

FROM GRANTEE TO GRANTOR

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What I would like to do today is describe an experiment, a sort of pilot study. For about thirty years my research activities were supported by grants through the University of Toronto and with this meeting in mind I went back through these years and reflected on the variety of these grants. But don't panic: I am not going to tell you about all of them!

The first one I received was in 1940. It was obtained by the head of the department to enable me to produce a monograph. I was a very recent and completely unknown Ph.D. The grant was for four hundred dollars. This was the most exciting grant I ever received. The monograph was produced. It sold a handful of copies but complimentary issues found their way into several libraries. It so happened that it was the first statement in this particular area of psychology in Canada and set off a chain of lively research which continues to this day.

As I traced forward the subsequent grants I received I found that from 1953 to 1958 the Institute of Child Study worked under federal health grants totalling approximately one million dollars. These were given to that controversial figure, the late Dr. W. E. Blatz, who said to me in his own inimitable way: "Now I've got the money. You organize the staff and report to the authorities each year." So my job became that of organizing the research staff and each March submitting reports by which we hoped to get the grant renewed for the following year. We might or we might not; so I know well that feeling of insecurity (referred to by several of the grantees on the panel) that comes from being financed by grants.

The Institute and its staff survived on grants. The most beneficial to me were those received from the Ontario Mental Health Foundation. These continued after the structure of the Institute changed and the emphasis on research diminished but research is still emerging from them. So much for my thirty years' experience as a grantee!

By one of the fortuitous circumstances in life I became the primary beneficiary of my Father's estate and fell heir to the controlling interest in his company. This took me quite by surprise for most of my life had been spent in that loftiest of the university ivory towers — the department of psychology. My cousin said to me, rather firmly, I thought: "Look, the longer you try to carry on the business the more money you will lose. Why not lose it properly, with tax advantages? Why not put it in a charitable trust?"

This seemed to me to be an excellent suggestion for, if we created our

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own charitable trust, then we could try to evolve ways and means of overcoming all the problems I had encountered as a grantee. And so in 1964 we went to our lawyer, had the company liquidated and created a trust with myself as Settlor to do the things I wanted it to do. These are explained in the preamble to the trust deed:

“WHEREAS the Settlor is active in work and research in the field of education and wishes to aid in its further encouragement and development;

AND WHEREAS it is the opinion of the Settlor that:

- (a) there is general need for interim and supplementary financial assistance which is available quickly and without undue formality;
- (b) there is scope for an independent body to augment work already being done and supplement it by means of sympathetic encouragement, co-ordination and direction;
- (c) the role and achievements of the independent body within the field of education is in itself an appropriate subject and experiment;

NOW THEREFORE THIS INDENTURE WITNESSETH”

And so we set up a small Trust. Much has been said today about the reluctance of charitable foundations to make public disclosure of their financial resources. I have no reluctance about this. My Trust was capitalized at \$100,000 which someone at the time said was very small. I may say that, having been a university professor, I thought it was very large! We called it the Neathern Trust which is an old family name from Devonshire. In addition to the trustees we have an Advisory Board chosen as much for their sympathetic interest in research and researchers as for their “know-how” in many disciplines — psychology, medicine, law, music, nursery work, education.

As I have said, this is a small trust and today it has been said that small trusts are undesirable but I wonder if at times it is not more important to have five hundred dollars when you need it than fifty thousand dollars six months hence. Is this my experience as a grantee showing?

To what extent, you might ask, have we succeeded in doing what we set out to do? Next year we hope to report and evaluate our efforts of the first ten years. To the present the Advisory Board has recommended eighty-three projects of which the trustees have rejected only three. Here is a sample.

One grant from the Trust provided play equipment for the tracheotomy ward at the Hospital for Sick Children. The hospital receives many grants but one of our Board members was working on this ward and found that the children had really nothing to play with. Nothing in the current budget would allow play equipment to be purchased. So these children were just

sitting — inactive. We gave a grant of one thousand dollars to get play material introduced. The more important fact was that our Board member, experienced in play with young children, could advise the staff on equipment and help the children learn how to use it. Here was involvement!

Another activity: just the other day we had one of those “rush things”: somewhat “off beat”. A Ph.D. student was doing a study on the effects of meditation on learning. Now I would have to tell you that meditation is not an “in” thing in scientific investigation. This poor young man had been spending money out his very small salary to buy psychological tests to find out what the people who meditated had learned. He had no more money. He needed \$250. He applied to us. We thought that this was a search into new territory. Even if he concluded from his study that nobody learns anything through meditation, that, it seemed to us, would be worthwhile. His money was available in less than two weeks.

A very interesting project in which we became involved was the one described to you by Professor Flint. Her longitudinal studies were afflicted with a series of financial emergencies. There were gaps between her grants from large foundations which made it very difficult for her to retain her staff. She applied to us for interim grants. We made our first one and shortly thereafter a large granting body came through retroactively and we got our money back! So when Professor Flint made a similar request a few months ago, we approved it. This time we did not get our money all back but we did get some. Probably if she asks again, we won't get any of it back but who cares. The point is, she has been able to sustain a very worthwhile project in this rather peculiar fashion.

Another project was this. A hospital was able to get a microfilming camera through the government but there was no way either through government or from their budget that they could get a reader. What use is a microfilming equipment at a cost of fifty thousand dollars without a reader at a cost of one thousand dollars? Again we were able to pick up a small but nonetheless essential need.

Finally, a project which is rather a long story. We went to a cottage on Harbour Island in the Bahamas for several Christmases and one year were invited to the opening of their Day Nursery. Our visits became busman's holidays; we became involved. Through the Trust we were able to help with equipment but, more important than that, we were able to bring a native woman to Canada and arrange for her to take a two year course in early childhood education at one of our community colleges. She returned to supervise the nursery on her own island and subsequently was appointed to the Department of Education of the Bahamian government to advise on preschool education.

I have given you glimpses of a small Trust in action. You will see that we have tried to act quickly, sympathetically and with involvement. The interest, skill and objectivity of some member of the Board who has in-

telligent understanding of a project is as important often as the grant itself. And, of course, one must always be conscious of the boundaries between involvement and interference and tread lightly. So really, you see, we are conducting an experiment too, our own experiment in what a small trust can do. And at the end of the first ten years I think I can put it very simply — a great deal in terms of both people and projects.