washington University, 1985	9	21
Georgia Institute of Technology, 1983	9	22
Georgian Court College, 1989	9	23
Girl Scout Council of Greater New York, Inc., 1994	9	24
Girl Scouts of Central Maryland, 1991	9	25
Girl Scouts of Nassau County, 1991	9	26
Girls and Boys Club of Stamford, Inc., 1987	9	27
Girls' Club of Allentown, 1979	9	28
Girls' Club of New York, 1990	9	29
Glasgow, University of, 1994	9	30
Glendale Memorial Health Foundation, 1989	9	31
Glendale Sanitarium and Hospital, 1960	9	32
Greater Detroit Society for the Blind, 1979	10	1
Greater Kansas City Chapter of the American Red Cross, 1992	10	2
Greater St. Louis Girl Scout Council, 1991	10	3
Greek Orthodox Archdiocese of North and South America, 1980	10	4
Guidance Center, 1992	10	5
Guiding Eyes for the Blind, Inc., 1974	10	6
Harborview Medical Center, 1990	10	7
Harrah Automobile Foundation, 1983	10	8
Hartford Hospital, 1981	10	9
Hartwick College, 1988	10	10
Heart of Missouri Girl Scout Council, 1992	10	11
Heart of Florida Girl Scout Council, 1989	10	12
Hebrew Arts School, 1978	10	13
Historic New Harmony, Inc., 1976	10	14
Historically Black Research Universities Foundation, 1993	10	15
Holly Shores Girl Scout Council, 1989	10	16
Hope College, 1971	10	17
Hospital for Special Surgery, 1990	10	18

CONTENTS	BOX	FOLDER
Hospital of St. Raphael, 1972	10	19-24
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Houston, University of, 1976	10	25
Hunterdon Heritage Conservancy, 1990	10	26
Huntington Beach Public Library, 1989	10	27
Hurricane Island Outward Bound School, 1984	10	28
Illinois Institute of Technology, 1988	10	29
Independent Colleges of Southern California, 1985	10	30
Institute for Shipboard Education and International Association for Shipboard Education, 1989	10	31
Interfaith Medical Center, 1984	10	32
Interlochen Center for the Arts, 1981	10	33
International Baccalaureate, 1989	10	34
International Centre for the Study of the Preservation and the Restoration of Cultural Property, 1987	10	35
International College, 1991	10	36
International Student Center at UCLA, 1984	10	37
International Institute for Environment and Development, 1983-1984	10	38
International Life Sciences Institute, 1994	10	39
Iona College, 1977	10	40
Iowa State University, 1987	10	41
Jackson Laboratory, 1990	11	1
Jackson Park Hospital, 1973	11	2
Jesuit Seminary and Mission Bureau, New York Province of Society of Jesus, 1979	11	3
Jewish Hospital, 1985	11	4
John Jay College of Criminal Justice of City University of New York, 1977	11	5
Joint Center for Political Studies, Inc., 1987	11	6
Joslin Diabetes Center, 1989	11	7
Junior Achievement, Inc., 1994	11	8
Karunya Institute of Technology, 1989	11	9
Kennedy Center, 1973	11	10
Kent School, 1975-1976	11	11
Kenyon College, 1984	11	12
Kickapoo Council of Girl Scouts, 1992	11	13
King's College, 1980-1982	11	14-18
King's College of Cambridge, 1991-1994	11	19
King's College of New York, 1988	11	20
La Alianza Hispana, 1992	11	21
LaSalle Academy, 1988-1992	11	22

