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George A. Brakeley, Jr.

Papers, 1928-1995

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George A. Brakeley, Jr., Papers, 1928-1995

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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

Presented by George A. Brakeley, Jr., Indianapolis, IN, October 1997. A1996-10.

Processed by Michael A. Piper, February 1998.

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

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