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AN EXTENDED CASE STUDY IN PLANNING IN A HUMAN SERVICES AGENCY:
A HISTORY OF HUMAN SERVICES OF MORGAN MEMORIAL GOODWILL
INDUSTRIES, INC.

A Dissertation Presented

by

WILLIAM THOMAS Mc CARRISTON, JR.

Submitted to the Graduate School of the
University of Massachusetts in partial fulfillment
of the requirements of the degree of

DOCTOR OF EDUCATION

May 1991

School of Education

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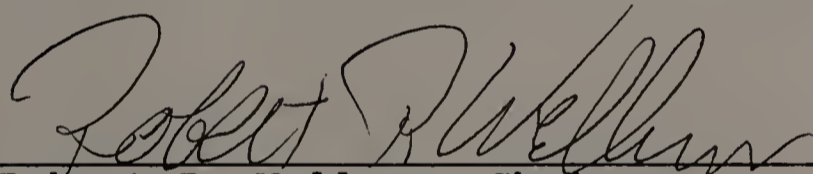
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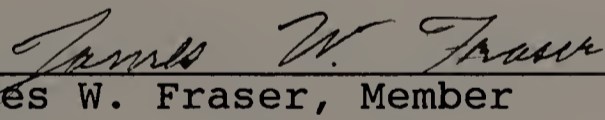
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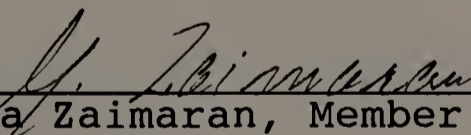
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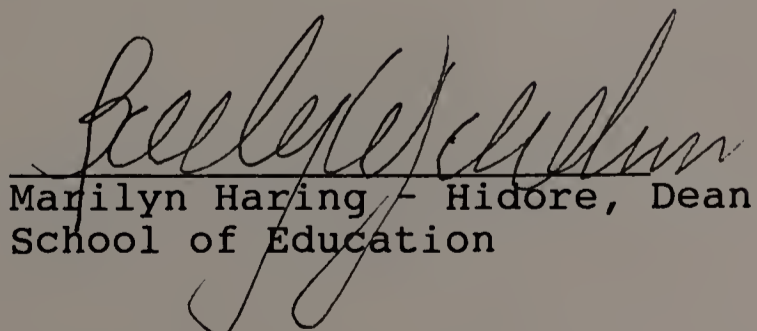
Robert R. Wellman, Chairman



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Raza Zaimaran, Member



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DEDICATION

This work is dedicated to the tens of thousands of persons who come daily to Goodwill Industries throughout the world seeking, "Not Charity, but a Chance."

ACKNOWLEDGEMENTS

I must express my gratitude to my committee, Raza Zaimaran, James Fraser, and Robert Wellman for their patience and guidance during the development and execution of this work. In particular Robert Wellman for his constant encouragement toward its completion.

I must also acknowledge the contribution of Winston Thompson at whose insistence I began this program of study, and whose constant support has been instrumental in its completion.

In my pursuit of the history of Morgan Memorial, Rev. Henry E. Helms, former Executive Director and now archivist has been a most valuable resource of materials for which he has lovingly cared for an entire life time. He has been of outstanding assistance in locating relevant and significant data as well as an outstanding source of oral history.

Emil M. Hartl, Ph.D. also of Morgan Memorial has not only been a strong mentor in the development of human services at Morgan Memorial, but also a personal inspiration in the execution of this work. His historical perspectives of the early days of professional service delivery have been most helpful.

Another acknowledgement due Morgan Memorial is to the outstanding and dedicated staff who have provided the material upon which this work could be based.

The final acknowledgement is to my editor, research assistant, critic, and prompter, Ms. Nanci Kendall, my wife, without whose unselfish sacrifices of time and companionship, this work would not be.

ABSTRACT

AN EXTENDED CASE STUDY IN PLANNING IN A HUMAN SERVICES AGENCY:
A HISTORY OF HUMAN SERVICES OF MORGAN MEMORIAL GOODWILL
INDUSTRIES, INC.

MAY 1991

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This work examines planning as a determinant in the development of human services at Morgan Memorial Goodwill Industries, Inc. of Boston Massachusetts. The lives of the founding fathers are examined as are times of the founding of the organization. The philosophical development of Morgan Memorial and Edgar James Helms is related.

Presented are the successes of the agency, its failures and opportunities lost throughout its 95 year history, against planning where evident. The work is a chronology of the founding, early life, maturing of the agency and concludes in with the development of present day services.

Research materials included the organization's published annual reports, board of directors' meeting minutes, autobiographical and collateral historic materials. Oral history from Rev. Henry E. Helms, Emil M. Hartl, Ph.D., and observations by this writer in more than twenty years with Morgan Memorial are also incorporated.

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I BEGINNINGS

Methodology

The purpose of this work is to examine the history of the development of human services in Morgan Memorial Goodwill Industries, Inc. including its successes, failures, strengths and weaknesses against a tapestry of planful development, opportunism, or the impact of chance.

Where there is concrete evidence of formalized planning in the organization's history is will be so noted.

The historical presentation will be developed chronologically, beginning with a somewhat detailed examination of the life of Rev. Henry Morgan and Dr. Edgar J. Helms .

Chapter I

In addition to the methodology and purpose of this work, Chapter I will give the reader a sense of the underlying dynamics and values from which the organization was developed. In the lives of each of the founding fathers there shall be an attempt to examine critical life choices against a background of planned action and its subsequent outcome.

There are several times, both in the lives of the founding fathers of Morgan Memorial and in the life of the

organization when it nearly ceased to be, lost opportunities for growth, or simply made poor decisions.

It is expected that the reader of this extended case study will learn that planning in a human service agency is vital to its orderly growth and survival.

In the forward of the Goodwill Industries of America publication, Strategic Planning for Local Goodwill Industries, is a synopsis of the rationale for this process.

"Management authority Peter Drucker has described strategic planning as 'the continuous process of making present entrepreneurial (risk-taking) decisions systematically, with the greatest knowledge of their futurity... it is the application of thought, analysis, imagination and judgement. It is not masterminding the future. Strategic planning is necessary precisely because we cannot forecast.'¹

The Introduction of the publication reads:

"In the fluctuating climate of nonprofit business, social and economic activity today, an organization cannot avoid making decisions that, ultimately, decide its future and the future of those the organization seeks to serve. Consciously or unconsciously, formally or informally, every person and every group makes choices that influence long-term outcomes. Exercising selection is inevitable. Most major decisions are felt throughout the agency; every division, every department, every employee, every client will feel their effects. Furthermore, these repercussions often echo far into the future.

Strategic planning isn't just wise, it's essential. Companies which accurately forecast business conditions can plot a safe course for the future. Those that don't can only react.

The same need exists for nonprofit human service agencies. The need for intensive planning within the nonprofit world has grown rapidly in the last few years. Managers must plan for projected changes. They must consider inflation, recession,

scarcity of resources, funding shifts, and changing perceptions of community need. At the same time, because many organizations have grown larger, managers and boards must deal with more variables than in the past. All these factors combine to make planning more complex, yet more essential, than ever before.

For Goodwill Industries, the situation is no less complicated, nor is planning any less necessary. Planning involves a different type of mental process from that generally employed in dealing with day-to-day operating problems.

The talents required for first-rate planning are not always plentiful in most organizations, and management must find ways to improve planning capabilities. One way is to help staff to meet the intellectual requirements for effective planning by providing training in the concepts underlying planning and the steps involved in applying the strategic planning process -- knowledge must be increased, skills developed, attitudes changed, and values redefined."²

Chapter II

Chapter II will deal with the years of Morgan's Chapel prior to the birth of Morgan Memorial Goodwill Industries, Inc.

In addition to presentation of the history of the early settlement house work, a brief exposition of the treatment of poverty throughout the Judeo-Christian era will be presented. Helms early efforts to clean up vice and crime will also be seen.

The struggles of a small band of missionaries of the Methodist Church in the face of severe social and economic problems will be brought out as major influencers in the shaping and founding of Goodwill Industries, the needs it was

founded to meet, and the manner in which that need was actually met.

Simply stated, Chapter II will deal with the experiences, historic and present leading to the development of the philosophy of Goodwill and its understanding of how to meet human need.

Chapter III

Chapter III will deal with the early years of Goodwill. The implementation of the philosophy developed in Chapter II in tangible terms, implications of the philosophy and its early spread throughout the United States.

International recognition helped Helms spur replication of this work, and helped him derive substantial financial support from the Home Mission Service of the United Methodist Church.

We shall also see how this self same support nearly consumed the organization and nearly created a sectarian institution.

While institutional support was most significant, there were major individual supporters, though but a few, they were very instrumental in the capital development of the organization. Their contributions greatly assisted Helms develop much needed physical facilities.

Chapter III will end on the brink of the Great Depression, 1929.

Chapter IV

Chapter IV will present Morgan Memorial's metamorphosis from a deeply church oriented relief organization through its first formal involvement with government during the Great Depression, its assistance of the "War Effort" during World War II, and to the opportunities lost in the post WWII era to provide rehabilitation services to returning disabled veterans. The services offered by Morgan Memorial, changes in its leadership, and national trends of this period will be explored.

Since the end of this period is the precursor of today's programs, substantial material will be put in place to expose the foundations of today's programs. The work of Rev. Henry E. Helms and Dr. Emil M. Hartl are most significant at this juncture because it brought together resources from throughout New England and from the federal government to establish "professional rehabilitation services" at the New England Rehabilitation-for-Work Center.

Chapter V

Chapter V will point out the development of the professional rehabilitation center at Morgan Memorial and at its branch locations. It will deal with the crisis of 1970 and its impact on programs, changes made at the Charles Hayden Goodwill Inn School, physical plants, locations of service,

and philosophical changes. A history of the evolution of each program will be detailed in this chapter.

Requirements in organizational philosophy, decisions of the management and board of directors will provide a context for the involvement of Morgan Memorial Goodwill Industries and government in the development of programs as they exist today.

Research Material

In addition to the attached bibliography, this work shall use the archives of Morgan Memorial with the assistance of Rev. Henry E. Helms, retired Executive Director, now Archivist and Historian. Rev. Helms has permitted me access to much of the early material of his father and of Henry Morgan.

In addition to the written records which are soon to be transferred to the Boston University Archives, Henry Helms himself is a wonderful source of the oral history of Morgan Memorial, son of the founder and Chief Executive for twenty-six years. In addition to Rev. Helms, Dr. Emil Hartl, founder of the Hayden Goodwill Inn School is an excellent source of oral history of the development of modern programs and services of the organization. Also, this writer was employed for twenty two years in varying senior staff capacities in the organization from 1967 to 1989, leaving to assume the presidency of Asgard Goodwill Industries in Traverse City, Michigan. In addition to the above sources of history there is a plethora of publications of the organization, minutes of

Board meetings, and annual reports which date to nearly its founding. Sources of material deemed relevant by this writer will be used to portray this history.

As previously stated, the critical portion of this work shall lie in the evaluation of plan versus outcome where discernable.

Definitions

Human Services: In the context of this dissertation this shall mean any service which purports to meet a basic need of persons. Included in this definition shall be the provision of basic services to persons to meet survival in a physical and psychological, social and economic sense.

Vocational rehabilitation: In this work the writers intent here is to convey the meaning of a planful delivery of a variety of services which result in employment of disabled or disadvantaged persons.

Plan/planning: That group of activities preceding a contemplated action which attempts to ascertain the impact of the proposed action in a selected environment at some point in the future.

Outcome: The apparent effect of an action or series of actions in a particular environment, generally observable phenomena resulting from an action.

The Beginning

Frederick C. Moore stated in 1952,

"...one cannot but believe that always when there is the desire for service on the part of the individual and the institution, there develops a plan. It may not always be clear, but, if there is a desire for service there are the 'golden threads' of Providence which weave themselves by God's help into a plan. This is certainly very true in connection with the leadership of Dr. Helms in the development of the Goodwill Industries and the work of Morgan Memorial."³

While Moore attributes much to Dr. Helms and to Providence in the work of Morgan Memorial, most of its founding conceptual development can be seen in the work of John Wesley demonstrated by the New York Methodist Episcopal Church of America's Five points Program of the 1850's: child care, day nursery, employment bureau, chapel/church services and an industrial component.⁴

At the same time that the Five Points Mission and Industry were being developed, a preacher arrived in Boston from circuit riding in Connecticut, Henry Morgan, P.M.P. (poor man's preacher).

This unordained preacher actually began the work in Boston which was to carry his name.

Founding Fathers

Henry Morgan, P.M.P. (1825-1884)

Morgan Memorial bears the name of Henry Morgan and is a fitting memorial to this highly successful worker for

temperance and for the poor. While a lifelong Methodist, inspired by the circuit riders of the early nineteenth century, much of Morgan's early dedication to God and repugnance for poverty came early in his own life.

Born in Newtown, Connecticut on March 7, 1825 to a modestly successful carpenter and his wife, Henry learned early of the lessons of poverty when at age five, typhoid fever struck his family, killing his father and seriously weakening his mother. Unable to keep up the mortgage payments on their modest home built by Henry's father, the family was evicted following foreclosure on the house. The impact on a five year old was life-long as Morgan writes in his autobiography,

"It was midwinter. The day had come when we were to be turned into the street. The snow was deep, the winds were furious, and piercing was the cold; but the elements were not so severe as the inhumanity which was ejecting us into the pitiless blast. We had no redress. Go we must, go we did."⁵

They moved all of their possessions through the snow to an abandoned store which was in great disrepair. This was to be his boyhood home.

Morgan's consecration to the service of the poor came very early. Shortly after arriving at their new home, his mother fell ill again for a period of time. Of this Morgan writes,

"Suddenly she came to her senses saying, 'I will not despond! Though he slay me yet will I trust in Him! Never too poor to pray! never too weak to win! I will hope against hope. I will live for thee, my brave boy, brave beyond thy years. You have

cheered your poor mother's heart, filling her soul with joy!" Then placing her hand fondly on my head she continued: 'A mother's shadow be over thee and protect thee as a wing of the Almighty.' There was I consecrated to poverty and the storm."⁶

Despite the major upheaval of his very early life by poverty, it appears that the next ten years at Newtown were reasonably happy and secure for young Henry, to the point of being able to complete his education at age sixteen at Dwight's Academy in Greenfield Hill Connecticut after which he apprenticed briefly in a lawyer's office.⁷

Having determined that he should be a teacher rather than become a lawyer, Morgan returned to Fairfield County, Connecticut; where, after several rejections, due principally to his gaunt, gangly and youthful appearance, he secured a teaching position in Hopewell for the salary of one dollar per week and his keep at the school commissioner's home. His first class consisted of seven students, which number grew rapidly to thirteen. Families of his students were delighted that their children were actually getting an education. Morgan's fame spread throughout the county. He moved on to the Banks School District then returned to Dwight's Academy. It was during his tenure at Dwight's that he experienced his conversion to Methodism. The company at Dwight's was Congregationalist, and Morgan was influenced to lean in that direction until the time of his conversion. Chance, here, appears to be the major factor rather than early influence or careful plan.

"I was awakened to a sense of guilt and condemnation under the preaching of the Methodists who were holding a protracted meeting several miles from the place where I was teaching; but I resorted to every expedient to quench my convictions, until the Congregationalists from Greenfield Hill, formerly Dr. Dwight's Church, appointing a meeting in my own district. In a private house, on Sunday evening, there was a great crowd, an old man made a remark in the earnestness of his speaking, against which, after the meeting I took exceptions. On the way home that meeting was the object of my ridicule. And I suppose assisted by the evil one, to drown my convictions, and shake off religious restraint, I was ruder than I intended. For in the midst of railing, as if Satan might rebuke Satan, the wildest young man in town came to me and said in jesting, 'Morgan, this is too bad; you are the hardest case that walks the streets; you better repent or be damned.' If I had been shot, I could not have reeled sooner out of ranks. I knew he was jesting; but God chose it as an arrow piercing my soul, which should never be extracted except by Jesus. I flew from the company, jumped over the fence and trod over fields, over the marshes, over the brambles and hedges, not knowing whither or for what, but that I must go onward and still onward.... Towards day I returned to my room, and waited on the Lord till the dawn of the morning, when I found some little relief, but no assurance. There was to be a meeting at Dwight's old Academy, and I resolved to go. The deacon knew the state of my feelings, and told me if I wanted an active faith I must exhibit some action in taking up the cross. He requested me to kneel down by his side, and after him to pray. It was a great cross; but I at last consented. I had said but a few words before the light broke in upon my soul. And there, as one walking in darkness, I saw a great light, and there was broken from me the yoke of my burden."⁸

Shortly after his conversion, Henry Morgan was called to teach at Dwight's. Here he offered his first public prayer, read his own commentary on scriptures, and made his first speech. This was obviously a time of comfort and growth in Morgan's development. Of the period Morgan writes,

"Around the Academy there were other associations of hallowed interest. There , as a teacher and a preacher, President Dwight had left a halo of glory; and the associations connected with his teachings...."⁹

Perhaps the only discordant note observed by Morgan was,

"However soon after my conversion, as might be expected, the members of the church treated me with a little coldness, because I joined the Methodists."¹⁰

The significance of this choice, unplanned occurrence, - chance happening is extremely important in the development of Morgan Memorial and the two hundred-twenty Goodwill Industries world-wide. As we shall see later, without the ongoing substantial financial support of an institution organized as the Methodist Church, there would be no such organization today as Goodwill Industries.

Morgan's transition from teaching to preaching was far more planned than his conversion to Methodism. As a youth, he would see pictures of local circuit riders on the walls of his childhood home. His mother was one of a large number of persons who viewed the "saddle-hardened" preachers as local heros. He recognized his success in teaching.

For seven years, though teaching much of the time, he made the art of persuasion his chief study. The schoolroom was the theater for his practice; and without the use of rod, he commanded strict obedience, and poured such enthusiasm into the young hearts of his pupils as was rarely witnessed. Midnight and sunrise often found them at their studies; and such was the ardor of their young minds, that their parents were often compelled to interpose for the safety of their health. And such was the unbounded love for their preceptor, their untiring devotion to his pleasure, and the many sacrifices for his interests, that the parting with

them was many times more affecting than the farewell greetings of his present thronging audiences.¹¹

There were two other elements which propelled Morgan into temperance preaching. The first was an early suspicion by him of the relationship between drinking and poverty. He noted that persons in Fairfield County, "All were farmers and on a common level and that at community events there were "large suppers and plenty to drink."¹² He noted that the more successful farmers were those who drank very little or nothing at all of alcoholic beverages.