CONTENTS	BOX	FOLDER
LaVerne, University of, 1994	11	23
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Las Positas Friendship Park, 1993	11	24
Latin School of Chicago, 1984	11	25
Lawrence Country Day School, 1977	11	26
Lawrence Hospital, 1990	11	27
Lawrence Memorial Hospital, 1972-1975	11	28
LDS Hospital, 1980-1993	11	29-36
LDS Hospital, 1980-1993	12	1-3
Le Moyne College, 1977	12	4
LEAD Program in Business, 1991	12	5
Lehigh Valley Hospital, 1995	12	6
Lewis and Clark College, 1984	12	7
Liverpool John Moores University Trust, 1993-1994	12	8
London, University of, 1991	12	9
Long Island College Hospital, 1977-1979	12	10-13
Long Wharf Theatre, 1989	12	14
Los Angeles County High School for the Arts, 1985	12	15
Los Angeles County Medical Association Regional Poison Information Center, 1981-1987	12	16
Los Angeles County Public Library Foundation, 1991	12	17
Los Angeles Library Association, 1984	12	18
Los Angeles Opera Theater, 1984	12	19
Louisiana Literacy Foundation, 1991	12	20
Louisville, University of, 1994	12	21-22
Loyola College, 1975	12	23
Lutheran Community Services, 1973	12	24
Lutheran Hospitals Foundation, 1988	12	25
Lynchburg General - Marshall Lodge Hospitals, 1973	12	26
Manhattan Eye, Ear & Throat Hospital, 1979	12	27
Mansfield College, 1990	12	28
Marist High School, 1986	12	29
Maryland National University, 1973	12	30
Marymount Manhattan College, 1980	12	31
Massachusetts, University of, 1986	12	32
Massachusetts College of Art, 1981	12	33
Matheny School, 1987-1990	12	34
May Institute, 1992	12	35
McLean Hospital, 1983	12	36
Meharry Medical College, 1989	12	37
Menninger Foundation, 1972	12	38
Mental Health Association in New Jersey, 1993	13	1

CONTENTS	BOX	FOLDER
Miami, University of, 1983	13	2
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Michigan Medical Center, University of, 1971	13	3
Michigan State University, 1973	13	4
Milton Academy, 1976	13	5
Milwaukee Children's Hospital, 1976	13	6
Milwaukee Repertory Theater, 1984	13	7
Minnesota, University of, 1976	13	8
Miriam Hospital, 1982	13	9
Mission San Juan Capistrano, 1993	13	10
Missoula Children's Theatre, 1990-1991	13	11
Missouri - Kansas City, University of, 1979	13	12
Modesto Performing Arts Center, 1988	13	13
Montana, University of, 1983	13	14
Montclair Art Museum, 1980	13	15
Montgomery Bell Academy, 1981	13	16
Montgomery Hospice Society, 1992	13	17
Montreal General Hospital, 1984	13	18
Morehouse College, 1972	13	19
Morris Animal Foundation, 1981	13	20
Morris Center YMCA, 1989-1991	13	21-22
Morristown - Beard School, 1973	13	23
Morristown Memorial Health Foundation, 1983-1992	13	24
Mount Aloysius Junior College, 1980-1982	13	25
Mount de Chantal Academy, 1982	13	26
Mount Mary College, 1991	13	27
Mount Rushmore National Memorial Society, 1988-1989	13	28
Mount Saint Vincent, College of, 1980-1982	13	29-34
Mt. San Antonio Gardens, 1991	13	35
Mount Sinai Medical Center, 1981	13	36
Mountain Prairie Girl Scout Council, 1991	14	1
Mountainside Hospital, 1982	14	2
Muckenthaler Cultural Center Foundation, 1992	14	3
Muhlenberg Foundation, 1990	14	4
Museum of the American China Trade, 1981	14	5
Museum of Broadcasting, 1986	14	6
Music Center of Los Angeles County, 1983	14	7
Mutual Housing Association of Southwestern Connecticut, 1991	14	8
Naleo Education Fund, 1988	14	9
Nathan Adelson Hospice, 1990	14	10

CONTENTS	BOX	FOLDER
National Action Council for Minorities in Engineering, 1988	14	11
Client Files, Brakeley, John Price Jones Inc. (cont.)		
National Air and Space Museum, 1993	14	12
National Archives, 1991	14	13
National Association for the Advancement of Colored People, 1993	14	14
National Broadcasters Hall of Fame, 1979	14	15
National Congress of Inventor Organizations, 1983	14	16
National Council for the Social Studies, 1992	14	17
National Council of Jewish Women, 1978	14	18
National Firearms Museum, 1984	14	19
National Fitness Foundation, 1986	14	20
National Geographic Society, 1988	14	21
National Health Council, 1972	14	22
National Hospice Foundation, 1993	14	23
National Liberty Ship Memorial, 1982	14	24
National Multiple Sclerosis Society Massachusetts Chapter, 1988	14	25
National Museum of African Art, 1986	14	26
National Opinion Research Center, 1986	14	27
National Society of Fund Raising Executives, 1986	14	28
National Trust, 1989	14	29
National Urban Coalition, 1972	14	30
Nautical Heritage Museum, 1984	14	31
Near East Foundation, 1978	14	32
Nebraska, University of, 1976	14	33
New England Medical Center Hospital, 1978	14	34
New Jersey Foundation of University of Medicine and Dentistry, 1984	14	35
New Jersey Institute of Technology, 1994	14	36
New York, State University of, 1976	14	37
New York Botanical Garden, 1974	14	38
New York Eye and Ear Infirmary, 1992	14	39
New York Infirmary / Beekman Downtown Hospital, 1981	14	40
Newark Beth Israel Medical Center, 1981	14	41
Newport Conservancy, 1992	14	42
Nigerian Medical Assistance Corporation, Inc., 1985	14	43
Norfolk Naval Museum, 1973	14	44
Norman Rockwell Museum, 1990	14	45
North Carolina School of the Arts, 1987	14	46

CONTENTS	BOX	FOLDER
North York General Hospital, 1989	14	47
Northern Arizona, Museum of, 1983-1990	14	48
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Northern Lakes Girl Scout Council, 1990	14	49
Northern Rockies Cancer Center, 1987	14	50
Northern Westchester Hospital, 1970-1986	14	51
Northridge Hospital Foundation, 1994	14	52
Norwalk Hospital, 1989	14	53
Notre Dame High School, 1993	14	54
Nottingham, University of, 1994	14	55
Oakland University, 1983	15	1
Occupational Physicians Scholarship Fund, 1994	15	2
Operation Sail, 1976	15	3
Our Lady of Lourdes Memorial Hospital, 1980	15	4
Outward Bound, 1985	15	5
Pace Academy, 1987	15	6
Pace University, 1978	15	7
Pacific Christian College, 1987	15	8
Paddle Steamer Preservation Society, 1988	15	9
Palo Alto Medical Foundation, 1985	15	10
Palos Verdes Peninsula Education Foundation, 1992	15	11
Parents' and Children's Services, 1983	15	12
Paulist Productions, 1983	15	13
Penn Charter School, 1972	15	14
Pennsylvania Sports Hall of Fame, 1990	15	15
Pepperdine University, 1981	15	16
Perkins Center for the Arts, 1989	15	17
Perkiomen School, 1977	15	18
Pestalozzi Children's Village Trust, 1989	15	19
Phelps Memorial Hospital, 1979	15	20-22
Philadelphia College of Pharmacy and Science, 1979	15	23
Phoenix Art Museum, 1991	15	24
Pittsburgh, University of, 1986	15	25
Plainfield Community Health Center, 1990	15	26
Platinum Association, 1991	15	27
Polytechnic Institute of Brooklyn, 1988	15	28
Polytechnic of East London, 1990	15	29
Polytechnic Preparatory Country Day School, 1975	15	30
Ponape Agriculture and Trade School and Peace Foundation, 1985	15	31
Portland State University, 1991	15	32
Powerplant Visual Arts Center, 1987	15	33