The second and perhaps deeper personal philosophy statement appears under Morgan's hand in two works published in 1860 and repeated in 1874: "...he felt that 'men are but children of a larger growth and moved by the same passions.'" ¹³

Thus emboldened, Morgan determined to become a preacher and begin study for the ministry with a Colonel Perry who was a minister and an officer retired from West Point. While Henry was sufficiently trained at this point to obtain an Exhorter's License, he became very disenchanted with parochial pastoral work as he felt that one could "take a salary, be called a minister, go indifferently into his pulpit fresh from the last novel, and recite his piece, and retire for the week and say his work was done."¹⁴

While his teaching was a great success, Morgan's initial attempts at preaching

"...were complete failures. He had borrowed the language of the learned; then endeavoring to deliver it with his hot, fiery temperament, he made himself simply ridiculous.... A few failures convinced him of the necessity of a language of his own, and a knowledge of men and nature rather than books, He resolved to travel;...to frequent the almshouses, prisons and hospitals of his own country, and there, with an ear turned to the voice of their wailings, take a lesson of sorrow, and learn the language of grief. He had two objectives in this; one was his own improvement in obtaining statistics, and lecturing, and the other to administer spiritual comfort to the afflicted."¹⁵

Henry Morgan at this point appears to have created the first strategic plan for himself and for the organization which is to bear his name. His assessments of his personal strengths and weaknesses appears to be very adequate and accurate. His simple action plan, as we shall see shortly, clearly takes advantage of the opportunities presented in his role as itinerant preacher to the poor.

After a letter to his mother in November 1894 in which he notes continuing failure to attract and hold an audience with his preaching, he writes in June 1850 to his mother:

"Last Sunday I was at Schenectady, N.Y., and was invited to make my home at the house of President Nott, of Union College. He was exceeding kind to me, gave me advice like a father, and also several valuable presents. Oh, how feelingly that venerable old man prayed for me! too old to kneel, yet, with his hands over me in prayer. I felt like the sons of Jacob receiving their Blessing. He sent me in his carriage to the almshouse, and would have gone with me, but for preaching in his own church at that hour. At six o'clock, by his direction, I had assembled for me, in the Methodist church, the largest audience that I thus far have ever addressed. President, professors, students and ministers, all hung spellbound upon my lips; and when I contrasted the education of these students with the subjects of my mission, the drunkard's

children, schooled in vice and trained for prison, when I presented the firmness and power of an educated will to resist temptation, a mind exercised to denial and disciplined in danger, fed on the intellectual rather than the sensual and gross gratifications of the flesh, and the strength of a character rooted and grounded in decision, in contrast to the imbecile, vacillating, lustful, soul-destroying habits of the sons of neglect, I found response in many a countenance that told me my words were not in vain. I had not felt the full importance of my mission until I contrasted the sons of crime and graduates of vice with those students. I so entered into the spirit of their cause, that I seemed the embodiment of forsaken and forlorn orphanage, or of children worse than orphans. I seemed from the low places of untold misery, and the low back underworld of woe, to rise before them, with the tattered garments and supplicating voices of their own distress. In imagination I seized the young innocent, wiped the filth from its lovely face, combed its silken locks, and dressed it in beauty; and then, presenting it to the audience, inquires wherein it differed from the sons of fortune and fame? The address was listened to with marked attention, and many friendly greetings were ministered to me." ¹⁶

Thus with a modicum of success as a preacher, Henry Morgan began the journey to Boston by way of New York, Virginia, Vermont, and Canada. At one point, shortly after his recovery from tuberculosis in 1856, he was able to establish a congregation in Long Hill, Connecticut, built a church of his own called "Morgan's Chapel" and paid for it with his own funds. He applied to the New England Conference of Methodists for the sixth time seeking ordination and a preachers' license, but was denied. He was, however, licensed by his own church and by an "Independent Conference of Methodists." Shortly after establishing his church very successfully, he again ran into difficulty with the Methodist

Episcopal Church who ultimately ended up with the Conference owning Morgan's Chapel, and Henry Morgan leaving Long Hill for Boston. At his departure from Long Hill, Morgan said,

"...so I hope it may ever be that no person by me shall lose anything in reputation or spiritual interest, and may never be brought into a smaller place, but into a larger one. My object is to do good and not evil; and if I can bring out the talent of one young man to the world, whereby the world may be benefitted, I shall be thankful.... God helping me, I intend to pursue the same course with renewed energy when I arrive in Boston."¹⁷

Once again we see the beginnings of planning for human services in this social service organization. The telling statement, "...if I can bring out the talent of one young man to the world, whereby the world may be benefitted....", points to his determination which led to the founding of the Boston Union Mission Society, which is not only the philosophical precursor of Morgan Memorial Goodwill Industries, but also provided for its first physical structure. To paraphrase Moore: Here there is a plan, not clear and well defined, but the beginnings of a philosophically driven plan.

Upon his arrival in Boston in the winter of 1859, Henry Morgan rented the Music Hall for one year to "...present the Gospel to the working classes and to the poor."¹⁸

While he had only three weeks rental in his possession, he trusted in the generosity of Bostonians. This was based upon his recollection of some seven years prior when he had lectured at Tremont Temple and "had the expenses refunded to me."

E.C.E. Dorion ascribes an additional purpose to Morgan's agenda by inserting "...and to open a mission for the poor in some part of the city...." as part of Morgan's February 27, 1859 opening sermon.¹⁹ This passage does not appear in Morgan's text published in 1860, however the balance of Dorion's quotation appears to be accurate. It may then be assumed that Morgan's intent was to include a mission among the poor, because of his personal and professional experiences in the prisons and almshouses, and from his intent expressed in his address at Long Hill.

Regardless of the expressed intent of Morgan, the sense of mission previously referred to very quickly took physical form in the founding of the Boston Union Mission Society in May of 1859, within three months of Morgan's arrival in the city.

The society was founded to carry the gospel to the poor, clothing children for Sabbath School, educating boys of the street, and employment of the needy.²⁰

The work of the society was begun in the Franklin School which was loaned to Morgan by the City of Boston, at the request of a local businessman, Moses Merrill. The society consisted of a church, sabbath school, night school, benevolent sewing circle, industrial agency for working women, and employment office.²¹

The development of human services of Morgan Memorial then can actually be traced to May 1859, and interesting to note

appears to be the work of actually two persons: Morgan as the public figure, and Merrill as the background person. As we shall see shortly, this pattern repeats itself as we discuss William Sheldon's theory in relation to Edgar J. Helms and Frederick C. Moore.

A major factor which contributed substantially to public awareness and public support of Morgan's mission from its inception was the public expositions he would put on, bringing a Julia Ward Howe to his platform to be followed by a newsboy or a coal picker. The lessons learned from President Nott of Union College in the study of contrasts in his preaching were now being applied in his expositions. This created perhaps the first successful public relations program in the history of the organization. As we shall see later, Edgar Helms' early experience also assisted him to recognize this need for public support.

The Boston Union Mission Society flourished from its inception until 1867, when the City of Boston, so pleased with Morgan's work, determined to reclaim the Franklin School and its programs at an annual cost to the City of \$20,000. Morgan had recruited twenty volunteers to serve the three to four hundred who came daily for evening school classes and related services.

Morgan was devastated by the loss of the Franklin School. He had become the friend of then Governor Claflin, who

appointed Morgan chaplain to the Massachusetts State Senate. In 1868, Governor Claflin informed Henry Morgan that James Freeman Clarke's church on Indiana Place was to be sold at auction and that he would back Henry to a high bid of \$22,000. Morgan suspected that all was not well with the bidding because when he stopped bidding, competing bidders did also. He made a final offer of \$20,400 for the church on Indiana Place to be paid in accordance with his terms and conditions. His offer was accepted and Morgan's Chapel, later to become Morgan Memorial took root in its first physical facility, some nine years after the founding of the Boston Union Mission Society.

The work of the Society was reinitiated, but without the daily oversight of its dynamic leader, Henry Morgan. He had become heavily engaged in writing and lecturing. It is said that his lecture, "Fast Young Men" paid for Morgan Chapel. It was during this period that in addition to publishing "Music Hall Discourses" (1860), he published "Ned Nevins, Newsboy" (1867), "Shadowy Hand" (1874), and "Boston Inside Out" (1880). All of his books were very successful, going into multiple printings. While they are extended morality plays, a scholar of Henry Morgan's life will find much material which portrays Morgan's biases, bigotries, and autobiographical glimpses. His writing offers an excellent portrayal of the life of Boston's poverty stricken persons in the later nineteenth century.

On March 23, 1884, Henry Morgan passed away after a very lengthy illness. He is buried in Mt. Auburn Cemetery in Cambridge, Massachusetts. Governor Claflin ordered his tombstone inscribed with the following: Henry Morgan, P.M.P. (poor man's preacher)

An earnest preacher and a beloved pastor of the poor.²²

In death, Morgan was as unusual as he had been all of his life. His estate included the church and two adjacent houses which he bequeathed to the Benevolent Fraternity of Churches, a Unitarian Organization with the condition that there be an ordained Methodist minister from the New England Conference in the pulpit.

According to Dorion,

"The Unitarians were to furnish the business sagacity and the Methodists the religious zeal for perpetuating the work begun by Mr. Morgan. Should either party fail to perform its trust, the property was to revert to the Boston Young Men's Christian Association."²³

Henry Morgan's life spanned one of the most socially tumultuous times in the brief history of the United States. Territorial expansion coast-to-coast, movement of the frontier to the Pacific, the Civil War and the Industrial Revolution. Morgan's motivations to work among the poor are reasonably clear from his beginnings, and are made clearer still from his writings, particularly in "Ned Nevins, Newsboy", and in "Boston Inside Out: Sins of a Great City". In both works the protagonists are poor persons whose daily life struggles are closely chronicled. In many respects they are an account of

the misery caused by the abuse of power and position by the upper class. His writing portrays the struggles of principled poor persons who resist the enticements of the rich because of a higher sense of right/good. Perhaps the best characterization can be found in Ned Nevins who says, "If I do nuthin' wrong, somethin' good'l come to me."²⁴

From 1884 to 1895 there was a succession of five pastors at Morgan's Chapel: Rev. C.L. Gould, Rev. N.W. Jordan, Rev. B.F. Johnston, Rev. E.P. King, Rev. I.B. Schreckgast. The chapel, its services and mission, had fallen into disuse and disrepair until the arrival of a newly ordained Methodist minister, Rev. Edgar James Helms.

The meager congregation that greeted Edgar Helms was the result of a practice instituted by Rev. E.P. King who refused to preach to empty pews and introduced the custom of feeding people in order to get them to attend services of worship. He invited the men in from the streets for a breakfast and, after eating, the men were compelled to go upstairs for a preaching service.²⁵

According to Henry Helms, his father has stated that the doors of the chapel were physically locked so that there was no escape from the preaching service. This practice was continued by Rev. I.B. Schreckgast until April 7, 1895 when Edgar Helms was appointed to Morgan Chapel. His acceptance of appointment was conditional, based on condition that he be permitted to study the needs of the community in which the chapel was located and to attempt to develop an institutional program which would in some measure meet these needs.²⁶

It is apparent that planning was a significant component of Helms' life, even as a young minister, embarking on his first assignment.

Edgar James Helms (1863-1942)

Edgar James Helms was born January 19, 1863 in Malone, New York at a lumber camp to Leorna and William Helms. His father was a logger, and his mother the camp cook. Just prior to his birth, as Edgar learned much later in his life, his mother had fallen on a stone slab at the cook house door and

" ...fell on my back with such force that I could not move. My first thought was, " My baby can never be born! While lying there in that helpless condition, I earnestly prayed to God and made this vow: 'If God will spare my life and my child is a son, I will dedicate him to the service of God.'"²⁷

While Edgar's mother had her own agenda concerning Edgar's life's work, to her credit there is no evidence of direct action on her part to unduly influence his choices.

Shortly after Edgar was born, the William Helms family moved west to join the James Helms family in Iowa. Edgar's father acquired a farmstead in Nashua Iowa where the family eventually prospered. Edgar's early education was at the hand of his mother who was a women's seminary graduate.

His early life was typically that of a frontier farm boy. The lack of institutions of church and education were more

than adequately supplanted by his parents. Except for the itinerant preacher in his early years, Edgar's religious education was homespun: prayer, bible readings and hymns in the family home until there was a preacher some years after the Helms' arrival.

He learned much of leadership and quiet strength from his father. Evidence of this appears in anecdotes, whose lessons have survived at least two generations of Helms'.

The first of these is the "Grasshopper Story". In 1873, historians note a grasshopper plague that devastated many farms in the Spirit Lake region of Iowa. While the Helms family was stunned by the onslaught of the predators, as were most in the region, William, determined that he would not be driven from his homestead sprang into action. He constructed what appeared to be a sailboat and instructed Leorna and his daughter to begin boiling water, plenty of boiling water. With little Edgar at his side he set off with the "sailboat" across his fields to the edge of the lake. Edgar asked his father why he wanted to go fishing at that particular time. His father told him to watch and be prepared to help. As they approached the lake shore, hundreds and hundreds of grasshoppers hit the sail and fell into the boat-like trough. When the trough was full, William returned to his home to put the stunned grasshoppers into boiling water. There is no information to indicate for how long this went on, but the Helms family was able to feed all of their turkeys and pigs

for the next year on this harvest, have sufficient to feed their family and to buy seed for the next year's crop from the sale of their livestock.

The second of these anecdotes is the "Fishing Story". It is a story contemporary and subsequent to the first. Shortly before the time of the plague, a church was established in Spirit Lake, and a pastor, Rev. William Preston, his wife, and his family, including a daughter, Jean, were totally dependent for their existence on this community. After the grasshopper disaster, William Helms, who was church steward, knew that there would not be funds to support the pastor for the winter. Beatrice Plumb characterizes the situation of Pastor Preston coming to William to beg for funds to care for his ill wife, and to buy clothing so that his children could attend school. As the story goes, William went to all of the men who regularly spear fished through the ice on Spirit Lake to donate their entire catch on the following Monday to benefit Rev. Preston. He next persuaded Mr. A.M. Johnson, a local merchant to purchase the entire catch from that day. Both the fishermen and the merchant were agreeable because a day's catch had been very small in recent days. As the story concludes, there was a shift of the wind into the south, and the catch on that Monday was the greatest that anyone could remember. The merchant grudgingly bought the catch, the Pastor and his family were able to meet their needs, and on

the two subsequent days, there were also outstanding catches.

Both of these anecdotes, and perhaps numerous others not related here, shaped the life and thought of Edgar.

In the first, he learned of resourcefulness, and saw his father's inspiration as God-given. In the second, he saw demonstrated again the intervention of his Creator in a manner which he could easily relate to his early training in the Scriptures.

Perhaps of greater import to the development of Morgan Memorial Goodwill Industries was Edgar's belief that the resources were always at hand to effect solutions to current problems if one were in tune with his Creator. This is evidenced as late in his life as 1942 when in his farewell address to "Goodwillers" he stated in part, "...but please remember this: No matter what problems you face. always remember there can be no failure when you are working for the Kingdom of God."²⁸

This almost blind faith, and demonstrated resourcefulness were clearly tied to his childhood education which combined the spiritual with daily living experiences. In some respects, it contributed to some substantial, nearly organization-destroying problems because he was not truly a planner as we conceive of them today.

Fisher quoting Sheldon writes of this

"...there is a Promethean element and an epimethean element which are in conflict in the personality of

the religious man. The Promethean element of consciousness is the forward straining dream of a better world.... This element when dominant, gives rise to radical idealism. The Epimethean element in contrast is the wish for safety and for the security of righteousness. It is the backward straining element or conservative idealism. Sheldon identifies Prometheus with the prophet and epimetheus with the priest, both religious men.²⁹

As we shall see in practice, Edgar Helms demonstrated the Promethean element, committing to visions of a better world, frequently with no thought given to the resources needed to actualize that vision. We shall see that he was not truly a planner. Early on in the development of Morgan Memorial Goodwill Industries, Edgar had the insight to employ the services of a "New Foundlander" named Frederick C. Moore. It was Mr. Moore who, while equally zealous of the religious life of the institution, provided the planful approaches to Edgar's visions. It was Moore who provided the Epimethean balance to Edgar James Helms.

The purpose of this apparent digression from the chronology of Edgar Helms life is to create a foundation to examine critical decisions and their outcomes from Helms early life experiences which are determinants in his view of planning as a process and practice.

By age fifteen, young Edgar had begun to examine his vocational options. He stated in his autobiographical work, Pioneering in Modern City Missions, "I want to be a famous man." According to the work, he had an opportunity to enter a

partnership in farming with his father, he considered law, for some period he considered the ministry, but his initial choice was that of an apprentice printer.

While in school he had been asked to present a "piece" before an assembly. In the audience was the editor of the county paper, the Spirit Lake Beacon. Mr. Smith, a printer, had heard Edgar speak, and was so impressed that he drove to the Helms' farm to offer Edgar an apprenticeship. The offer was considered by the whole family, with both father and mother attempting to dissuade the young Helms from accepting. Accept it he did and more. As he says,

"I left home determined that I would either succeed or die in the effort. I spent nearly three years in that office in almost continuous pain, for I ceased to grow when I left the open air. I never earned the money I could have obtained if I had gone into partnership with father on his generous terms. I learned the trade rapidly, however, and by means of it, later earned most of my expenses through college. I read and studied almost every night. At First I read law books loaned to me by John W. Cory, a lawyer who had the good sense to tell me that a boy of fifteen had better study school books and read literature and history. Seeing I was persistent, he gave me some of the driest and most uninteresting stuff he had. Later, I found he had never read those reference books himself and was trying to discourage me. After a few musty volumes, I switched to history and literature and revelled in the same."³⁰

Here again we see no evidence of planning in his career choice, but we can see the workings of chance happening. Helms readings were excellent preparation for his ministry. It is;

however, his intimacy with the press and its power to communicate widely that will serve his cause well in later life. It is this means that will allow him to spread the word of Goodwill to the people. Again, chance not plan.

At age seventeen Edgar was recruited by Professor S.N. Williams to attend Cornell College in Iowa. He determined to attend because the educational offerings in the Spirit Lake area were like, "threshing over old straw." Edgar had saved only sufficient funds to get him to the college. His father suggested that he work an additional year so that he could save the needed funds. His mother, however, saw in him the seeds of rebellious youth, questioning what he believed to be inconsistencies in certain prevailing church ethics.