CONTENTS	BOX	FOLDER
Presbyterian - University Hospital of Pittsburgh, 1987	15	34
Primary Children's Medical Center, 1986	15	35
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Princeton Club of New York, 1989	15	36
Princeton Day School, 1985	15	37
Princeton Library in New York, 1982	15	38
Princeton Theological Seminary, 1987	15	39
Purdue University, 1978-1981	15	40
Quebec Foundation, University of, 1976-1977	15	41
Queen of Angels - Hollywood Presbyterian Foundation, 1989	15	42
Radcliffe College, 1989	15	43
Reading Is Fundamental, 1987	15	44
Red River Zoological Society, 1994	15	45
Rene Dubos Center for Human Environments, Inc., 1987	15	46
Republic of Liberia, 1974	15	47
Research to Prevent Blindness, Inc., 1973	15	48
Reuben H. Fleet Space Theater and Science Center, 1993	15	49
Robert Gordon Institute of Technology, 1991	16	1
Rochester Philharmonic Orchestra, 1984	16	2
Rockland County Girl Scout Council, Inc., 1993	16	3
Roger Williams General Hospital, 1989	16	4
Rolling Hills Girl Scouts Council, 1988	16	5
Ronald McDonald House, 1989	16	6
Roper Foundation, 1991	16	7
Rowe Camp and Conference Center, 1992	16	8
Royal Ballet School, 1988	16	9
Royal Lyceum Theater Company, 1990	16	10
Rutgers University, 1973	16	11
Sacred Heart University, 1977	16	12
Saginaw Valley State College, 1981	16	13
St. Alban's School, 1983	16	14
St. Andrew's School, 1980	16	15
St. Anne Institute, 1987	16	16
St. Antony's College, 1994	16	17
St. Catherine, College of, 1978	16	18
St. Cross College of Oxford University, 1975	16	19
St. Edward's University, 1992	16	20
Saint Francis College, 1978	16	21
St. James Catholic Church, 1987	16	22
St. Joseph Children's Services, 1990	16	23
Saint Joseph College, 1974	16	24

CONTENTS	BOX	FOLDER
St. Luke's Hospital, 1972	16	25
St. Luke's - Roosevelt Hospital Center, 1985	16	26
Client Files, Brakeley, John Price Jones Inc. (cont.)		
St. Margaret's Episcopal School, 1993	16	27
St. Michael's College, 1988	16	28
St. Olaf College, 1985-1990	16	29
Saint Paul Chamber Orchestra, 1991	16	30
Saint Paul School of Theology, 1990	16	31
St. Peter's Church, 1973	16	32
St. Peter's College, 1992	16	33
St. Raphael, Hospital of, 1970-1981	16	34
St. Scholastica, College of, 1973	16	35
St. Vincent's Hospital, 1977	16	36
Salisbury School, 1982	16	37
Samaritan Medical Foundation, 1981	16	38
San Diego, University of, 1986	16	39
San Diego Historical Society, 1980	16	40
San Diego Hospice, 1991	16	41
San Francisco Ballet, 1980	16	42
San Francisco Zoological Society, 1981-1986	16	43
San Geronio Girl Scout Council, 1991	16	44
Sansum Medical Research Foundation, 1993	16	45
Santa Ana Education Foundation, 1995	16	46
Santa Barbara Museum of Natural History, 1985	16	47
Santa Monica Hospital Medical Center, 1983	16	48
Schools for Christian Education, 1972	17	1
Schools of the Sacred Heart, 1981	17	2
Scottsdale Girls Club, 1988	17	3
Scranton, University of, 1984-1994	17	4
Scuola D'Italia, 1979	17	5
Seton Hill College, 1983	17	6
Seven Lakes Girl Scout Council, 1990	17	7
Sharlot Hall Museum of Arizona History, 1993	17	8
Sheffield Hallam University, 1995	17	9
Sienna College, 1973	17	10
Sierra Club, 1988	17	11
Silver Sage Girl Scout Council, 1990	17	12
Simon's Rock College, 1974	17	13
Sjörädoningssällskapet, 1995	17	14
Skid Row Development Corporation, 1989	17	15
Smithsonian Institution "Buried Mirror" Project, 1987	17	16
Smithsonian Institution Quadrangle Campaign, 1982	17	17-31
Smithsonian Institution Quadrangle Campaign, 1982	18	1-12

CONTENTS	BOX	FOLDER
Society of Manufacturing Engineers Education Foundation, 1987	18	13
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Solebury School, 1975	18	14
South Cook County Girl Scouts, Inc., 1990	18	15
South Florida, University of, 1985	18	16
Southampton University, 1989	18	17
Southern California, University of, 1973-1977	18	18-24
Southwestern Connecticut Agency on Aging, 1991	18	25
Spring Hall Trust, 1994	18	26
Springside School, 1974	18	27
Stanford University, 1970-1972	19	1-10
State University of New York, 1976	19	11
Staten Island Institute of Arts and Sciences, 1972	19	12
Staunton Military Academy Alumni Association Foundation, 1972	19	13
Steel Construction Institute, 1992	19	14
Storm King Art Center, 1989	19	15
Sursum Corda Neighborhood Center, 1977	19	16
Swift Water Girl Scout Council, 1993	19	17
Tampa Bay Performing Arts Center, Inc., 1982	19	18
Tarbuth Foundation, 1978	19	19
Tavistock Clinic Foundation, 1993	19	20
Technical University of Vienna, 1992	19	21
Texas A&M University, 1983-1985	19	22
That Man May See, Inc., 1987	19	23
Tonbridge School, 1991	19	24
TreePeople, 1995	19	25
Trinity College, 1982	19	26
Trinity College of the University of Dublin, 1977-1987	19	27
Trudeau Institute, 1978	19	28
Tulane Medical Center, 1971	19	29
UBA and the National Foundation for Unemployment and Workers' Compensation, 1991	19	30
United Engineering Trustees, 1982	19	31
United Service Organizations, Inc., 1978	19	32
United States Air Force Academy, 1985	19	33
United States Olympic Committee, 1977	19	34
United States Tennis Association, 1986	20	1
University City Science Center, 1976	20	2
University College London, 1992	20	3
University Liggett School, 1976	20	4
Utah Symphony, 1983	20	5

CONTENTS	BOX	FOLDER
Vail - Deane School, 1974	20	6
Vanderbilt University, 1976-1985	20	7
Client Files, Brakeley, John Price Jones Inc. (cont.)		
Ventura County Maritime Museum, 1989	20	8
Vermont State Colleges, 1975	20	9
Victim Support / Greater Manchester Federation, 1991	20	10
Viewpoint School, 1990	20	11
Virginia Commonwealth University, 1979-1983	20	12
Vitam Center, Inc., 1973	20	13
Volunteer Consulting Group, Inc., 1983	20	14
Wabash College, 1973	20	15
Wales, University of, 1992	20	16
Walker School, Ethel, 1983	20	17
Warren Wilson College, 1972	20	18
Washington, University of / College of Engineering, 1984	20	19
Washington Cathedral, 1977	20	20
Wayland Academy, 1977	20	21
Waynflete School, 1985	20	22
Webb Schools, 1985	20	23
Weber State College, 1986	20	24
West Chester State College, 1979	20	25
West Virginia Basic Skills Initiative, 1991	20	26
West Virginia University Foundation, Inc., 1981-1989	20	27
Western Carolina University, 1991	20	28
Western Michigan University, 1974	20	29
Westminster, University of, 1993	20	30
Westport Public Library, 1994	20	31
Wheelock College, 1985	20	32
White Mountain School, 1984	20	33
Whitechapel Art Gallery, 1988	20	34
Wilderness Council, 1982	20	35
Wildwood School, 1990	20	36
William and Mary, College of, 1974	20	37
William Carlos Williams Center for the Arts, 1987	20	38
Williston Northampton School, 1983	20	39
Witten / Herdecke Universitat, 1992	21	1
WMHT Educational Telecommunications, 1990	21	2
Women's Resource Center of Scranton, Inc., 1989	21	3
Wooster, College of, 1979	21	4
Working for Childcare, 1991	21	5
World Energy Conference, 1988	21	6
World School for New Jazz, 1992	21	7
Wyoming, University of, 1982	21	8
Yard School of Art, 1991	21	9