"One might cheat in horse trades and dodge honest debt and neglect his family, and all this was winked at by church authorities; but handle cards or dance, and you were anathema."³¹

She believed it was time to get him a good Christian education. His father had saved one hundred dollars with which to build a new granary. After a family conference on Edgar's educational plans, his father agreed to give him the funds.

Since the nearest railroad was more than fifty miles away, there was a need to transport Edgar to it. The local preacher, then Rev. P.H. Eighmy, was to be driving overland to his annual conference at Fort Dodge, and could take Edgar to the train.

On this trip, there was a stop for a camp meeting at Hans' Grove near Livermore, Iowa. After travelling many miles, and engaging Rev. Eighmy in conversation about religion, Edgar felt,

"I was having the better of the argument with this positive but kind and good natured pioneer preacher; but he would always 'find cover' by saying that a religious experience of conversion was the only answer to my doubts.... I made up my mind to test out some of these things by seeking a religious experience of conversion at that camp meeting if I could obtain it.

But Hans' Grove was the dullest camp-meeting I ever attended.... The testimony of a spare, old white haired preacher was the only thing that really interested me. He continually asserted that he had the witness from God that the Lord was going to do wonders in that camp-meeting. 'Someone,' he declared, 'was going to be converted who would lead thousands to Christ.' A conviction gripped me that the person referred to was myself.

...So dull was the meeting I was afraid he would not give the invitation. The hired man at my side was full of ridicule. How surprised he was to see me rise and go forward when the invitation was given. Indeed the whole audience was surprised. Several saints gathered around me in the straw and tried to instruct me. They finally asked me to testify. I got up and truthfully said, 'I never felt so mean in all my life as now, but I feel I ought to give Christianity a fair test, and I intend to do so.'

It was a cold wet night, and I was chilled when I reached the farm house where I lodged. They had lighted a fire and were having evening prayers, before retiring. When our presiding elder, Rev. H.W. Brown was praying, I felt a wonderful, comforting feeling within me. I first thought, 'It is the warmth from the stove.' Then I realized that it was not the fire, and I asked myself, 'Am I getting religion?' I arose and walked out into the grove and knelt down by a big tree to pray. I said, 'Lord I want to be sure of my conversion If this be a religious experience of conversion, make it so that I will never doubt it.'

In a moment my comfort was gone and despair filled my soul. I rose, went back to the house and went to bed. Before I fell asleep I promised God I

would seek Him till I found Him, and I asked Him to forgive me for doubting. I awoke the next morning just as the rising sun was streaming into my window. That morning there was another light than sunlight in that room. It radiated ineffable peace in my soul. I had been converted while I slept. I never knew anyone else to be converted while asleep.'³²

The next day Bro. Eighmy drove Edgar to the railroad station without religious debate. Eighmy had entered Edgar's name on the church record as a member on probation, and informed him that at the next quarterly conference he would be granted an Exhorter's License. At the station Eighmy purchased Edgar's ticket because the young man was still "green" in these matters. Edgar departed for Mount Vernon and Cornell College.

Because he was a young man of very limited means, he joined the "cheapest eating club in town", which choice was to cost him dearly in his education. Edgar was forced to withdraw from Cornell College after his first year due to malnutrition-induced illness. Upon his return home and restoration to good health through his mother's cooking, Edgar returned to the Spirit Lake Beacon where he was made foreman of the shop. In this new position he was earning sufficiently so that after six months of work and saving, he was able to join with a coworker, Edward Blackert, in establishing a new newspaper in Peterson, a new community some forty miles away. The story about this venture is highly illustrative of Helms lack of planning, and a testament to his resourcefulness which carried the day again for him.

"As he worked he dreamed of one day having a newspaper of his own; not just printing it, but editing, publishing and owning it. In less than six months the opportunity came to start one at the settlement of Peterson, about forty miles southwest of Spirit Lake. True, it could only be reached by following Indian trails or crossing the trackless prairie, but for teenage Ed, used to frontier conditions, this was of small account.

A fellow worker on the 'Beacon,' Edward Blackert, had a little spare cash to invest and decided to go in with Ed as a partner.

The nearest railway station to the Peterson settlement was at Cherokee, Iowa, to which the young printers sent their second hand press and other necessary shop equipment. But from there the heavy load must travel by oxen-drawn wagons over prairies that were then absolute bogs of deep, slushy mud due to the spring rains, and then through the dangerously swollen Little River crossing.

This prospect did not daunt them; they could take their time. But the news they heard at the depot certainly did! For they were told that theirs was not the only press Peterson-bound. Another printer who lived at Storm Lake, about twenty-five miles from Peterson in another direction, had been seized by the same desire to start a newspaper there and was already on his way to do so!

Ed and his partner could no longer take their time. Now it became a frantic race to see which printer could reach Peterson first, set up shop, and get out the first edition of his newspaper before the other could. The distance to be covered by the competing publishers was practically the same.

Through the mud, gruelling mile after mile, Ed Helms and his office force partner plunged, the oxen struggling and straining, with their drivers urging them on. At last they reached the spot they dreaded - the swollen river they must cross.

'It is impossible to ford,' decided Edward Blackert. 'We'll never make it!'

'We must caulk the wagons to make them waterproof,' said Ed briskly, as many an early settler, trekking to the frontier with his family, had said before him. 'Let's get to unloading!'

Then came the backbreaking job of heaving the heavy load off the wagons and down to the river bank; the caulking of the wagons against the flooded river, and the Herculean effort to lift the weighty machines back on again. And all this as they cast

worried glances over the prairie to see if their competition was in sight!

As they drove the oxen into the river crossing, Ed held his breath and said a white-lipped prayer. Could they make it to the other side? If not, all was lost.

They did, although at times it was touch and go. Now they were only ten miles from Peterson's main street - built through a cornfield! Finally they reached it and breathlessly proceeded to rush out the first edition of the Peterson Patriot'³³

Here again we see demonstrated the absence of planning on the part of Helms. It appears that he had acted upon a strong desire - impulse to establish something, and did it. As this anecdote illustrates, quite successfully as a result of Edgar's Promethean determination and his ability to assess a situation quickly and take corrective or remedial action. It is this willingness to risk all for the greater good that is very evident in all of Helms' life. It is this same trait that nearly lost it all for his institution. Here again his early training by both his father, in resourcefulness and practical knowledge, and his mother, in a deep faith in the Providence of their God; Edgar clearly demonstrated the combination of both of these facets throughout his life.

At eighteen years of age Edgar became a very successful newspaper publisher; so successful that he purchased another paper, The Sioux Press about ten miles from Peterson. While the management and operation of two newspapers would seem sufficient to occupy one fully, Edgar was able to return to Cornell College and complete three more terms by maintaining a strenuous travel schedule that combined the pursuit of

learning with the pursuit of subscribers and advertisers for both papers. His papers were drawn into the Temperance struggle against "Demon Rum" and attracted the attention of the state Republican party. He was made chairman of the Clayton County delegation when he was twenty one, and he supported the home town candidate who cast the deciding vote to make Iowa a prohibition state.

As he was beginning his junior year at Cornell, his ambition to become a famous man again surfaced in a new form, perhaps whetted by his successes in the political arena. He is quoted as saying to his mother,

" Mother, if I ever became a congressman or governor, or a president, I will have to be a lawyer. Can't I be good and honest and be a lawyer? Lincoln was. Mother, don't you want me to be a famous man?"³⁴

It is stated by Plumb that this was a time of great trial for Edgar. His desire to be a great man was seriously offset by his deep, but perhaps unrealized religious convictions reinforced since his birth. "Fame! Fortune!" shouted one voice, and it was deep and sonorous, like that of a senator he admires. "A minister of the gospel," whispered another soft as a woman praying.³⁵

Initially it was the call of politics that prevailed . First he lost the nomination to a Senate seat within the Republican party. Encouraged by his strong Prohibitionist friends, he ran as an Independent. His defeat at the polls was as devastating as it was decisive. This was the first

major venture upon which the young Helms had embarked that had not met with success. After a short time of licking his wounds, he decided to sell his newspapers, and with the proceeds to finish his last year at Cornell College and enter Boston University School of Theology. After announcing his decision to his family, he consulted with Rev. Preston, informing him of his intent to become a missionary in India. At the same time he announced that while training in Boston, he would expect the minister's daughter, Jean, to join him after his first year of theological school so that she might enter the Deaconess Training School in preparation for their life together as husband and wife missionaries. Rev. Preston's dissuasions were of no effect on this newly invigorated Edgar. The papers, which had excellent circulations and were debt free, sold immediately. Edgar completed Cornell College, earning the degree of Bachelor of Philosophy. The next term he enrolled at Boston University's School of Theology.

During his final year at Cornell, Edgar had the opportunity to exercise his Exhorter's License, by establishing what was to be known as the Mount Vernon Circuit in which he and his fellow students preached temperance on a regular basis. During his final summer before theological school, his fiance, Jean Preston, joined him in his circuit rider work, conducting what was described as a "most gracious revival" in the notorious town of Solon.

The Boston that greeted Helms was different from that which greeted Morgan a scant thirty five years earlier. The "closing" of our frontiers because of coast to coast expansion, rail lines crisscrossing every corner of the country, and a flood of immigration created pressures within the United States. Between 1880 and 1890 the population had increased by fifty percent growing from fifty million to seventy-five million in just ten years. Compounding the problems of explosive growth, was the fact that most immigrants who arrived prior to 1880 were northern European in origin and relatively easily assimilated into the population and culture. After 1880, a preponderance of those immigrating came from Mediterranean and Middle Eastern countries. They tended to settle in enclaves, retaining language and customs, and found assimilation to be difficult.

While much of the thought during Morgan's time was of territorial and industrial expansion, Manifest Destiny, the thought in Boston had changed dramatically, influenced by the work of Engels, Marx, and New England's own Edward Bellamy.

Of this situation Lewis writes,

" Furthermore, the Marxist-Socialist 'pied pipers' had implanted their message in England and Germany from whence it spread in epidemic magnitude to Eastern Europe and Russia, but not to the Catholic-dominated Mediterranean world before World War I. Nonetheless, Boston was shuddering under the impact of the immigrant invasion and, trying without notable success to adjust to the impact, it made no distinction between the southern European or northern European or Chinese. All were immigrants and all were to be abhorred. As the older sections of the city yielded to the overpowering demands for

housing from the poor, generally illiterate, confused, frightened, and often abused new arrivals, the middle to upper economic classes moved out to new relatively isolated developments in Back Bay, Cambridge, even as far west as Wellesley, north to Salem, south to Quincy. Once respectable townhouses became boardinghouses, brothels, gambling dens and tenements served by a disproportionate high number of taverns and similar centers of seamy low-life.³⁶

This was the scene in Boston that greeted the first year student of the Boston University Theological School. Despite his being a first year student, Helms was given a pastoral assignment to the church at West Abington. In addition to his studies he began relief mission, settlement, work in the North End of Boston among the Italian immigrants. Like a number of persons at that time, he was outraged by the abuse and exploitation of these newly arrived Americans in the North End. His fiancee, Jean Preston, began her work in the South End of the city, interestingly at Morgan's Chapel where she began a woman's industrial training program, teaching young women to sew. Helms' schedule was very full that first year between his studies, pastorate, and settlement work. He was not too busy to remember his first love, that of becoming a missionary to India. To this end, and through his friend and classmate, Lyle Thorburn, he was introduced to Bishop James M. Thorburn, who was instrumental and influential in missionary assignments for the Methodist church. Within a short time Lyle had convinced his uncle that he and Helms would make an excellent pair for service in India. Helms was delighted. Jean Preston was able to enter the Deaconess Training Program

because William Helms had sold the family farm to move to Oregon, and sent Edgar two hundred dollars which he used for her tuition.

In 1892 after a very busy first year in Boston, Helms and his colleagues were able to convince the church to reopen the City Missionary Society, and fund the project with \$1200. Helms, Rollin H. Walker, and Wilson S. Naylor, all Boston University theological students, were each to be paid \$400 per year. They were to be accompanied in their work by Jean Preston, Edgar's fiancee of ten years, Walker's wife, and Naylor's sister. None of the women were to be paid. In the summer of 1892, Edgar and Jean returned to Sioux City, Iowa and were married by her father. Walker went to England that summer for ecclesiastical study, Naylor remained in Boston to study immigrant communities, and the Helms family remained in Iowa to study ways to "Americanize and Christianize" the immigrants.

In the fall of 1892, the party reassembled, and began their rescue mission work out of rented quarters originally called the Boston University Settlement. The budget accepted by the Society did not provide for the rental, so the young city missionaries had to raise the funds for that themselves. Helms' characteristic sense of humor is seen here as he describes the fiscal situation of the Settlement,

" To this day the humor of that situation has not dawned on those laymen or missionaries. It was wild financing. But we believed, and God took care of us. Friends from unexpected sources came in and

left contributions. Every month our bills were paid. Prof. Walker saw the humor of it one day when he and the writer were called before an official of Boston University, who, after speaking appreciatively of our work, requested us to drop the name 'Boston University Settlement' for fear that some funds might go to us instead of to the University. If the official had only known how little we were receiving! Walker would occasionally put in his whole salary to help square the rent. One month we were saved by a collection Naylor got at an Epworth League rally, another month a wedding fee I received just squared the rent. On another occasion, I got a fee as inspector of elections which just made the amount necessary. Those fees seemed to us just as providential as that miraculous haul of fish recorded in Chapter I. Some of the Boston laymen like O.R. Durrell, R.S. Douglass, E.O. Fisk, R.R. Robinson, and George E. Atwood were heroic givers. But the settlement salaries never caused the Society very heavy deficits. Their growing work did entail expenses. However, the workers paid their tithes, and more, and fulfilled the apostolic injunction of being 'hilarious givers' both of themselves and of their stipends."³⁷

While Helms and his young group of missionaries appear to be extremely dedicated to their work, and to "trust in Providence", the work of the Boston University Settlement appears at this point to be very lacking in planning perhaps for the same reason that this missionary work was nearly extinct before Helms' arrival. It is apparent that service to the North End community was being delivered, but planfulness does not appear as a major concern.

In their design to Americanize and Christianize the residents of the North End, Helms observed that most were being economically exploited by "padrones and banks" who charged exorbitant, usurious rates of interest to the unsuspecting immigrants, and swindled them out of their savings. With the

assistance of a lawyer that he hired, Helms was able to have large sums returned to the people swindled. To inform the neighborhood, he established his own newspaper, "L'Amico del Popolo", the friend of the people, and with his seeming innate sense of public relations, organized a rally at Faneuil Hall with leaders like Edward Everett Hale, Julia Ward Howe, and Edwin D. Mead speaking out against the abuse of the Italian and Portugese communities. Matters had begun to fall into place so well for the settlement, that Edgar began to create plans for a Church of All Nations in the North End, and was actively looking for a site to build when the Methodist minister, Senor Gaetano Conti, whom he had brought from Italy balked at the concept. He demanded a separate Italian Church. The controversy went to the Mission Society board for resolution, and because of the success of the Italian Mission's work decided against Helms.

"More Italians were converted [in Boston] within six months than were in the entire Methodist Church in Italy during that year 1892-1893. The work in Italy that period employed 31 preachers requiring an expenditure of \$451,000. The Boston work in the North End cost only \$1,000."³⁸

Helms records in his autobiographical material that shortly after the decision to go ahead with the Italian church was implemented, Senor Conti abandoned his work in the North End and the Italian church withered, another instance when careful analysis, planning and presentation could have prevailed to the benefit of Helms' intent.

Helms writes of the end of his work in the North End,

" I had conceived a church of all nations for the North End, but my plan was frustrated. Twenty five years later these peoples had moved to the South End of Boston around Morgan's Chapel. Soon after the disruption of the North End work I went to Morgan's Chapel. There we have done what I believe God wanted in the North End Thirty five years ago.

Before I left the North End, I brought Prof. Harriet J. Cooke, my former teacher of history at Cornell College, from Mildmay, England to establish the medical mission at the settlement. We interested the Women's Home Missionary Society in the undertaking and in due time these ladies took over the work of the settlement and built their fine plant there and have met with marked success. I went to the South End with an aching heart."³⁹

Summary

In this first chapter we have observed two men instrumental in the formation of Morgan Memorial Goodwill Industries. In Henry Morgan we see a man who was obviously a gifted writer and preacher. He was a man was not overly effected by the post Edwards period of transcendentalism, but rather one who adhered to the long Methodist tradition of preaching with "the fire in his belly."The lessons he learned at the hand of President Noll were retained and used throughout his life to establish him as a preacher. However, he did not learn the value of planning for his various organizations as they were lost during his lifetime, the church at Long Hill and the Boston Union Mission Society.

Perhaps the only real evidence of planning appears in Morgan's will concerning disposition of Morgan's Chapel, and that has been a most successful outcome.

Edgar James Helms was also not a planner as we observe, but rather one moved by impulse, perhaps described as "the will of God", and virtual blind trust in Providence. We have illustrated how he was developed in an atmosphere of resourcefulness as a frontier youth, and raised in a deep faith in his God. While in hindsight, Helms states that his concept of a Church of All Nations was a plan, there is no evidence to support that it was more than a concept when he opposed Senor Conti and lost. Had he been a better planner at this juncture, Morgan Memorial might exist today as a North End community agency of the City Missionary Society of Boston. It is evident that something other than the Promethean will of Edgar James Helms was functioning here.

ENDNOTES CHAPTER I

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II PHILOSOPHICAL FOUNDATIONS

In this chapter we will explore the social, philosophical, economic and theological foundations of Morgan Memorial Goodwill Industries, Inc. We shall see the earliest evolution of human services in the organization. As previously stated, planning as an aspect or determinant will be viewed in light of anticipated outcomes. The years 1895 to 1905 are most crucial in the development of Morgan Memorial, because it is during this time period that much of the operational social philosophy of Edgar J. Helms was developed upon the infrastructure of his earlier acquired value system. Again a significant reason for the apparent digressions in Chapter I.

The development of charitable work at this point had a substantial history in law and religion, providing Edgar, the community, and the government with hundreds of years of experience upon which to draw. Huddleston devotes sixty two pages to creating a synopsis of the development of social service/ charitable work from prechristian times to his current period. Selected events, Acts and developments will be presented here because they are indicative of the climate within which Helms was to operate.