CONTENTS	BOX	FOLDER
Yeshiva University, 1980	21	10
Zululand, University of, 1983	21	11
Client Files (cont.)		
Brakeley & Roberts Limited, 1952-1953		
College of Dental Surgeons of the Province of Quebec, 1953	21	12
Institute of Chartered Accountants of Quebec, n.d.	21	13
MacNaughton, Alan, n.d.	21	14
National Breweries Limited, 1952	21	15
G. A. Brakeley & Company, 1948-1970		
Acadia University, n.d.	21	16
Canadian Foundation for Independent Boys' Schools, n.d.	21	17
Cape Cod Hospital, 1968	21	18
Carleton University, 1960	21	19
Loyola Academy, 1970	21	20
McGill University, 1948-58	21	21-23
Metropolitan Toronto Association for Retarded Children, 1960	21	24
New Brunswick, University of, 1956	21	25
Oakville - Trafalgar Memorial Hospital, 1960	21	26
Ottawa, University of, 1959	21	27
Queen's University, 1955	21	28
Syndicat Touristique du Lac - St - Jean, 1956	21	29
Toronto, University of, n.d.	21	30
Trinity College School, 1956	21	31
Western University, 1958	21	32
John Price Jones Company, Inc., 1928-1971		
A. Barton Hepburn Hospital, 1961	21	33
Academy of Natural Sciences of Philadelphia, 1935-1971	21	34-38
Academy of Natural Sciences of Philadelphia, 1935-1971	22	1-6
Alaska Festival of Music, 1960	22	7
American Association for Middle East Studies, 1962	22	8
American Cancer Society / New York City Cancer Committee, 1947	22	9
American Foundation for Pharmaceutical Education, 1961	22	10
American Friends of the Alliance Israelite Universelle, 1963	22	11
American University of Beirut, 1967	22	12
American Youth Hostels, Inc., 1959	22	13
Amherst College, 1961	22	14
Anglo - American - Hellenic Bureau of Education, 1959	22	15
Arkansas, University of, 1966	22	16
Art Students League of New York, 1966	22	17

CONTENTS	BOX	FOLDER
Arts Council, Inc., 1965	22	18
Asia Foundation, 1968	22	19
Association for International Development, 1965	22	20
Client Files, John Price Jones Company, Inc. (cont.)		
Austen Riggs Center, Inc., 1968	22	21
Bard College, 1957	22	22
Barnard School for Boys, 1960	22	23
Baylor University, 1960	22	24
Belgian American Educational Foundation, 1968	22	25
Bellarmino - Ursuline College, 1968	22	26
Berkshire Farm for Boys, 1959	22	27
Big Brothers, Inc., 1964	23	1
Boston College, 1971	23	2-4
Boston Museum of Science, 1958	23	5-6
Bowling Green State University, 1967	23	7
Boy Scouts World Bureau, 1970	23	8
Bradley University, 1967	23	9
Browne and Nichols School, 1958	23	10
Bucknell University, 1958	23	11
Cancer Care, Inc., 1957	23	12
Canisius College, 1967	23	13
Carleton College, 1957	23	14-15
Carlow College (previously Mount Mercy College), 1965	23	16
Casa Colina Rehabilitation Center, 1964	23	17
Catholic Digest, 1955	23	18
Chicago Mayor's Committee for Economic and Cultural Development, 1966	23	19
Children's Hospital of Philadelphia, 1964	23	20
Choate School / Rosemary Hall, 1969	23	21
Citizens' Union of the City of New York, 1952	23	22
Clarke College, 1960	23	23
Cody Center of Western Americana, 1961	23	24
Coe College, 1963	23	25
Colgate University, 1971-1972	24	1-5
Columbia University Alumni Fund Committee, 1946	24	6
Columbia University Arts Center, 1952	24	7
Columbia University College of Pharmacy, 1958	24	8
Columbia University College of Physicians and Surgeons, 1951	24	9
Columbia University School of Engineering, 1950	24	10
Connecticut College, 1966	24	11
Corcoran Gallery of Art, 1967	24	12
Council on Opportunities in Selling, Inc., 1963	24	13

CONTENTS	BOX	FOLDER
Cystic Fibrosis Research Institute of Pennsylvania, Inc., 1962	24	14
De Cordova and Dana Museum and Park, 1956	24	15
Deerfield Academy, 1928-1964	24	16-18
Client Files, John Price Jones Company, Inc. (cont.)		
DePauw University, 1964	24	19
Diabetes Foundation, Inc., 1961	24	20
Dickinson College, 1963	24	21
Drew University, 1964	24	22
Duke University, 1965	24	23
Educational Broadcasting Corporation, 1965	25	1
Eisenhower College, 1963-1967	25	2
Eisenhower Exchange Fellowships, Inc., 1961	25	3
Elmira College, 1950	25	4
Emergency Shelter, Inc., 1971	25	5
English-Speaking Union, 1965	25	6
Fairchild Tropical Garden, 1969	25	7
Foreign Policy Association, 1957	25	8
Foxcroft School, 1970	25	9
Franklin Publications, Inc., 1963	25	10
General Theological Seminary, 1957	25	11
George Washington University Alumni, 1946	25	12
Georgetown University, 1963	25	13-14
Gilman School, 1969	25	15
Girls Clubs of America, Inc., 1960	25	16
Goodwill Industries of Southern California, 1963	25	17
Hamline University, 1966	25	18
Harding College, 1950-1954	25	19
Harlem Preparatory School, 1969	25	20
Harvard Fund Council, 1948	25	21-22
Harvard School, 1962	25	23
Hillsdale College, 1966	25	24
Holland - America Line / Chapman College, 1967	25	25
Idaho, College of, 1964	25	26
Immaculate Heart College, 1962	25	27
Iona College, 1960	25	28
Johns Hopkins Fund, 1970	26	1
Juilliard School, 1969	26	2
Kenmore Mercy Hospital, 1968	26	3
Knoxville College, 1972	26	4
Lawrence University, 1971	26	5
Le Moyne College, 1966	26	6
Limestone College, 1968	26	7
Lincoln University, 1962	26	8

CONTENTS	BOX	FOLDER
L'Institut Edith Cavell - Marie Depage, 1969	26	9
Loma Linda University, 1961	26	10
Loyola University, 1960	26	11
MacMurray College, 1967	26	12
Client Files, John Price Jones Company, Inc. (cont.)		
Magic Circle Industrial Council, 1951	26	13
Manhattanville College, 1968	26	14
Mannes College of Music, 1957	26	15-16
Marmion Military Academy, 1959	26	17
Marquette University, 1959	26	18
Maryknoll Hospital, 1959	26	19
Maryland Baptist College, 1967	26	20
Masters School, 1951	26	21
Mayo Foundation, 1967	26	22
Merrill - Palmer Institute, 1956	26	23-24
Mills College, 1950	27	1
Mississippi, University of, 1961	27	2
Monmouth College, 1969	27	3
Montclair Art Museum, 1970	27	4
Monticello College, 1967	27	5
Moravian Seminary for Girls, 1958	27	6
Museum of the City of New York, 1936	27	7
National Association for Mental Health, 1952	27	8
National Committee for Industrial Mission, 1968	27	9
National Football Foundation, 1966	27	10
National Fund for Science and Engineering Education, 1957	27	11
National Lumber Manufacturing Association, 1958	27	12
National Multiple Sclerosis Society, 1954	27	13
National Recreation Association, 1955	27	14
New England College, 1968	27	15
New England Conservatory, 1963	27	16
New Jersey Symphony Orchestra, 1964	27	17
New York Academy of Sciences, 1965	27	18
New York City Mission Society, 1961	27	19
New York Eye and Ear Infirmary, 1962	27	20
New York Polyclinic Medical School and Hospital, 1958	27	21
New York World's Fair 1939, Inc., 1936	27	22
North Shore Country Day School, 1958	27	23
Norwegian - American Museum, 1965	27	24-25
Notre Dame University - Philippines, 1960	27	26
Ohio University Graduate School of Administration, 1967	27	27
Oklahoma, University of, 1962	27	28
Oklahoma Christian College, 1966	28	1