Before either the Christian or Hebrew faith were organized and practiced, the ancient Chinese created

institutions for relief, including care for the aged and poor, schools for poor children, free eating houses for laborers, bureaus for paying expenses associated with marriage or burial, and even an association for distributing second hand clothes. The religious basis for support of these activities lies in the concept of earning merit toward comfort in this life and the next. Meanspiritedness or hard heartedness was very negatively viewed, resulting in punishment now and in the hereafter.

Throughout time in the Jewish culture, charity has been motivated by a feeling of pity for less fortunate persons, the widow, the orphan. The basis for this thought is found in the simplistic love for God; love expressed in service or support for one's fellow man.

The early Christian tradition was founded upon the brotherhood of man, taking literally the new scriptural directive to act as brothers and sisters in one family, one faith. As the Roman church developed, the face to face acts of charity diminished as the institution of the church through its bishops, priests, deacons and monks became the agents of charity. As this church became more powerful in governments, especially in Europe, charity began to be subsumed by governmental bodies.¹

Huddleston, synopsising Harnack, states ten services offered by the Third century church:

First, alms in general, and their connection with the cultus and officials of the church. Second, is

the support of teachers and officials. Third, meant to alleviate the needs of widows and orphans. Fourth, the support of the sick, infirm and the disabled. Fifth, the care of prisoners and people languishing in the mines. Sixth the care of poor people needing burial and of the dead in general. Seventh, the care of slaves. Eighth, the care of those suffering personal or family tragedy. Ninth, the churches furnishing work, and insisting that each member work if able. Tenth, the responsibility of a Christian to provide hospitality to other Christians travelling through his town. Also helping other Christian churches in times of peril.²

By the year 800 A.D. the first of a series of civil laws prohibiting begging were passed. All able bodied beggars were to be fined. The purpose of this law was to keep able bodied serfs on the manors and to protect travellers from robbery by the wandering beggars. It was also the result of civil concern for mismanagement of funds donated by royalty and nobility to the church for operation of the institutions. Until this time church and state had acted in cooperation in the formalizing of charitable works. Intervention of the state at this point began to bureaucratize the delivery of human services with the establishment of boards of supervision where church officials refused to eliminate vagrancy and mendicancy.

Almsgiving had become in the Roman church, closely akin to the ancient Chinese thought that it was a universal means to salvation. This was greatly supported by the medieval church, and it was one of the major issues which sparked the reformation.

It was perceived by Reformers as "selling indulgences".

The spread of the Reformation throughout northern Europe provided another impetus for governmental involvement in charitable work. The Roman church parish which had become the seat of local government, and the agent of beneficence gradually lost power as each community developed Protestant churches. Perhaps as a reaction to "selling indulgences" the new church preached a theology that faith alone was the route to eternal salvation.

At this point congregations of these churches looked to their local government rather than to the church to undertake charitable activities. Huddleston lists five points which resulted in government assuming this role and why the new churches could not. Three of the five are pragmatic financial concerns because the churches were generally populated by members of the peasant class and had limited resources. The remaining two he cites are theological and philosophical battles to be fought and the rising tide of nationalism which required greater state control of matters. In the 1520's both Luther in Germany and Zwingli in Switzerland published treatises on the poor which resulted in acts which would reduce vagrancy and pauperism. Tightly defined relief was proposed along with restrictions on the mobility of beggars. These interventions were supported by both public contribution and specific property tax levies.

While the wave of Reformation swept across northern Europe, southern Europe remained under the domination of the

Roman church. Huddleston states that after the Reformation was well underway, the Roman church turned its back on intellectual achievement and humanism of the Renaissance, modern scientific methods, case work, medical advances and welfare services, using charity rather to retain existing church members and to reach out for new converts.³

Huddleston does note later that in post-Reformation southern Europe, the Roman Catholic church had begun to adopt the stance on philanthropy that had been worked out by both the Jewish and Protestant communities. He cites material evidence of this in the formation of the St. Vincent de Paul Society in 1833.

Anglo-American philanthropy shares common roots and philosophy as one might expect. From 800 A.D. most law was similar to that of Charlemagne, attempting to control negative behaviors of the poor and vagrant. One of the earliest laws in England was passed in 1349, regulating valiant beggars who gave themselves to idleness and vice. Those giving alms to beggars could be fined and imprisoned. Beggars were compelled to labor for their necessary living. In 1531 and 1536 there were additional laws passed requiring each parish to care for its poor, and to distinguish between those who could and could not work. Persons able to work were required to do so. Vagrants, found to be healthy were to be whipped, and sent back to their own parish for further disposition. It was not

uncommon for beggars to be imprisoned, whipped, or even sold at auction for slave labor.

The Act of 1536 did, however, provide for the care of dependent children, as well as provide for their indenture or apprenticeship. This Act also provided each town with an overseer who had the power of taxation to meet the needs of disabled and aged. Much of the philanthropy of this era was very simple to administer since each member of a community was known to every other. The feudal system had assigned each person a place in the community, and the community worked to maintain that place.

However, with the deterioration of the feudal system, and with the growth of cities and towns, by the year 1600 mobility of persons from place to place made the existing system of charity and control ineffective.

The Act of 1601, an Elizabethan Poor Law, was the direct result of the breakdown of the feudal system and a rise of nationalism in England. Rather than a visionary development, England, which was a series of town economies, realized that France, Spain and Portugal were developing strong centralized governments and were competing with England for markets and resources. The remarkability of the Poor Law was its articulation for the first time that the state is fully responsible for the welfare of dependent persons. Its major provisions were:

1. Overseers of the poor were to be appointed annually by the justices in each parish. In

addition to church wardens the overseers were to include from two to four "substantial householders."

2. Able bodied persons who had no means of support were to be set to work.

3. Funds necessary for carrying the act into operation were to be raised by taxing every householder.

4. Power was given to the justices to raise funds from other parishes in the vicinity or even within the same county if insufficient funds were available locally.

5. Overseers were authorized with the consent of two justices to bind out poor children as apprentices. A "woman childe" could be bound to the age of twenty-one or marriage, a "man childe" to the age of twenty-four.

6. Local authorities, with the consent of the Lords of Manors, were empowered to erect workhouses on waste lands. The cost of the building was to be borne by the parish or county.

7. Legal responsibility for maintaining parents, grandparents, and children was continued. The mutual responsibility for parents to support children was extended to grandfathers and grandmothers.

8. Justices were authorized "to commit to the House of Correction or common gaol, such poor person as shall not employ themselves to work, being appointed there to by the overseers."⁴

Since much of American law is drawn from English Common Law this particular act is very significant in that it established the right or duty of government to provide for the needs of persons without means for whatever reason. While today this act would be viewed as harsh, unconstitutional, it is the genesis of this government's efforts to provide for persons in need. It is the basis for public policy creation, debate, and service delivery. It is interesting to note that until very recent times, the precolonial title, Overseer of the Public Welfare, was emblazoned on welfare offices in the city of Boston, viz. the Church Street office.

In addition to governmental influence on the social development of Morgan Memorial, as a Methodist institution, the life and example of the founder of Methodism, John Wesley, must be considered . John Wesley's life spanned nearly a century, 1703 to 1791. Helms acknowledges Wesley's influence in this manner:

"John Wesley was alive to the industrial needs of his people. Attendants at his class meetings were trained to bring a penny a week to help the poor of the parish. He had London districted in his day much as the Associated Charities have our great cities today, in order that his visitors might make careful inquiry and wisely minister to the needs of the destitute. He made wise loans to the poor and found people work. He founded the first free dispensary in history - it is still in existence - the old Finsbury Dispensary in London. He established orphanages at an Old Ladies Home. In the Old Foundry Church he gave temporary work to the poor in times of great industrial depression. John Wesley loved folks; poor, needy folks, and wisely helped them, and therefore, gripped his times. Like his Master, the common people heard him gladly, for he hated slavery and always promoted welfare."⁵

Wesley's life was an excellent example of "good works" to be emulated by his followers. His journal supplies numerous examples. He is known to have given away to the poor all funds not needed for his barest needs; to have collected and distributed clothing among the needy; provided suitable housing for widows; created free schools and day nurseries for poor children; and to make judicious loans to poor persons. As stated in Chapter I, his example and disciplines forged an institutional development of human services within the

Methodist Church, and created the climate for development of an organization such as Morgan Memorial.

The convergence of public policy and the early religious foundation for caring for others as practiced in the Methodist Church are two dominant factors which lead to the development of Morgan Memorial's human services programs today.

To this point the development of charities in England has been examined. The colonists brought with them the general sense of the Elizabethan Poor Law, but because of their Calvinistic beliefs, were prone to use it punitively. Indolence was to be punished.

In the post revolution period, the beginnings of legislation to protect vulnerable persons began to be passed, virtually on a class by class basis. Widows of the Revolution, victims of Indian uprisings, and flood victims to cite examples. Except for the larger cities which had established almshouses as in England, much of philanthropy in the United States was handled by private societies. Churches would take care of their own. The almshouses, as in England, would "farm out" able bodied poor to apprenticeships. Alien poor, persons not of the community in which they were discovered would be imprisoned or confined to the almshouse. There was no attempt at education or rehabilitation within the almshouse, it rather was the warehouse for the itinerant poor, disabled persons, mentally ill or developmentally disabled persons. In short Calvinistic colonists had created bedlam.

It was not until the later half of the nineteenth century that state governments became organized in their treatment of poor persons. Massachusetts was the first to establish its oversight body in 1863, organizing a State Board of Charities.

By 1869, the number of state paupers had been reduced significantly, a classification plan for all institution inmates was established, and order was established in all state charities.

Federal support for programs for persons in need was still to be many years away. Dorothea Lynde Dix, best known for her work to humanize

institutions for mentally ill persons, was the authoress of an act which would have the federal government establish land grants for charitable purposes, much as it had done to support education. The land was to be distributed through the then thirty states according to the ratio of the states population. Her bill was passed by the Congress in March of 1854.

President Pierce vetoed it stating that the federal government is a delegated power. That relief of the needy and the powers needed to implement their assistance were within the purview of state government, and not to be subsumed by the federal government. He stated that the general welfare provisions cited in the constitution could not be interpreted in such a way as to involve the federal government in a general welfare program. President Pierce's position was upheld for many years.

In Boston, in 1823, Mayor Josiah Quincy ordered the construction of a "House of Industry" for the paupers of the city who numbered into the several thousands. It was constructed in South Boston and managed by the city. In 1830 Uxbridge followed Boston's lead. Next came Worcester in 1835. By 1860, 52 of the 58 towns in Massachusetts had them. Each was established with an economic base of industry. Farming, lumbering and quarrying were among the industries used to generate revenue to offset the cost of care of the paupers.

Revenues generated by the enterprises never fully offset expenditures for inmates of the almshouses. ...a pauper cost the town from \$1.06 to \$2.47 weekly. Comparing what was grown with what was sold, researchers estimate that residents consumed an average of 3,693 calories a day, which Elia says is on the high end of what a healthy young man needs to sustain light work- but is nothing to get fat on.

It was found in a recent archeological dig at the site of the Uxbridge Almshouse from remains exhumed from its cemetery

that persons living there appeared to be treated well. The most common ailment found was arthritis, consistent with hard labor, and severe dental problems. There was evidence of autopsy on one skeleton which researchers assume was study of an insane person. There was also evidence of one person who experienced spina bifida.⁶

The establishment of almshouses in Massachusetts is most significant in that it clearly marks the shift of support of

the poor to government. It was this self same shift in public policy that caused the City of Boston to take back the Franklin School and the initial program begun by Henry Morgan.

To Morgan's Chapel

The Boston, more particularly, the South End to which Edgar Helms and Jean Preston were sent, was the product of two forces. Immigration and the industrialization/construction of the United States and the City of Boston. Immigration was highly encouraged as a source of willing but inexpensive labor for the many infrastructural projects needed to construct a metropolis. Most northern European immigrants were farmers, however, and left the coastal areas for farms at the frontier. Dorion describes the demography of the South End:

"As one walks the streets of the South End, he is impressed with the many racial traits there encountered.. The fact of the matter is, however, that the largest single factor is Irish with the Jews second. There are also a large number of British Americans and Negroes. Side by side with these live in lesser numbers, but in no insignificant groups by any means, English, German, Scotch, Italian, Greek, Syrian, Scandinavian, French, Austrian, and Armenian. The section also has its Chinatown."⁷

Later he continues with further demography of the area,

"A careful census reveals that cooks and waiters, unskilled help which cares for office buildings and stores, laundry workers and clerks make this their home. In other words, the South End is peopled for the most part, by those who are among the untrained. A distinction must be made, however, as to those who live in the lodging houses. Here are large numbers of young Americans who have come from

the country to start out in the various lines of industrial life. This section of the city, then, is composed of those of very limited resources. Reverses, hard times, loss of position, sickness, are veritable disasters which they are not prepared to meet. To all such Morgan Memorial comes with its ministry of helpfulness."⁸

Exploitation, such as had been witnessed by Helms in the North End was equally detrimental to residents of the South End.

The area which had in the early to mid-nineteenth century housed the middle and upper classes, was now an area of tenements, boarding houses, and houses of prostitution. Helms, Dorion, Christmas and Ferguson all describe the area similarly.

Christmas recreates the dialogue of Edgar Helms and his board in the beginning of his book.

"No use trying to keep a church open here." So members of the official board said as they sat one day in Morgan Chapel.

Vice flourished in the neighborhood. Around the chapel was the red light district of the South End in Boston, and that old South End had few rivals in iniquity. Houses of ill fame extended to the very doors of the church, and at times the house of worship seemed all but engulfed.

"No use," said members of the board. "Maybe a mission to try to rescue a man or two, but a church in such a neighborhood - never!"

One after another, men rose and gave their opinion that it would be impossible to maintain a regular church in such a community.

"But," said Rev. Mr. Helms, "if religion can't be applied to help these people down here, I don't want to stay in the ministry."

He said he had gone through the district and while there were many houses of ill fame in it, there were many little children in their midst. He had come down here and accepted the place at Morgan Chapel with the hope that he might do something for

these children. If ever a community needed a church, this one did.⁹

Helms own description of the situation is,

" I went into the most vicious neighborhood I have ever known. I have visited most of the slum sections in nearly all our American cities and most of Europe, but I have seen nothing quite so bad as the conditions around Morgan Chapel thirty years ago. When the foreigners settled in the North End the dive keepers moved to the South End. The police were in league with the keepers of vile resorts and it was perilous to traverse the streets day or night."¹⁰

Ferguson adds some additional color to the scene that greeted the young Helmses,

"The next assignment that fell to the lot of Edgar and Jean Helms was in the worst slum area of Boston. The place was called Morgan Chapel and it was located at 85 Shawmut Avenue. Surrounding it were lice- and rat-infested tenements housing foreign-born waifs of the industrial era. Jean had occasionally helped in the rescue work there and Edgar had preached in the chapel to an assembly of wretched men who were lured there on Sunday mornings by the promise of a free breakfast. The chapel was Methodist and yet it wasn't. The man for whom the chapel was named, Henry Morgan, had been an evangelist who had stirred Boston with his fervor, but he had come to no good end and had left only a ruin as a monument to mark the great work he had done before his death in 1884."¹¹

While the above descriptions are useful to understand the squalor of the South End, it is well to note that the work done by Morgan in his early years in Boston was all but extinct, "leaving only a ruin for a monument."

Here is one of the clear criticisms of Morgan's legacy. Morgan's lack of planning, perhaps out of his deflected interest, had left no shred of the programs he had developed, and only a vermin laden "Tramp's Chapel" as evidence of his

years of work in the city. Clearly again there was no consideration given to the future, no plan of succession, utilization or even preservation.

In brief, this was one of the times that threatened the very existence of Morgan Memorial because of the absence of planning for continuation of the programs, or even the chapel.

Initially Jean and Edgar engaged in the traditional rescue mission work, attempting to meet human need as they encountered it. First was the discontinuation of the breakfast meal, and attendance at the Sunday services dropped from 300/400 to 30.

The chapel was scoured from top to bottom, and the Baptismal tank which Morgan installed under the pulpit was transformed into a holding tank for water used in the showers Helms had installed in the basement.

Next, in his first pastoral letter, Helms announced the opening of an night industrial school in which there were to be classes in printing, shoe repair, tailoring, and carpentry. He offered to begin classes in sign painting, dress making, and sewing if there were sufficient interest. He next opened a music school with lessons in violin, mandolin and voice. The chapel restoration and classes were all staffed by volunteers. (note: Edgar Helms' music school was later to become the School of Music at Boston University)

As in the North End, Edgar was not intimidated by those who profited from vice in the area. An initial frontal attack

on the problem of prostitution - the chapel was housed between two brothels - literally got him nowhere. Mr. Jack Barres, a nonagenarian who worked with Helms in the very early days relates that Edgar's complaints to the police about the brothels got no attention because it was believed that the police were in the pockets of the operators. Edgar then hired a private detective to stake out the houses and develop a report which he then took to the police, expecting to get some action. Again nothing happened. Finally he employed this detective to pose as a real estate broker to ascertain the identity of the owners of the buildings in which the brothels operated. He confronted the owners who lived in the suburbs with evidence of the activities in their properties. One owner, a woman, came to Boston to see for herself what was happening. On her inspection, she turned the building over to the chapel, and Edgar turned the occupants out. The other, it is said, he purchased through the young man acting as a real estate broker, and he likewise cleaned it out.

Although his life was threatened repeatedly, first by the padrones in the North End, then by the owners of the brothels and bars of the South End, Edgar and Jean continued to work to clean up the South End. As funds became available through time, the chapel bought tenement after tenement, turning out the vice dens, and renting the premises to persons of little

means, later, to persons who were employed in Goodwill Industries.

In the South End it might be said that he engaged in his own form of urban renewal as a weapon to combat what he perceived to be crime. This early real estate activity was to have its fruition in the birth of the Massachusetts Housing Association, a sister corporation which not only acted as landlord for all of the tenement holdings, but also made mortgage monies available to employees of Goodwill when such monies were in very short supply.¹²

Edgar Helms Philosophical Development

This period of 1895 to 1900 was critical in Helms' life. He had to complete his final year at Boston University, and did so with sufficient distinction to earn the Jacob Sleeper Fellowship which permitted him to study abroad. It was not until 1899 that he either had the time or took the time for this study. Upon completion of his divinity degree at Boston University, he took an extra year of study at Harvard studying under Professor Borden Parker Bowne, a professor of metaphysics, who had a lifelong effect on Edgar, and on his role as a planner as we currently understand it.