CONTENTS	BOX	FOLDER
Old Met Opera House Corporation, 1966	28	2
Old Slater Mill Museum, 1963	28	3
Old Sturbridge Village, 1958-1968	28	4-5
Orme School, 1963	28	6
Client Files, John Price Jones Company, Inc. (cont.)		
Parker School, 1956	28	7
Parsons College, 1965-1966	28	8
Pepperdine College, 1959	28	9
Philadelphia Child Guidance Clinic, 1965	28	10
Phillips Academy, 1936	28	11
Phillips Exeter Academy, 1965	28	12
Pomona College, 1962	28	13
Porter-Gaud School, 1970	28	14
Portland, University of, 1964	28	15
Project Concern, 1966	28	16
Providence College, 1966	28	17
Regis College, 1962	28	18
Roberson Memorial Center, 1963	28	19
Rochester Museum of Arts and Sciences, 1960	28	20
Roosevelt University, 1958-1969	28	21-22
Rosary Hill College, 1958	28	23
Saint Benedict's College, 1959	28	24
Saint Francis College, 1968	28	25
St. John's College, 1965	28	26
St. John's School, 1963	28	27
St. John's University, 1959	28	28
St. Joseph's Collegiate Institute, 1968	29	1
St. Lawrence University, 1959	29	2
St. Louis University, 1957	29	3
Saint Mary's College, 1955	29	4
St. Mary's University, 1964	29	5
St. Norbert College, 1957-1970	29	6-7
St. Raphael, Hospital of, 1970	29	8
St. Stephen's Episcopal School, 1965	29	9
Saint Teresa, College of, 1959	29	10
Saint Xavier College, 1970	29	11
St. Xavier High School, 1962	29	12
San Diego, University of, 1968	29	13
Scranton, University of, 1941	29	14
Seamen's Church Institute, 1959	29	15
Silver Hill Foundation, 1970	29	16
Simpson College, 1960	29	17
Southern California, University of, 1960	29	18-19
Southern Methodist University, 1964	29	20

CONTENTS	BOX	FOLDER
Sweet Briar College, 1951	29	21
Third Street Music School Settlement, Society of the, 1964	29	22
Trinity Church, 1958	29	23
Client Files, John Price Jones Company, Inc. (cont.)		
Trinity College, 1964-1970	29	24-25
Trinity Education Center, 1966	29	26
Tuskegee Institute, 1961	29	27
United Board for Christian Higher Education, 1958	30	1
United Cerebral Palsy League of Union County, New Jersey, 1971	30	2
United Presbyterian Church Synod of California, 1959	30	3
United States Equestrian Team, 1962	30	4
United Student Aid Funds, Inc., 1960	30	5
Upsala College, 1968	30	6
Visiting Nurse Service of New York, 1958	30	7
Wabash College, 1960-1965	30	8
Washington Cathedral, 1945	30	9
Wellesley College, 1946	30	10
Wesley Theological Seminary, 1961	30	11
Wheeling College, 1966	30	12
Yale - in - China Association, 1958	30	13
Woodrow Wilson Foundation, 1959	30	14
Young Women's Christian Association of White Plains and Central Westchester, 1961	30	15
John Price Jones Company (Canada), Limited, 1950-1954		
Canadian Breweries (Quebec), Ltd., 1952	30	16
Canadian National Institute for the Blind, 1953	30	17
Joint Hospital Building Fund, 1953	30	18
L'Hopital Sainte-Justine, 1950-1954	30	19-20
Laval University, 1951-1952	30	21
McMaster University, 1953	30	22
Public General Hospital, 1951	30	23
Queen Alexandria Solarium for Crippled Children, 1954	30	24
St. Michael's College, 1952-1953	30	25
Tanners Association of Canada, n.d.	30	26
Toronto General Hospital, 1951	30	27
Young Men's Christian Association of Montreal, n.d.	30	28
Robert Johnston Company, 1969-1970		
Boy Scouts World Committee, 1970	31	1
Freedom of Information Center, 1970	31	2
Gonzaga University, 1969	31	3
Institute of Medical Sciences, 1970	31	4
Plymouth 350 th Anniversary Committee, 1969	31	5

CONTENTS

San Fernando Valley Christian School, 1970
Universidad Autonoma de Guadalajara, 1970
Université Catholique de Louvain, 1970

BOX	FOLDER
31	6
31	7
31	8