Helms' actions were governed nearly equally by his perceptions of social welfare and his philosophy and theology. In 1935, in his unpublished South Athol address Helms said,

" Since that year (his year of study with Professor Bowne) I have had no difficulty whatever in matters of theology; and my conception of the universe is such that I have nothing but peace of heart and mind. I learned that the physical universe was essentially a spiritual universe. That matter was live, vibrating force, creating and conserving.... We are in a world vibrating with the personality of God. He is in all and over all.... Not a leaf upon a tree, not an insect, not a rock -- nothing but what He in His might has created it and maintains it. He is a part of all the great processes of life. The good God is with the sparrow, and we His human beings are not forgotten, but are constantly cared for by Him.... This thought is all - embracing, all - powerful God who becomes a part of our physical being; who is with us in all our thinking processes, and who is concerned with all of our emotions is a conception I can never forget."

His concept of man, and particularly service to his fellow man is seen further in his theological statement,

" I believe in the fatherhood of God. That involves the sonship and brotherhood of every man. I am ready to stake my life on the first and second commandments and that verse of the Fourth Gospel which says, 'He is that light that lighteth every man coming into the world.'

We may not be aware of our sonship. As soon as we recognize it and adjust ourselves to the Infinite, there comes the consciousness that we are sons. This experience takes place without reference to race, condition or color. The trouble with us is that we haven't the clairvoyant vision of Jesus to see the Christ in every man....

Then there is the social side of the Gospel, which is as fundamental as the individual side of the Gospel. Society must be converted the same as the individual. We must have government, social life, and industrial life all conforming to the spirit of God. All must be regenerated....

We don't see the Christ in every man because of racial prejudice, industrial strife or religious bias, but He is there, and in the degree we do see Him, we are the sons of God. A man's truest self hates untruth. Every man who comes in here has a divine self like that. It is our privilege to bring it into supremacy in their lives."¹³

In an interview with Rev. Henry Helms, former Director of Morgan Memorial and Edgar's son, he related that his father's concept of the Christ in every man to be closely akin to the concept expressed by Mary Baker Eddy, the discoverer and founder of Christian Science, and the Massachusetts Metaphysical College. One might assume that Edgar's thinking was greatly influenced by the level of metaphysical thought in Professor Bowne's classes, and in the city of Boston at that time.

While this thought created his operating philosophy toward his work with people, his theology remained Methodist, driven by the Disciplines of John Wesley to a life of service.

The above is presented to establish an alternative basis for Edgar Helms apparent lack of planning in the development of Morgan Memorial. We have earlier reviewed Sheldon's theoretical personality profile as Promethean, and here we are presenting the philosophical and theological basis for this apparent flaw in Helms administrative abilities. In its most simplistic terms, Helms literally relied on the "help of God." While difficult to challenge, his successes in developing Goodwill Industries as we shall see are not ascribable to careful and planful development. In short he was not a planner, rather one who carried with him the imprint of resourcefulness and religion of a "plainsman." His motivations to work were more metaphysical certainly than

physical. His beliefs appeared to be absolute, especially when expressed in later life.

The significance of Helms' philosophical development is extremely important. His imprint on all of Goodwill Industries world-wide today is still significant. In the 220 affiliated Goodwill organizations, the slogan, "Not charity, but a chance", is still operational. While recognizing human need, the methodology of Goodwill today still seeks out the kernel of dignity in every individual, the Christ if you will, attempting to assist the individual to a life of independence and self esteem.

Another source of Helms thought is ascribed to Louis Blanc, an historian of the French Revolution. Fisher discussing Blanc states

"...Blanc held that the present economic system pits every man against his brother in competitive struggle.... The first step toward an ideal society is to contrive some means whereby everyone shall be guaranteed work. He advanced the idea of state social workshops which would gradually replace the individual workshops and, with the disappearance of these private concerns, the socialistic state would come into being. Blanc did not believe that everyone had equal talents, but maintained that the talents man possessed were a measure of his obligation to society.

Man's recompense for his work, according to Blanc, should be according to his needs, hence the formula: 'From each according to his ability, to each according to his needs.'....

There are many parrallels (sic: parallels) between Blanc and E.J.Helms. Like Blanc, he placed the opportunity of developing man's personality and talents as a prerequisite for a just society. In order to develop fully, it is necessary, Helms maintained, that man must have the opportunity for constructive work. The right to work can be guaranteed only by a society as a whole placing the

worth of a man above that of property. He held that with Jesus, man is more valuable than a machine. Helms believed: The world does not owe every man a living, but society does owe every man a chance to earn a living. 'If man work not, neither shall he eat, a sound political economy as well as good gospel'

When Blanc was obliged to defend his plan to guarantee employment and thus gradually usher in a new order, he expressed resentment at the charge that his proposal was a materialistic one. He claimed that his plan of social workshops was laying the foundation for a nobler spiritual order by eliminating the materialist influence of misery. Blanc went to the National Assembly of France and pleaded with it to begin construction of his social workshops as nuclei of a new order.

Helms, like Blanc, conceived of social workshops as a means of remedying the ills of society. Unlike Blanc, Helms organized his workshops in a Goodwill Industries with the help of the church. However, during the early days of the administration of Franklin D. Roosevelt he took his idea to the national capitol, in an attempt to influence the procedures for relief and recovery of the national economy. He also requested two million dollars for the expansion of the Goodwill movement.

Helms was much impressed with Louis Blanc's formula: From each according to his ability, to each according to his needs. He believed this formula described society as it would be organized when the Kingdom of God is fully realized on earth in the day of which Pentecost was the prophecy. Ascribing it to Blanc, Helms quotes this formula and looked upon it as the industrial philosophy of Goodwill Industries."¹⁴

A further determinant in the ultimate development of Morgan Memorial as a social agency was the time Edgar Helms had spent in Europe touring various countries, viewing the then state of the art social services, as a Jacob Sleeper Fellow.

In Germany he became very familiar with the expression of German Christian socialism of the nineteenth century based on the work of Johann Hinrich Wichern. In brief the movement can

be characterized as a demonstration of practical Christian social welfare. It in many respects was Wichern's response to the oppression he saw in capitalism and the industrial revolution.

The undergirding principle of the movement was neighborly love which must be expressed in action on behalf of others. He founded schools, hospitals, orphanages, asylums, housing for migrant workers, and work for ex-convicts and delinquent women.

A result of Wichern's work was the formation in 1848 of the Inner Mission which had a direct impact on the development of human services at Morgan Memorial.

First, was the emphasis on constructive work for all members of society. Work today remains at the heart of all Goodwill programs.

Second, was the work with neglected children which Helms directly lifted into the Fresh Air Camps of South Athol.

Third, housing for transients, young or old, a concept that Edgar realized with the establishment of the Fred Seavey Settlement, a shelter for newly released inmates from Suffolk County Jail, later a home for recovering alcoholics and following that a haven for homeless young men.

Edgar Helms did not meet with Wichern personally, however, while in Germany, he did meet Adolph Stocker, a preacher, politician and community organizer. Stocker's beliefs grew out of the Inner Mission to the point of the

Emperor removing him as pastor to the court. Stocker organized the Christian Socialists, espousing the use of public resources for the provision of social services. He was strongly pro labor unions, and espoused producer and consumer cooperatives.

The experience in Germany, in addition to providing a view of Christian Socialism in action, clearly demonstrated to Helms that resources of the community could well be organized to meet human needs.

In England, he was strongly influenced by his visit to Toynbee Hall. The activities of the Oxford born settlement in the slums of London included free legal service to the poor; club or drop-in center activities for youth; educational offerings in music, art, languages, history and science; a "holiday" for children of the slums. Helms discovered dependence on the wealthy to provide resources for physical facilities. He also discovered that service delivery was performed by the well to do who would volunteer for specific periods of time, then leave.

The settlement house idea demonstrated at Toynbee Hall was transported across the Atlantic first to New York. The Neighborhood Guild was founded in 1887, reorganized to the University Settlement Society in 1891. Jane Addams founded the Hull House in Chicago in 1889, assisted by Ellen Gates Starr. The first settlement in Boston began in 1891, founded by Professor William J. Tucker of Andover Theological

Seminary. It was first known as Andover House, later, in 1895, it became known as the South End House. Its first director was Robert A. Woods, another devotee of the thought of Toynbee Hall. Today the South End House is known as United South End Settlements.

As a Jacob Sleeper Fellow Helms observed and was profoundly influenced by the organizational structures he saw and the programs he observed; to the point that his "plan" appears to be a duplicate of things observed in Europe and the United States.

Of this influence, Huddleston says:

" The influence of the Social Settlement Movement is also seen in the fact that Rev. E.J.Helms was one of the leading figures in the establishment of the Epworth League House, later known as the University Settlement, and somewhat later as the Hull Street Mission in Boston's North End"¹⁵

Therefore in summary, we can look at Edgar James Helms as the product of significant forces: A religious and resourceful plainsman, deeply imbued with lifelong Methodist thinking, well educated in the physical and metaphysical nature of man and the world, committed to social and economic justice as seen in the German Christian Socialist Movement and highly respective of the Cooperative Movement of Toynbee Hall.

While not a planner, Helms was certainly a clear social thinker. His vision, nearly a hundred years ago is not only operational and relevant today, but it also represents some of the "most progressive" public policy today, a recognition by social and economic planners that development of dependency

upon the public treasury for one's sustenance is a self defeating soporific.

Early Settlement House Work

As previously stated, Edgar and Jean began their life together at Morgan's Chapel as a challenge. Edgar, having insisted on essentially a free hand to develop the chapel as he saw fit, was granted such a license. His early determination of the conditions around the chapel were those associated with vicious poverty. We have seen above what these conditions were. Edgar recognized early that the hope of his mission here was with the children - numerous children who were left to their own devices all day while their parents attempted to eke out an existence.

The work actually began with a major cleaning of the "Tramp's Chapel". With a group of volunteers, Edgar and Jean set to the task of removing years of grime and grit from the now aging chapel. The baptismal tank, used by Henry Morgan for immersion was uncovered in the floor and used as a hot water storage tank for public showers for which Edgar charged five cents. Since few of the tenements had basic plumbing, this was a marketing coup.

The Industrial school begun by Jean the year before was enhanced. Classes were not only run on Saturdays, but evening classes were begun. A rudimentary employment bureau was es-

tablished and staffed by volunteers; however, Edgar's heart was in work with children. On the founding of the Day Nursery, Christmas writes,

" He told of the time Mrs. Helms went into a tenement building and heard children crying. She hunted up the janitor to see what the trouble was, and they found three children locked in a room, and a piece of dry bread on the table.

'That's nothing,' the janitor told her. 'The mother works. Lots of them like that.'

The pastor turned to the board.

'What would Jesus do if he were here?' he asked.

'Wouldn't he minister to these children?'

He then told of plans to put cribs in the vestry of the church and take care of the children of the mothers who must work. That won over the doubtful ones and turned the tide. The official board, none too hopeful, let the work go on."¹⁶

A pivotal person in the development of children's services at Morgan Memorial was Miss Mary Fagan. She was a woman who had spent her life until she met Edgar, as a governess to small children of wealthy Back Bay families. Shortly, in fact during the summer of 1896, the Helms, found that their child care center was overwhelmingly successful, and help was needed. Mary F. Fagan was recruited to run the enterprise. Of her service Edgar Helms writes,

"That was a great day for thousands of poor children when the new Superintendent met Miss Mary F. Fagan and induced her to go home with him to dinner. She had been a nurse for the rich children of the Back Bay and the suburbs. When asked to give up her prosperous job and take charge of the poor babies around Morgan Chapel she burst into tears and confessed she had always prayed that she might sometime have poor children to care for. When asked what wages she demanded she said, 'Give me a place to sleep and something to eat and that will be enough.' During the thirty years she has been with Morgan Memorial, about three thousand babies

have been warmed with the glow of her motherly heart. If ever she showed partiality, it was always in behalf of the neediest and most ill-favored. She never asked for an increase of wages, but again and again she received the same. On an average she received more than most of our Morgan Memorial workers. None ever begrudged her. She never sought financial rewards, but God has given her everything she needed while she cared for his little ones. Just like Him." ¹⁷

By the spring of 1897, the day nursery had developed into a play school in which the sanctuary, pews and pulpit provided the areas for well supervised and directed activities for the older children. The nursery was moved to a room beside the sanctuary. Lucy Wheelock who had founded a kindergarten in Boston, later to become Wheelock College, was recruited to oversee the operation of the play school, and staffed it with instructors from her own school.

The Industrial School was under the direction of Miss Kate Hobart, initially a volunteer from the Boston school system, and on her retirement, was assigned to Morgan Chapel. Of her Helms writes,

"I never knew a more unselfish worker than Miss Kate F, Hobart. She has served longer than any other worker at Morgan Memorial. While she has specialized on the Industrial School, she has always wanted to help everything going, and has done so. While a teacher in the Boston Public Schools she worked at Morgan Memorial without pay. Since she retired from the public schools she has drawn a small salary from us. Some folks are born saints; others are made saints by many testings and trials. Saint Kate belongs to both kinds. No matter how trying her own burden, she has learned to bear it by lifting the burdens of others." ¹⁸

In the fall of 1897 the Music School began at Morgan Memorial. The pink school brochure announced that a full

staff was available to teach piano, violin, and cornet. Voice teachers as well as instructors in various instruments came from the Boston Conservatory of Music. Lesson fees ranged from ten to thirty cents for individual lessons and fifty cents for large classes in sight singing which lasted twenty weeks.

The School of Music got unusual support from the President of the Conservatory who offered free scholarships at the Conservatory for experienced teachers who were interested in advanced education and were willing to volunteer at Morgan Memorial.

The Birth of Goodwill Industries

"One day in the 1890's a ragged destitute group came to Helms saying that they needed food and clothes and could he help? He went into the wealthy sections of Boston and told the story of these unfortunates. He asked for money, which the well to do gave generously. He used it to buy food and clothing for the most needy and to pay rent for those threatened with eviction.

Such pleas were repeated, but with diminishing return because the newest financial squeeze in the United States following the Spanish American War, was shrinking pocketbooks of the affluent.

Edgar then took a burlap bag to Beacon Hill and Back Bay sections and asked, door to door, for cast off shoes, clothing, and virtually anything he could carry away. He made trip after trip and brought back to Morgan bag after bag of used clothing and other items.

When the streetcar conductor refused to allow him to bring the bags aboard, Helms resorted to pushing a wheelbarrow and walking up and down the better residential streets of Boston in search of salvageable material. Once he had reasonably ample supplies, he draped them over the pews in the church and hung out a sign inviting the needy to help themselves. He was appalled at the result.

Crowds flooded into the chapel, grabbing and fighting over every available item, causing such a commotion that an angry E.J. Helms went to the pulpit and announced that the church was being closed, the distribution of goods would end, and everyone must leave. Amazingly, the crowd dropped most of the goods they had snatched up and quietly left the chapel.

Helms was distressed, but about this time an exceedingly poor woman came to him and asked if she might have an overcoat which she desperately needed to fight the bitter cold. He located one that would do quite adequately and handed it to the woman. Instead of gratefully accepting it she handed it back. In broken English she remonstrated that she would not accept it as a gift of charity. She insisted in paying for it even though she had only a small sum of money with her. Reluctantly, Helms accepted the money and the woman smiled proudly as she left with the coat. This, Helms later noted, convinced him that the poor could retain their self respect only if they were required to pay something, even a token amount, for whatever was offered to them. He then put low price tags on the used clothing he had acquired, invited the neighborhood to come and purchase what was needed, and begin, in effect, the Goodwill Store concept.

Many of the items he had collected needed repair, so he allowed some of the women in the South End to work out the purchase price by repairing and refurbishing the used materials. As financial panic spread, men and women in need of employment and unable to feed or clothe their destitute families begged Helms to give them 'a chance,' not 'charity.' Sales of clothing would provide at least small amounts of income to reimburse those who worked to make the shoes, dresses and other merchandise saleable. In this way the workshop system got underway at Morgan."¹⁹

There is another version of the beginnings of the Goodwill Industries related by Rev. Henry E. Helms, son of Edgar, in his talk, "My Pop". The times and economic conditions described remain the same, the stories differ, however, in triggering incident and motivations. In the oral history, Edgar Helms had become the darling of the South End.

"If you needed anything, see Rev. Helms." Edgar is characterized at this point as being "Lady Bountiful" to the poor. And the poor did flock to Morgan's Chapel for their handouts. It is related that Edgar soon noted the same persons showing up repeatedly looking for the same things. It is said that on one occasion he followed a recipient who had received a number of topcoats out of the chapel, around the corner to a tavern where the recipient promptly traded the coat to the barkeep for a drink. Edgar noted that there had to be a better way, especially in view of his early Temperance views.

The story continues with Edgar's determining to change to system by inviting those seeking items on the following day to come and help refurbish them so that they might pay for them.

Nearly immediately, the men vanished sending their wives with small babes in arms to secure things for them. "How could that Rev. put them to work?" Edgar, up to this challenge is said then to have begun day care in the chapel by pushing benches together, suggesting that some of the mothers might watch the children while the others went about the business of mending various garments and restoring household goods.

Mr. Frederick C. Moore, volunteer, paid assistant to Helms, and finally successor to Edgar Helms as chief executive of the operation writes in 1952 of its founding:

"In the meantime people of the community were flocking to the Morgan Chapel with both hands out asking for help. Ministers of the various churches began to learn of the work that Dr. Helms was attempting to do in the South End, and he was invited to go to some of their churches and clubs

to tell about the work and the plans he had for the future. Because of these talks of the need of these people packages of clothing etc., were being sent in, sorted, and put into what was called a 'Relief Closet.' This clothing was given away when there was a great need. As soon as this was discovered, people were flocking to Morgan Chapel for help saying, 'give me, give me.'

After this plan had been carried on for a while, Dr. Helms felt that while people were needing clothing, and especially where there were children and sickness, they should be helped and things given free; yet he felt that he was encouraging people to accept charity, rather than building up self reliance. I remember as he talked over these matters one evening, he said, 'I am going to find a way in which I can help these folks to help themselves. The first thing I am going to do is open an Employment Bureau.'

I am asking Miss Mary French, a missionary returned from India, a fine Christian person, to take charge of Em- (print error here) and try to find employment for these folk.' So there was started the first Employment and Welfare Bureau in connection with Goodwill Industries. Of course, at that time Dr. Helms did not realize that the pattern was being woven, that would spread all over America.

Many times the clothing that came in needed cutting over for children, or repairing, so that through the Employment Bureau, some employment was given to women who could do this kind of work. One day a woman appealed to Dr. Helms for a coat for her little girl, and she said, 'Dr. Helms, I don't want you to give me this coat. I have very little money, but I don't like to receive charity. I will be glad to give you fifty cents for the coat. I wouldn't want it given to me.'

The 'golden thread' started weaving again, and out of that suggestion made by that woman began another pattern of the Goodwill Industries. Dr. Helms got the idea!

'After these things are repaired, why not have a sale once a week? These goods could be sold at reasonable prices so that some of the folks could afford to purchase certain articles.'

So a small office in the old Morgan Chapel was turned into a sales room twice a week. Then again the 'golden cord' was being woven, and there was the germ of the Goodwill Store. Dr. Helms found that there was sufficient money taken in from those two days' sales each week to pay the persons who

were given employment repairing these articles. So the Goodwill Industries was born out of that very small beginning."²⁰

Helms writes very modestly about the founding,

" Then hard times came and out of work besieged us. Having no funds, we applied to Boston for cast off supplies of clothing, shoes, furniture, etc., which the destitute needed. We gave work to the poor people by having them cleanse, renovate and make new articles from the things sent in. We sold the articles for small sums to the poor, and used the income to pay wages to the destitute whose labor made these articles more serviceable. In this way began our Goodwill Industries twenty-two years ago."²¹

In each story, workers were paid small amounts in cash or in-kind for their work. It was at this point that he recognized that handouts were indeed a soporific, addictive, and demeaning to the individual. This greatly ran counter to his basic theological or philosophical view of man as a child of God, and clearly counter to his vision of the Kingdom of God and the Brotherhood of Man. He recognized that his "giving" created greater dependence upon him and his institution. While personally gratifying, it robbed those he had hoped to assist of their dignity and self respect. This was to be the most significant learning from the founding of Goodwill Industries, and it is today the basic creed of the organization expressed in the motto, "Not charity, but a chance," which continues today as the basic tenet of Goodwill.

A 1902 letter from Helms to Boston Organizations is quoted by Moore:

Dear Friends:

To find temporary work for the unemployed who apply to us during the winter months is one of our hardest problems.

You will notice by the enclosed report that during the past year we have done considerably along this line, but hundreds in distress have been turned away because we could find nothing for them to do.

To develop further this cooperative feature of our work, we are about to start a Salvage Plant, where we intend to use up all kinds of waste, such as paper of all kinds, old books, old magazines, rags, carpets, furniture, metals, etc., in fact almost everything can be used to good advantage. We expect to have teams to collect these things from our friends. With sufficient patronage, we can make this work self supporting from the start and give aid to hundreds of worthy persons in the hour of their great need by giving them a chance to earn what they get. Their self respect is maintained when we are able to keep them from becoming objects of charity. We do not employ the drunken hobo but the man who wants to help his family and do right. In order to carry out this plan we invite your hearty cooperation. We must at once reach the kind hearted, well to do people who give us their waste instead of selling it to the junk dealers.

It would be a great favor to us if you would mail us as soon as possible a printed list of your church or club membership.

Thanking you in advance for your kind interest in the matter, I remain,

Sincerely yours,
E.J. Helms²²

Founding of Goodwill Industries as a Planned Activity

While not fitting the classic models of strategic planning by today's standards, the beginning of Goodwill Industries appears to be the result of a strategic assessment of a situation, and an action plan derived. In either version of the story of the founding, Edgar is credited with attempting to meet a human need, initially head-on. He indeed was successful in doing this as evidenced by both versions. However, in both, his attempt did not produce the desired outcome. In the first version, chaos broke out in the chapel. In the second, he recognized the development of further dependence and the negative effects that his give-away program was having. He determined to correct the situation statically by taking a new course of action.

One might assume that he correctly judged the strengths of this program: A ready supply of used clothing and household goods available, a willingness on the part of the Boston community to share these items with the needy, a facility in which to distribute these items, persons willing to assist in this enterprise, the need for work for an indigent population, and the need to preserve the dignity of persons assisted in this manner.

The perceived weakness of the original give-away program is: although it was supposed to be meeting a basic need, it was not; rather, it was fostering development of dependence,

abuse of a charitable work, and maintaining indolence as a positive value.

The opportunity here was the ability to meet some basic human needs for food, shelter and clothing. There was also the opportunity to begin to influence persons perception of religious organizations, especially the chapel, in a most positive way, creating a climate for missionary work. However, unlike the Salvation Army, there was no forced religious activity, it was and remains totally voluntary.

The major threats to this system included the local economy from which donations were to come, the need to operate and manage an orderly system of industrial economy, and the willingness of the general public to continue to support such an effort.

One might further assume that this assessment was done very quickly among the company of Helms circle of assistants at that time, his wife, Jean, Kate Hobart, Mary Fagan, Lucy Wheelock, and a volunteer, Fred C. Moore.

In its most simple statement, Goodwill Industries was planned to become an economic endeavor, an industrial endeavor, a social endeavor to benefit persons in need.

The budget, if that is an index of successful outcome, was \$3,180.42 in 1899. In 1988 the budget of all the children of Morgan's Chapel, 178 Goodwill Industries in the United States and 42 in foreign countries amounted to \$555,000,000. At year end 1988, 86,634 persons were assisted by Goodwill

vocational services. There were 79,952 persons employed by Goodwill Industries.²³ After ninety-five years, one can safely say that this strategic decision by Edgar James Helms was very correct, that his plan at this point was valid, and that the outcomes of budget and persons involved/served or employed, exceeded the original concept.

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III THE EARLY YEARS

By 1898, Jean Preston Helms, after giving birth to three children, contracted tuberculosis while attending to the wife of the church's sexton. After what appeared to be prompt and excellent medical attention, Jean departed for Europe with Edgar as he began to enjoy his Jacob Sleeper Fellowship, studying institutional church centers in Germany and England. In the late summer of 1899, as they were preparing to cross the Channel to England, Jean fell ill again and returned home to Iowa to recover. Shortly after she arrived, Edgar learned that she had taken a turn for the worse, cut his stay in England short, arriving in Iowa just a few days prior to his wife's death.

Deeply depressed by the passing of his wife, Edgar returned to Boston only to find another crisis. The Chapel had been condemned by the City of Boston.

Because the chapel had been in virtual constant use, housing the day care center, the original "store", processing plant, industrial school, night school, temperance saloon and was the center of Saturday night performances for the neighborhood in addition to being the "Tramps' Chapel", the building was simply worn out, and it gave out.

There was an immediate need for a new structure to replace the old. Edgar's dream of a Church of All Nations in

the North End was about to become a reality through necessity in the South End.

Of this problem Helms writes,

" ...The old chapel had been used so incessantly that it became worn and dangerous. It had to be torn down and a new building erected in its place. Mr. Morgan had left no money for such a contingency. The Unitarian trustees did not want to use their denominational funds for this building. They wanted no solicitation to be made to the public for funds, for fear it would interfere with their own receipts. The new building was erected by placing a \$50,000 mortgage on the property, and a rapidly growing work with a large interest bill became a greater source of irritation."¹

The mortgage was in fact secured with the joint assistance of the Unitarians and the Methodists who matched each others \$2500 per year contribution to cover the payments.

In 1900, the old Morgan's Chapel was torn down with operations of the Helms group moving to temporary facilities while the new facility was constructed. It was completed in 1902 just eighteen months after construction began and housed two auditoriums, a gym, bath facilities, game rooms, classrooms, a nursery, kindergarten, employment bureau office, and relief work rooms.

Upon its opening in 1902 it was called Morgan Memorial, and it was in fact the first Goodwill Industries in the world, but not yet in name.

In very short order, with the new facility, Helms' work intensified. It was a time of great economic depression, and the needs of persons in the South End were manifold and diverse.

On the personal side, Helms married Grace, the sister of Jean Preston, who had been caring for the three Helms children since their mothers death. In 1901, the Helms family was intact again, and about to grow substantially to a total of twelve children.

The opening of the new enterprise in Boston was most propitious because the expanded capacity of the relief work rooms were soon filled with many middle class persons who had become victims of the financial collapse of 1902.

Helms worked incessantly to secure increasing amounts of household goods and clothing to fire the engine of his program. The wheel barrow gave way to the horse and wagon. This in turn was supplanted by a motor truck. While Helms spent considerable time as a mendicant in every part of the community, he also used some of his time to study his operation to make it more efficient and effective.

He recognized economy of scale early on. Through the efforts of Fred Moore, he was able to purchase sugar barrels at wholesale prices and place them in churches and clubs, centralizing collections and making that aspect more efficient.

The next transition came quickly on the heels of the barrels, the introduction of burlap bags. The bag was used extensively from about 1900 until the 1970's. It was the standard unit of measure of collections in published collection reports. Moore relates the transition to bags thus,

"... Then one day Dr. Helms stated that he had heard of a junk man who was placing bags in the homes of the people, having his name on the bag, and then he would call and purchase the contents. Dr. Helms said, 'Wouldn't the bag idea be just what we could use, except, of course, that we would not purchase the goods?'

Again the 'golden cord' was connected, for in the tea and coffee business we imported thousands of burlap bags from South America. Thomas Wood & Company, the concern I was connected with gave us the first thousand bags, so that is how the bag got started."²

If one examines this decision and its outcome, it is in fact very significant in the development of all Goodwill Industries. Fifty years later Moore writes of the bag decision,

" Naturally, Dr. Helms never realized at that time that within 50 years, more than 2,812,707 Goodwill Bags would be scattered over America, and that \$12,000,000 would be distributed in the various Goodwill Industries to handicapped persons who were given employment by working over the contents of these bags, together with other cast off₃ material such as furniture, etc., during one year."

While Moore recognizes the success of the decision, he removes the potential insight, plan, or other forethought given with his phrase, "...Dr. Helms never realized...."

In Moore's text it is also useful to note that he takes considerable pride in pointing out that the \$12,000,000 would be "...distributed...to handicapped persons who were given

employment." This work was written in 1952, and the prevailing attitude among Goodwills was typified in that statement by Moore. It is quite typical of the attitude which we shall examine in the next chapter, that the provision of work by itself was an adequate demonstration of the mission of the organization.

Frederick C. Moore (1874 - 1958)

It is very appropriate at this time to detail the early influence and contributions of Fred Moore. Born and educated in New Foundland, Mr. Moore came to Boston in search of employment. While looking for work, he stayed with friends in Melrose, Massachusetts who knew of Edgar Helms and his work. Moore was introduced to Helms in 1896 and Helms was immediately "taken with him." Moore joined Morgan Chapel and was persuaded to do volunteer work in the evening school and Saturday Industrial school. From 1896 until 1901, Moore was employed by Thomas Wood and Company, tea and coffee importers. In 1901, Moore was asked to take a position in Montreal, Canada, as manager of manufacturing. Moore left Boston for Montreal. The following year he returned to New Foundland to marry Miss Carrie Minty, a school teacher. Later in 1902, Moore received a number of letters from Helms importuning him to come to Boston to work with him because the work of Morgan Memorial was beginning to overwhelm Edgar.

Fred and Carrie Moore came to Boston in late 1902, taking up residence in an apartment in the Children's Settlement. Fred began to work as Edgar's assistant; Carrie as a teacher in the Day Nursery, a job she held for fifteen years. Fred Moore's presence here is most critical in the further development of Morgan Memorial because he was as previously stated, the epimethean balance which appeared to be so needed by Edgar.

Anecdotal material gathered in conversations with Henry Helms, Dr. Emil M. Hartl, Mr. Jack Barres, and Mr. Lawrence Black, all of whom worked with or knew both Edgar and Fred clearly indicates that Edgar was moved by impulse - "seeing a need he sought to meet it." Fred Moore on the other hand is characterized by all as the counterbalance to Edgar, the "how to get it done man", the "bean counter." Nearly as soon as Goodwill began to spread beyond Boston, Fred Moore was effectively in charge of day to day operations. Edgar was the idea person, Fred the implementer, maintainer. As this history evolves further, Moore will surface again and again. This writer feels that an introduction of Mr. Frederick C. Moore is important at this point.

Other Developments in the Founding Years

The year 1903 saw a continuation of the activities already begun; however, it was the first deficit year

experienced by Morgan Memorial. The Unitarians had contributed their \$2500 for the mortgage, and that amount was matched by the Methodists. Despite this support and all other revenue, an amount now of \$9,960, Morgan Memorial had a deficit of \$170. The task of balancing the books was delegated to Moore, a task he held until Edgar's death in 1942. He served as business manager of the now rapidly growing enterprise.

In 1904, there was national recognition of the work of Morgan Memorial. At the Exposition in Saint Louis, Helms was presented a gold medal for the work of Morgan Memorial. A total of fifteen churches were so honored for their institutional work.

The next year, Morgan Memorial was recognized internationally with another gold medal at the international exposition in Liege, Belgium. This time the award was not shared because it was a grand prix, a first place honor.

The award reads,

" My Dear Sir - It gives me great pleasure to inform you that the exhibit of the institutional work of your church, as installed and interpreted by the American Institute of Social Service at the International Exposition of Liege, 1905, received the highest award, the Grand Prix, from the International Jury in Social Economy. The diploma for this award will be sent you at the close of the Exposition.

(Signed) W.H. Tolman
Director United States Section
Liege Exposition₄
(Social Economy)⁴

Formal Incorporation

With the recognition accorded by these two honors, the work continued to grow in Boston. Grow to the extent that it appeared necessary to incorporate the Industrial Relief Work. On August 25, 1905, Morgan Memorial Cooperative Industries and Stores were incorporated for the purpose of "educating and extending relief to poor and destitute persons, of improving the dwelling places and living conditions of the poor, and of giving religious instructions."⁵

With the formal incorporation, the work of Morgan Memorial was now a separate legal entity from the chapel, and the relief organization was able to rent the space of the chapel for \$100 per year. It was, however, a thinly veiled separation because in the day to day functions it still was the activity of the Chapel. There were two boards which had to continue to work together. The church board composed of both Methodists, and Unitarians who were responsible for the chapel, and now the Morgan Memorial Board composed of Edgar's collaborators, and virtually all Methodists.

Founding Fresh Air Camps

Hannah Parker Kimball came upon Edgar's work in 1905, first donating a tenement building which was to become the

Children's Settlement, next inviting Edgar and the children to her farm in So. Athol, Massachusetts. During the summer of 1905, the children who came to the farm on the train, stayed just a short while. Ms. Parker Kimball then donated some acreage of her farm with the provision that it be used during the summer for children's work.

In 1906, the Fresh Air Camps were founded by this grant from Ms. Kimball, and the first building erected, Downey Camp, by the men of the South Athol Methodist Church. The materials for this camp are said to have come from abandoned chicken coops and barns. The building still stands today and is used by teenage girls, in accordance with Ms. Kimball's mandate. In the subsequent years, parcels of land were donated, purchased at minimal prices or traded to assemble more than 500 acres and more than thirty buildings at the "Athol Plantation."

While principally used as a recreational facility at present, the Camps have a history of their own which is extensive. Mr. and Mrs. Lawrence Black who have been life long residents of South Athol are able to detail the development of the Camps from the first parcel to today's use. Mrs. Black's, nee Lindsey, family donated the parcel upon which Lindsey Lodge stands. In addition to providing recreation for children of the inner city the Camp has been used as a working dairy and poultry farm where alcoholic men could dry out and rehabilitate themselves. It saw the rise and fall of a carpet

making industry and a bottling operation for mineral water and ginger ale, still referred to by some as "Morgie Beer."

While it served for a brief time as the headquarters of the Mohawk Trail Goodwill, in Edgar's plans this was to be his closest attempt at creating his Utopia. He attempted to set up a cooperative community based on his study of Toynbee; however, like all Utopian cooperatives, this one failed also. It is extremely difficult to determine the thought underlying these activities to determine the planfulness of Helms prior to their inception. It does appear that they are the result of occurrence, chance happenings where again the resourceful plainsman used the opportunity at hand to attempt to accomplish his purposes. The influences of his study and travel during his Jacob Sleeper Fellowship year are apparent, similarly apparent is his deep love for children, and his feelings of a need to do something positive for them. This is a continuing theme throughout his life as we have seen in his first days at Morgan's Chapel.

Back in Boston, 1907 saw the opening of the Morgan Memorial School of Applied Christianity. It was a course open to all denominations which taught volunteers for church work. It was advertised as "Religion as Applied to the Political, Social, Industrial and Economic Problems of the Present."⁶ This school was later absorbed by the Deaconess Training School which merged with Boston University in 1917 to form the

Boston University School of Religious Education and Social Work.

Initial Plan Progress Report

On February 15, 1907, Edgar wrote a letter to the Methodist and Unitarian Board which is exuberant in tone, and is an excellent summary of what he felt to be a most important accomplishment in his first years at Morgan Chapel.

"Twelve years ago when I came to Morgan Chapel, nearly every house on Corning Street was a wide open place of licentiousness. Even the policeman on the beat had a key to the chapel and was caught bringing women into our vestry for immoral purposes. It has been a long hard fight.

We finally got rid of all but three or four. These were conducted by one woman who owned one house and hired the others to landlords who cared for nothing except high rents. Well, last month we had them arrested and convicted again. Through the police, we have induced the landlord to put them out of his house.

The police have told us if we would take that house and put in clean decent people - it is next door to the one owned by the woman - the police would stand by us and close all the others.

I have talked this matter over with the workers in the rug factory ... and they have promised to come and live there and pay the same rent as they pay elsewhere....

Indeed, it establishes a Settlement, an ideal lodging house in the midst of lodging houses that need just such a concrete example....

We will supplant⁷ the "House of Perdition" with a House of Praise.

It appears that despite lack of a formal plan, Edgar's massive will succeeded once again where others had failed. The conditions around the chapel, described in Chapter II, pg.53 were substantially improved twelve years later. The

outcome of activity reported here is hard to ascribe to other than to a planful attack on a severe urban problem, with no external resources. Evidence reported previously suggests that a frontal attack using the police was unsuccessful, an oblique attack through the operators had little impact, however the attack upon the owners appeared to bear fruit. It appears that Edgar utilized a persistent trial and error strategy to solve this problem. That strategy required twelve years to complete. One might argue that with a strategic plan, time to complete this objective might have been shortened substantially; however, social planners today, nearly 100 years later armed with the tools of academy and all the present day social sciences are not able to achieve similar objectives of social/neighborhood change.

Clearly the process might be challenged, but the outcome is apparent. The question remains: Was this truly planned? Was it chance? or Was it the indomitable will of one man?

First Published Annual Report 1908

The year 1908 is marked by the first published annual report of Morgan Memorial Cooperative Industries and Stores. It is a document filled with pictures and stories of individuals assisted by the various parts of the organization. Pictured inside of the cover page are F.C. Moore, Supt.

Industrial Work, W.J.Anstey, M'g'r Real Estate, C.J.Croswell, Foreman Rug Factory, A.F. Simmons, M'g'r Printing Department, Mrs.Lillie Simmons M'g'r Women's Store, H.A. Strong M'g'r Men's Store, Mary F. Fagan, Matron Day Nursery, Kate F. Hobart Sup't Children's Work, Amelia Ayres Employm't Bureau.

Selected sections of this report will be presented here to demonstrate the tenor of services rendered in this very young operation.

" 50,000 garments disinfected, cleaned and sold to thousands of persons too poor to purchase new things last year. That is only a small part of the story. The woman over there deserted by her husband would be unable to keep her children together and in school and church if she were not thus assisted through the store. Sickness from exposure to the weather would surely come to hundreds of others, who are by this agency, comfortably clothed. The work we have given to, hundreds of poor people to repair these garments or to sew carpet rags has kept them supplied with food and shelter and maintained their self respect."⁸

"A Few years ago the man in this picture was a hopeless drunkard, disowned by every relative and friend. He came to the Morgan Memorial so drunk he didn't know his name, nor recognize where he was. Kindness brought him to. He signed the pledge and became converted. For two years before he died he was in charge of our shoe store. During those years he persuaded hundreds of others to begin a sober life. When he died a year ago he was honored by all his relations and counted his friends by the thousand. This department sells about 5,000 pairs of repaired shoes every year to people too poor to purchase new ones, and has given work to many cobblers in need."⁹

The cover of the 1908 report proclaims,

" Cast-off clothing, shoes, etc. converted by the destitute into serviceable articles, sold for \$15,097.99, and paid in wages. Cast-off humanity converted into good citizens and made a blessing instead of a hindrance to the world."

Pictured also in the report are the Receiving and Disinfecting Room, The Women's Store, The Relief Bag, Men's Clothing and Household Articles, Press Room of the Printing Office, Shoe Store, Repairing Room, Temperance Saloon, all aspects of rug making, and the Fresh Air Camps buildings which numbered seven by 1908, just two years after the Camp's founding.

The first published financial report is impressive with assets booked on the balance sheet of \$56,856.60 a sizeable sum in its day and more impressive since the organization had been incorporated but three years. It is also interesting to note that the areas of men's and woman's clothing operations appeared to lose money which appears to have been subsidized out of carpet manufacturing revenues and rentals from adjacent settlement house properties.

The 1908 Report (pp.22-23) shows budget growth to \$29,081 (revenue and expense) with a net gain of \$5081.35. There appeared to be robust growth to Morgan Memorial very quickly.

In the five years from our first observation of fiscal matters, the budget had more than tripled, and had moved from a minor loss to a substantial gain position. The acquisition of F.C.Moore can be said to have been most fortuitous. From interviews with previously mentioned persons of the early years, Moore is credited with keeping Edgar within fiscal restraints, and Moore is credited with being an outstanding

financial planner, as well as one who could perform "damage control " functions when he could not restrain Edgar.

The Near Disaster of 1910

This seeming healthy organization, apparently well financed and operating "in the black", staffed with persons dedicated to the ideals of the agency would seem to be a case study in successful start up. Just as the world appeared rosy to the bustling Morgan Memorial in 1909, it became evident to the Joint Committee, the Methodist/Universalist Joint Committee established to oversee the real estate holdings left by Henry Morgan, a structure which was substantially different in denominational composition from the Board of Directors of Morgan Memorial Cooperative Industries and Stores who were all Methodist, that the Joint Committee could no longer continue to support the enterprise without some reorganization and restructuring and reassessment of responsibilities. On October 1, 1909 the Joint Committee requested the Young Men's Christian Association to release its financial interest in Morgan Memorial as provided in Henry Morgan's last will and testament. The Benevolent Fraternity of Churches in turn agreed always to keep a Methodist Episcopal Minister in charge.¹⁰

On May 6, 1910 the Secretary of the Joint Committee was authorized to notify the Boston Missionary and Church Mission Society and the Benevolent Fraternity of Churches that interest on the mortgage was past due and that the Franklin Savings Bank demanded a reduction of the principal of \$10,000 as well as the payment of interest.¹¹

Morgan Memorial was unprepared for the call of this note since its total rent outlay for the Chapel, its industrial and program space had been set at \$100 per year. Even with the gain of 1908 of \$5,800, this was a demand which quickly brought Morgan Memorial to the brink of financial extinction.

On July 20, 1910 the foreclosure was to be carried out. The situation is described by F.C. Moore,

"After associating ourselves with Dr. Helms in this work, a crisis came. Owing to the peculiar will of Henry Morgan, the new building had to be built on a mortgage of \$50,000 and, because of the conflict concerning the title, this mortgage was not paid off, although the interest was kept going largely through the interest of Courtney Guild, in putting on concerts, etc. Then, finally, the time had come when the money was not forthcoming, and so one day the building was put up for auction.

Just previous to the auctioneer putting up his flag, there had been a meeting of the staff workers, all praying that somehow the work must continue. Someone suggested that we sing that old "Foundation" hymn and they sang the second verse, "Fear not, I am with thee, Oh be not dismayed for I am thy God, and will still give thee aid. I'll strengthen thee, help thee and cause thee to stand, upheld by my righteous and omnipotent hand."

With such assurance and faith, it did seem as though prayers would be answered.

I said to Dr. Helms when the auctioneer's flag was put up on the building, "Is it possible that all of this work that you started is to be closed out? Suppose someone comes to buy the building today, would that be the end of it?" He said, "Moore we are

trying to be servants of God. We have worked out a plan. If today someone comes and buys this building, then the plan in this place cannot go on, and somewhere, somehow, other fields of service will be opened."

"But," he said, "As you know, we have been praying a lot about this, and somehow I believe that things will come out all right."

The auctioneer came, and what a moment! Our workers gathered in the little office at the front of the building. The auctioneer made his talk, but no one came to buy. The bank took it over. Then Dr. Helms said, "I know that God intends that this pattern should continue weaving and that the work will be carried on." Then almost immediately Dr. Helms called to the many friends who had believed in the work and who had helped it, stating that we must go out and raise this money. The bank donated \$10,000. There was \$40,000 to be raised. It seems unbelievable but within six months that \$40,000 had been raised.

At the burning of this mortgage, Dr. Helms made the following statement, "FROM NOW ON, WE PAY AS WE GO." This has become a slogan at Morgan Memorial, and up to the present time we have lived up to that slogan and there is no debt whatever on any of our buildings.¹²

In the life of this fledgling organization, this was the first of several threats to its very existence. It is the intent of this writer to examine the matter and attempt to ascertain if it was the result of poor/no planning, circumstance or chance.

Could this situation have been avoided? Could the impact have been lessened?

Analysis of the Crisis of 1910

The circumstances surrounding the crisis are well known in history, so one can assume that Edgar Helms and Fred Moore

were aware of the peculiar will of Henry Morgan. They most surely were aware of the need for the support of the Methodist and Unitarian Churches. The Joint Committee at the time of securing the mortgage on the "new Morgan's Chapel" appeared to be well invested in the project. Support for the mortgage on the order of \$2,500 per year was volunteered by the Committee. While the move to incorporate was seen at the time as a most positive action, the composition of the Morgan Memorial Board of Directors, original incorporators, were all Methodists. The work of the organization was seen as Methodist relief work. It had brought distinction to the church as well as significant numbers of new church members. In brief, Edgar had basically ignored fifty percent of his contributing constituency, a fatal flaw if there were really a plan. He clearly overestimated the generosity of the Unitarians whose support he needed to subsidize the \$100 per month rent on the new chapel complex. In addition, he appeared to be doing very well financially, since Morgan Memorial's real estate portfolio contained Boston property on Corning Street, Osborne Place, Shawmut Avenue, as well as acreage and buildings in South Athol. His balance sheet looked reasonably strong, so that one might question why there was a continuing need to subsidize Morgan Memorial Cooperative Industries and Stores.

While a newspaperman in his younger days, Edgar did not use his practical knowledge of communications to keep members of the Unitarian community well informed and invested in the

work of Morgan Memorial. He in fact had ignored one half of his constituency perhaps through neglect, perhaps through preoccupation with his developing agency.

Whatever the reason, Edgar was unable to perceive the basic weakness in his financial position in relation to the mortgage and the new Morgan's Chapel subsidy.

It appears that as early as the Fall of 1909 he should have been aware of the jeopardy under which he was working. If in fact the Joint Committee took formal action on the matter of the chapel at its October meeting, there had to be discussion of the matter throughout the summer of that year. Since at least half of the members of the Committee were Methodists, there had to be communication of some sort, even if only rumors to alert Edgar and Fred to impending danger.

An author's surmise here is that Fred Moore learned of the situation very early and attempted to communicate the obvious threat to Edgar. Edgar in his apparently typical manner assimilated the information, but was so involved in his projects at hand that he did not want to realize the impending danger. This would be an occasion when his Promethean will clearly worked to his disadvantage.

There appears to have been ample opportunity to plan and execute a plan for fiscal responsibility prior to the foreclosure sale. It is interesting to note that immediately after the sale, sufficient funds were able to be raised to discharge the mortgage within six months.

An alternative scenario would have Edgar understanding the situation as above but believing that just such a crisis was needed to enable him to raise funds independently. The Joint Committee had forbidden fund raising activity as part of the rental agreement as we have seen. If the latter were the case, it would appear that Edgar knew exactly what he was doing. He had calculated the risk involved and took it. He freed the organization from an extra layer of governance, and positioned it for future development by removing the fund raising restriction. He clearly demonstrated his ability to raise money for the work of the organization as demonstrated by the funds raised within six months to discharge the mortgage.

While he nearly brought the agency to its end, without the ability to raise substantial capital, as we shall soon see, he could not have expanded the services of Morgan Memorial in the short period of time in which he did.

In the conversation reported by Moore, Helms is quoted as having said , "We have worked out a plan. If today someone comes and buys this building, then the plan in this place cannot go on, and somewhere, somehow, other fields of service will be opened."¹³

The plan referred to here is the Goodwill Industries Plan of self help using contributed goods to provide the basis for an alternative or secondary industrial undertaking. It does not appear that Edgar had a financial plan. The words

somewhere, somehow, indicate either a lack of specific plans, ultimate reliance upon his Creator, or might indicate that he was just trying to be evasive, having conceived the outcome of this apparent tragedy.

Helms own written history of Morgan Memorial, "Pioneering in Modern City Missions," is silent about this incident.

New Growth in Facilities and Programs

Whether by design or by happenstance, Helms was now free to begin the greatest phase of development of Morgan Memorial because he was free of the constraints imposed on fund raising. He clearly was a master of this art, demonstrated in 1910, raising \$50,000 in just six months, including a \$10,000 contribution from the Franklin Savings Bank.

Helms methods were straight forward and effective as reported in his book. He made the acquaintance of the Henry family in 1912, and his account of this is as follows.

" While going as a delegate to the General Conference of the Methodist Episcopal Church in Minneapolis in 1912, I became acquainted with the General Secretary of the Y.M.C.A. of Manchester, N.H. who was a delegate on the same train. He told me of the Henry brothers of Lincoln, N.H. who, he said, were very generous. From his description I felt sure they would be interested in our proposition. I later found that their pastor, Adolphus Linfield, was already interested in our work and through him I obtained a favorable introduction and cooperation. These men promised to look into our project. They soon visited us, and after investigation, they invested \$100,000 in building us a suitable factory adjacent to our chapel. At the same time James E. Clark, and

others, enabled us to enlarge and make sanitary our Children's Settlement and Church....

Mr. George E. Henry frequently said, 'I regard the investment I have made at Morgan Memorial as the best investment I have ever made.' He gave to the institution about \$350,000. He saw the work increase ten fold in volume and efficiency."¹⁴

Another major contributor to the development of Morgan Memorial was Sheriff Fred H. Seavey. Of the Seavey involvement, Moore writes,

" After Dr. Helms had got started in the work of the South End, he found that he had no facilities for taking care of the stranded men. A man who was discharged from prison had no particular place where he could get a warm and comfortable room and someone who would be interested in him.

In the meantime D. Helms was made Chaplain of the Charles Street Jail; and the Sheriff, Fred H. Seavey, became very much interested in what was being done through the workshops at Morgan Memorial and hoped that a building could be provided where such men could be taken care of instead of sending them to a cheaper lodging house. When Sheriff Seavey passed away, he left a memorandum with his sister, Mrs. Floyd, that a certain amount of money be used to erect the building. So with this fund, together with some help of Mr. George E. Henry, the Seavey Settlement was built in 1915."¹⁵

A major piece of documented support for Morgan Memorial's work came in the period 1912 to 1914 when a respected engineer, Edward A. Buss was invited to study the enterprise. The study published in January 1914 consists of 158 pages of exhaustive analysis of the operations of Morgan Memorial. It examines methods, personnel, financial and social functioning of the agency. This was proposed by Helms to Buss after Buss had done an extensive and meticulous study of the water system at South Athol. In the preface, Edgar Helms writes,

"' Mr. Buss, I wish our whole institution might be so thoroughly surveyed and studied.' He laughed and replied that he had long thought some religious and charitable institutions ought to be. I replied, 'I have no money to pay you for your study, but I wish you would make for Morgan Memorial a very careful and complete and critical study of all our work and give us your opinion.' He replied, 'I will make you this contribution if you think it is worth while.' I thereupon turned over to him all the data we had...."¹⁶

The report's last page is a most significant endorsement of the work of Morgan Memorial. It is so significant that it must be quoted here.

Hearty Approval

The work which you are carrying forward, and the methods which you are adopting, and the standards to which you are endeavoring to conform, all meet with my hearty approval, and should be regarded as promising still greater success in the future than in the past.

I see no opportunity for offering criticisms and making suggestions, as you are continuously studying and seeking for improvements, and exercising the "eternal vigilance" which is the price of success as well as liberty.

The plans which you are making for enlarging the various departments of your work as rapidly as the contributions from the public will permit, appear to me to be sane and sensible, and I hope that contributions will come in rapidly enough to permit the radical enlargement of the work at a very early date.

I congratulate you upon the excellent work that you are doing and your enlarged opportunities for the future, and upon the indomitable courage which you have shown in recent years in the face of many adverse conditions.

Respectfully submitted,
Edward A. Buss¹⁷

The work of Buss in 1914 was to serve Morgan Memorial well because it was the first truly strategic plan developed in the organization. While a magnificent public relations

piece which certainly had to be used in fund raising activities, this study clearly examines/performs an indepth strategic assessment of the organization, tests its basic assumptions, carefully analyzes trends, and affirms that the organization is absolutely on the right track.

The contribution of Edward Buss within the organization to this point has been a recognition of him from the building which he donated at the Fresh Air Camps, Buss Inn, which is used for senior citizen camping. The survey and study by Buss greatly contributed to the credibility of Morgan Memorial and of Edgar James Helms, particularly as he was to face the developments and challenges awaiting him in the next decade.

In the following year, a slightly less analytical, but patently more religiously and sociologically work by E.C.E. Dorion entitled "Redemption of the South End" was most laudatory of the work of Helms and his collaborators. In his preface, Dorion cites his sources for his study as follows:

"Aside from personal investigation and observation and various reports by expert sociologists, which I have carefully studied, I am indebted for some facts concerning the South End and Morgan Memorial to 'The City Wilderness,' by Robert A. Woods of the South End House; The Survey of Boston Methodism, by the Commission on Boston Methodism; The present and future of Morgan Memorial, by Edward A. Buss, consulting engineer, and investigations by Miss Oriola Eleanor Martin, sometime fellow in psychology in Wellesley and Radcliffe, and investigator for the Women's Educational and Industrial Union of Boston...."¹⁸

His study is an exposition in some detail of the many facets of the work of Morgan Memorial. In addition to a

recitation of the program components, Dorion interspersed vignettes of persons assisted by the processes.

His final paragraph in the book is another resounding endorsement of the work of Morgan Memorial.

" With these statements we come to the end of our narrative. Much more might be said - the record of the activities is almost interminable. It touches life at so many points, and has about it so much of human interest, that volumes are bound up within it. But enough has been written to give a glimpse at least of the institution and to indicate something of its scope of work. And not only that, but also to bring out in some relief the place that this enterprise occupies among social centers of the country. I have desired to do more than just catalogue its activities. Rather, has it been my purpose to point out its significance as an agency in city evangelism, and its place in our American life as a redemptive force and as a constructive contribution to national welfare...

The forces that have worked through Morgan Memorial for the redemption of the South End where it is located will bring about the same results wherever the masses are to be found, foreign born and American...The message of these pages to the social worker, the generous layman, the church in our crowded centers, is, Go and do likewise."¹⁹

With these ringing endorsements, and an organization which had grown in budget size to \$87,949.37, the time to spread the word of Goodwill was at hand.

A group from a workshop mission in Brooklyn, N.Y. came to visit Helms in 1915, specifically to study his workshop methods. The group was very favorably impressed and agreed to adopt the Morgan Memorial method. Edgar was invited to visit their program in Brooklyn, which was called Goodwill Industries. Edgar was taken by the name and asked to use it to

identify his work also. It was done. Brooklyn became the first affiliated organization with Morgan Memorial.

In that same year Edgar Helms went to Los Angeles to visit relatives. While there he was contacted by Dr. Vernon McCombs and Katherine Higgins who was a recent transplant from Boston who had been active in the Epworth League. McCombs and Higgins met with Edgar to discuss his work in Boston because they were trying to do something similar with Mexican-American persons in the city of Los Angeles. Inspired by Helms they were able to raise \$25,000 by 1917, and opened Goodwill Industries of Southern California on March 5, 1918.

While Los Angeles was organizing, San Francisco became the third city to open a Goodwill Industries, December 16, 1916. The driving force behind San Francisco was the Quickmire family. Rev. Samuel Quickmire served forty years at San Francisco.

After another stirring Helms speech in 1916 at St. Louis, Goodwill Industries was opened there by Rev. Thomas Greene of the Trinity Methodist Church.

With his message of urban industrial evangelism spreading throughout the United States, Edgar was invited to address the Council of Cities of the United Methodist Church. His address so captivated the audience with the statistics of his work that in November of that year, 1917, a four member team was dispatched to ascertain what course of action might be taken to insure the spread of this work to other areas. A Bureau of

Goodwill Industries was formed in 1918 as a Department of City Work subsidiary with Helms at the head of it, and a pledge of substantial capitalization from the Centenary Fund. The plan was to establish Goodwill Industries in at least thirty five cities.

Although substantial funds were to flow from the Centenary Fund, Edgar insisted that each Goodwill be autonomous, able to respond to local need. He did however insist in standardization of process/practice. Each new Superintendent of a Goodwill would be trained in Morgan Memorial. Each would be imbued with the Helms philosophy.

Virtually all appeared to be operating extraordinarily well at this point as Goodwill moved into the twenties. The Bureau of Goodwill Industries, the parent of Goodwill Industries of America was in place, and functioning well.

There was, however, a major opportunity missed by Morgan Memorial and the other Goodwill Industries. The birth of vocational rehabilitation was to occur with the returning veterans from World War I.

Missed Opportunity

On October 6, 1916, the War Risk Insurance Act was amended to include benefits for members of the armed forces who were injured in combat, This was followed by the Smith-Hughes Act of 1917 which provided:

" An act to provide for the promotion of vocational education to provide for cooperation with the

states in the promotion of such education in agriculture and the trades and industries; to provide for cooperation with the states in the preparation of teachers of vocational subjects; and to appropriate money and regulate its expenditure."²⁰

Further amendments to both acts laid the foundation for work with returning disabled war veterans, with participation by the state and federal governments in the costs of these services.

Edgar was obviously aware of this changing trend when he addressed the Methodist Publicity Bureau on January 2, 1919. He said

"I have doubt that we will need to do very much for the sick and injured soldier. The Government Vocational Board is making every arrangement for his care and development. There are certain types of soldiers, however, who may be greatly helped in the trades that we teach in these Good Will Industries and we intend to equip all of them in such a manner that we can teach a handicraft that will make them abundantly self supporting in the days to come."²¹

There was to be little or no concerted effort on the part of Morgan Memorial to engage formally with government in providing services specifically to veterans.

That opportunity was then handed to the American Red Cross of New York City, along with a \$50,000 donation by Jeremiah Milbank to establish the Red Cross Institution for Crippled Soldiers and Sailors.

While Morgan Memorial had been working with disabled persons as a matter of course, it did not present itself at a time when its foundation in vocational rehabilitation could

have borne great fruit. It was to be some forty years later before specific programs for disabled were to be developed in concert with government.

Fulton assesses the situation thus:

" Although Goodwill in Boston and Brooklyn had already engaged in the most rudimentary vocational training of the handicapped, there was no seeming awareness at this juncture in the movement's history that they were on the foundation level of rehabilitation. Recognition of this would take another generation and by then Goodwill's involvement in rehabilitation would be looked upon as a new discovery, a new departure, a new idea. The tremendous impact of giving the emotionally, mentally, or physically handicapped a means of survival and self respect was not then equated with the term "rehabilitation" although it might well have been."²²

While on the surface this appears to be a major opportunity for Morgan Memorial to take a place of eminence in the vocational rehabilitation world, it obviously chose not to do so. Rather, it appears to have been assessed by Edgar Helms as of little consequence at that time. Putting the decision into the context of what was happening in the Department of City Work and the Bureau of Good Will Industries, it may become clearer that Helms' mission, supported well financially by the Centenary Fund of the Methodist Church was clearly to develop Goodwill Industries as an industrial relief organization in which the handicapped were welcome. While it appears that there was no strategic decision made, it may be surmised that a very strategic decision was made not to divert attention and resources of

management to this endeavor because of the increasing financial and institutional support of the Methodist Church.

It may well be that a change of direction at this time might have interfered with a long standing dream of Helms.

The Church of All Nations which Edgar had sought in the North End, became a reality in bricks and mortar in 1919, and played a significant role in bringing a multitude of persons of different languages into the orb of Morgan Memorial. It was not only the result of Helms' dream, but of some careful planning as evidenced by this section of the Introduction to the Prospectus, Part I.

A careful and exhaustive survey was made of the neighborhood around Morgan Memorial by our Welfare Bureau in 1917. Another survey will be made by the School of Religious Education and Social Service of the Boston University in October 1922. The first survey revealed the need for our Church of All Nations which was built in 1919.²³

First Formalized Planning

After the glowing assessment of Morgan Memorial by Edward Buss in 1914, there are no published documents which reveal a planning process within Morgan Memorial. However, on June 1, 1922 a most complete plan for the development of all aspects of the organization was created and published. In the introduction Helms states,

"Of more practical importance than a 'Statement of Faith' are our 'Statement of Purpose', our 'Statement of Needs' and our 'Statement of Objectives.' All of these statements have been approved by all our workers. With these in mind those interested are invited to study the prospectus of every department. To the earnest student of religious, social and welfare work these studies are full of interesting suggestions."²⁴

The document is a masterpiece of strategic planning created some fifty years before strategic planning became popular. A visionary and very important piece in the history of the organization. The opening paragraph provides the purpose of the document.

"In the early part of 1922 it was generally agreed by the heads of the various departments of Morgan Memorial that a Prospectus of the whole institution should be prepared in the light of what we ought to do and become ten years from now. With this longer period in mind, the Church of All Nations, the Children's Settlement and Educational Department, the Seavey Settlement, the Goodwill Industries and the South Athol Fresh Air Farm and Industrial Plantation prepared its prospectus for 1922."²⁵

Part I of the Prospectus lays out the purposes of Morgan Memorial as an organization, the purposes of each department, the stated values of the agency, and the assumptions around which the programs are organized.

In the strategic assessment of the situation it uses available demographics, internal and external assessments of need, catalogues available resources and creates many measurable objectives with a time frame for their attainment. In the next chapter we shall evaluate these objectives against some outcomes.

Part II of the Prospectus consists of an operations manual detailing all operations at that time, with many components being reduced to courses of study for trainees in various aspects of the organization. The syllabi developed in the industrial and educational departments appear to be very complete, employing what might be considered "modern taxonomies" to ensure that the process is well understood by the trainee.

The Prospectus is very likely the product of a number of forces which began to operate within the "Goodwill Movement" as the twenties opened. Helms, supported heavily by the Centenary Fund was in the process of opening twenty five new Goodwills in cities over 100,000 population. At the 1921 meeting of the Bureau of Goodwills there was a call for standardization of all Goodwills. Edgar remained opposed to standardization of programs, insisting that each must meet the unique needs of its own community. He did agree, however, to standardization of the Goodwill Industries processes, administration and reporting.

Oliver Friedman, Business Manager of Buffalo Goodwill, so impressed Helms and the others in attendance at the conference that Friedman was directed to create a standardization manual from which all Goodwills could draw their practice. It may be from the conference or from Friedman's presence later in Boston as a trainee at Morgan Memorial that the Prospectus was drawn.

Executive Secretary of Goodwill Industries

While Helms remained Superintendent of Morgan Memorial, he carried a second position as Executive Secretary of the Bureau of Goodwill Industries. In many respects, the two positions became very intertwined with Edgar spending increasing amounts of time away from Boston, developing Goodwill in other cities. He was synonymous with both organizations.

As a persuasive speaker and a dynamic leader he was a major asset of the growing movement. His thrust for autonomy of each Goodwill was a growing irritant to some who saw it as disloyalty to the Methodist Conference. This negative sentiment which began as a whisper in the early twenties was just an irritant. However, by 1925, it nearly became the undoing of the Goodwill Movement.

1926 Crisis

In early 1925, the Board of Home Missions and the Church Extension notified Helms that they wanted changes made in the constitution and bylaws of the Bureau of Goodwill Industries which would recognize only members of the Department of City Work to be legal members of the Bureau of Goodwill Industries.

Helms wrote to all Goodwill Superintendents requesting that they seek different opinions from their lawyers because

as Superintendents, they would have no power or control over the matters upon which they interrelated. He asked each to respond by the Annual Meeting of the Board of Home Missions which was to be held in Indianapolis on November 19. Enough opposition was mounted to cause deferral of action until a committee might meet to study the matter. The committee was to meet in Philadelphia on January 8, 1926.

In anticipation of the meeting Helms sent the following letter to W.H.Gould, attorney for the Board:

"...If it is attempted to coerce them by unjust requirements, I fear the consequences. Your innate sense of justice will not permit you to allow any injustice. Because I believed in you, I have little anxiety concerning the proposed revision of our Goodwill Constitution.

The Goodwill Industries have gone on under the original Constitution in a most successful manner and in perfect loyalty to the Board of Home Missions. There is not a disloyal note that I know of anywhere... Our Goodwill men are now apparently being treated with suspicion by reports from some parties...

It is now proposed to disenfranchise these men who have made the Goodwills successful as the result of such whisperings by a legal technician. I confess my own soul rebels against such injustice to those who have always been loyal and want to be loyal..."²⁶

The letter continues with an admonition that those Goodwills in danger of being disenfranchised by the Board would probably stand independently and apart from the church since they were nearly all incorporated in their respective states.

Helms was convinced that the Methodist Church was bound to rule or ruin Goodwill.

While preparing for the January meeting at which Gould had sufficient support to make the needed changes, Helms was bumped by a car, injuring his knee. He was unable to attend the meeting. It was postponed one week, but he still was unable to come.

At the annual meeting in Milwaukee that February, Helms was able to gather sufficient support from among the membership of the Goodwills, but Gould appeared to be prevailing by citing what appeared to be illegal executive committees among the Goodwill superintendents. Gould held that while there could be Goodwill Superintendents on the Bureau of Goodwill Industries, the Department of City Work must have final authority. This was to be a critical point since the Methodist Church had invested so much from the Centenary Campaign, and was supporting the movement financially and morally. The Church wanted to follow its investment.

A compromise was ultimately worked out which got majority support. This included Goodwill Superintendents on the Home Board. Helms was defeated. He felt rejected and wanted to resign from the national position. He was however, reelected to the Executive Secretary's position overwhelmingly at the meeting.

Helms loss to the movement at this juncture would have been devastating. There were just thirty eight Goodwills around the United States.

His loss to Morgan Memorial would have had major negative impacts on program development, fund raising and on the very life of the agency. He was the embodiment of Morgan Memorial.

It is impossible to assess the impact that the loss of support of the Church would have been.

In 1927 Helms embarked on a world tour promoting the development of Goodwill Industries worldwide. During that trip he wrote his book, Pioneering in Modern City Missions, which details much of Helms early philosophical and theological thinking expressed as action.

By the arrival of the great depression, Morgan Memorial was fully operating its Goodwill Industries and Stores, Children's Settlement, Seavey Settlement, Eliza Henry Home, and the Henniker Settlement. It was providing day care, day nursery, after school and weekend programs for children. It was operating a summer camp in South Athol Massachusetts. With Prohibition, the Seavey Settlement House began to become less utilized because there were fewer and fewer alcoholic vagrants in the city. Morgan Memorial was providing a residence for women, training, educational, and rehabilitation services to adults in need through an organized volunteer corps of physicians, dentists, nurses and social workers. Helms had even recruited attorneys and barbers to contribute their time in service to Morgan Memorial's clients.

A unique feature which Helms introduced into his pay system was an expectation that for some portion of each day

every worker would spend time assisting in the educational, social service or religious functions of the agency. Paid time was to be taken each day to work at least an hour in this endeavor. A person's pay rate was determined not only by his performance on his assigned task, but also on how well and how willingly he participated in the other activities.

As the stock market crashed in October 1929, Morgan Memorial was somewhat prepared, perhaps better prepared than most for what was to come. The anthem, "We pay as we go" stood the organization in good stead. It would lose no physical facilities. It would lose no opportunities to meet the challenge of the coming decade of economic disaster.

Summary

In this chapter we have seen the first formalized strategic planning evident in Morgan Memorial. The need for planning became apparent to its leadership, most likely at the insistence of Oliver Friedman, and a plan was created. It may be asserted one more time that because of this plan and the assessment of prior problems that the "pay as we go, or we don't go" philosophy positioned Morgan Memorial Goodwill Industries for its growth in Boston during the twenties and for the lean Depression years to come.

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IV YEARS OF CHALLENGE

As the Great Depression overtook greater segments of American society in the early thirties, the resources of Morgan Memorial became more and more strained. Edgar Helms complained nationally through the National Association of Goodwill Industries by suggesting that Goodwills had become only 80% self supporting due to the decline in prices for goods and salvage.

In the spring of 1932 he wrote a memorandum to the National Association which posed twelve questions, perhaps more rhetorical than true questions. Among the issues raised were:

1. Is there any way whereby relief funds can be legitimately utilized to reduce past maintenance debts and care for present and future overhead?
2. Ought some Goodwill Industries to surrender their present buildings where their property is now not worth their mortgage indebtedness, and where they can purchase, in better locations, better property for a less sum than their present holdings?....
9. If all wealth comes from the soil, minerals and labor, ought our Goodwill Industries to give greater attention to utilizing the soil in farm colonies, for the sake of labor?...
12. Government and social agencies are now demoralizing the poor by insisting that supplies shall be given rather than work should be required; how can we bring our idealism to bear upon this situation?¹

It is very clear that the Depression was having severe effects on Morgan Memorial and all of the other Goodwills. Work relief programs were strained, resources limited, and earnings from its activities were dramatically reduced to the point of losing self support. While Helms complains about the

Hoover economy, he is similarly disquieted with Roosevelt's New Deal, and the National Recovery Act at this point. Just a little later in its history, Morgan Memorial participated in the program, marking the first government funding of a Morgan Memorial service. Henry Helms recalls from his boyhood that on days when there was not sufficient collections to provide work for those on work relief, there could be a hundred men in the Church of All Nations singing hymns all day. Philosophically Helms had a great problem with the "dole." Pragmatically, however, he was able to answer his first question affirmatively. His proposal for work relief was to be emulated by a number of governmental organizations as an alternative to the dole, with a similar philosophy resulting in programs like the Civilian Conservation Corps.

For Morgan Memorial the second question was moot. Since the day when the old chapel was to have been auctioned, Edgar steadfastly adhered to his anthem, "pay as you go."

The ninth question prompted the renewal of Edgar's interest in the South Athol Plantation. He directed Fred Moore to create a plan in which his cooperative agricultural community might be reborn. Moore used the Shakers as his model agrarian program. A professional farmer was hired in 1933 to oversee the poultry dairy and vegetable crops. For a period of time it seemed that the farm might just make it financially. The subsidy required to operate it became onerous, and the farming operations were discontinued over a

period of years. At the height of its operation, fresh eggs were shipped daily to Boston along with mineral water, rugs and produce in season. The Fresh Air Camps, however, continued to provide more than one hundred children from the inner city with "fun, food, and fresh air". During this period, there was a departure from the traditional camping program. A respite camp for mothers with small children was established as was the Crawford rest Lodge for older women.

The evolution of Morgan Memorial to this point appears to be a direct result of the planning done in 1922, which we will present next.

Outcome Evaluation of the 1922 Prospectus (Ten Year Plan)

Although the Prospectus did not forecast the Crash of 1929, the transformation of Morgan Memorial in the ten years subsequent to this very formal plan appear to be the direct result of this plan.

MORGAN MEMORIAL OBJECTIVES

I. General objective

In ten years Morgan Memorial should make its ideals and resulting methods of loving service so clearly appreciated by every man, woman and child in its neighborhood and enlarging parish, that they will assist in the unselfish enterprise of establishing the Kingdom of Love on earth.

II. Particular Objectives.

1. In Religion Morgan Memorial should be so tolerant that a child of God of any race or tongue will find worship of his heavenly father within the

portals of our beautiful Church of All Nations as natural as breathing and will recognize a Christian brotherhood in all our personal contacts.

2. In Citizenship Morgan Memorial should be so vibrant with the best of American ideals that immigrants will find in its schools of Americanization, University Extension, Handicraft, Music and Art every incentive to develop the best within these new Americans as their contribution to a better American civilization to come.

3. In industry Morgan Memorial should be so just and merciful in all its relationship that advocates of excessive radicalism or excessive capitalism shall be disarmed by the Christian spirit and democratic organization of Morgan Memorial. These Industries should not only "save the waste" but use the waste. By proper mills it should convert waste into paper, rugs, toys and other useful fabrics. An enlargement of plant is needed in order that more of the old, handicapped, and unfortunate may find in its workshops that the best help is that help which helps one to help himself by helping some one else.

4. In Children's Work Morgan Memorial should helpfully influence the unborn babe; and from first childhood to second childhood its program of education should provide such inspiration, instruction and forms of service that through its Children's Settlement and Church and Industries every home in its parish will feel influences which stimulate the best character and most useful citizenship.

5. In the Fred H. Seavey Seminary Settlement Morgan Memorial will minister to the homeless men in ways that will most quickly restore him to normal living. Its methods will be scientific and Christian adaptation to the needs of this class of men.

6. In the Fresh Air Camps, Farm and Industrial Plantation at So. Athol Morgan Memorial will develop and enlarging ministry to increasing numbers by producing new products, by building new human fiber and introducing new ideals in a new environment.

7. In Healing the Morgan Memorial Clinic treats the body, the mind and the soul. It will lay particular stress on preventing sickness by wholesome living. Its staff of physicians, psychologists, and clergy speak the various tongues of this polyglot population and skillfully and understandingly minister to the suffering stranger.

8. In the proposed Working Woman's Settlement the Morgan Memorial hopes to render Christlike ministry to many old homeless working women who need this same protection and ministry that Jesus on the cross lovingly provided for his mother. Who will help us to such a home for these most needy ones?

9. In the proposed Market Morgan Memorial desires to feed the hungry as well as clothe the naked. In this way it hopes to reduce the heavy burden of the poor who are unable to secure enough of wholesome food. Who will erect for us this needed market?²

These General Objectives were then followed by specific program plans which unfortunately were of one year in their duration. Each, however, was minutely detailed down to specific courses of study, division of duties and responsibilities.

Perhaps the most able to be evaluated as outcome against plan is that of Hubert Coates, Supervisor of the Fred H. Seavey Settlement.

Huber writes,

"The Fred H. Seavey Seminary Settlement has been forced into a new situation because of Prohibition and now we are confronted with the task of reconstructing our work. It is well therefore to define clearly our aims and to reach a proper status for the New Seavey type of service. The Prohibition law has reduced our number of guests. Formerly our dormitories were deluged with intoxicated men and alcoholic subjects. Now our dormitories are practically deserted by this type. The type of service we must render in not to the alcoholic, but to,-

- a. The wandering boys from every section of our nation who should be returned home.
- b. The unemployed men of all ages, both single and married who come to us from everywhere.
- c. The hundreds of boys and men of all ages of our local community and parish.³

Coates continues his plan detailing use of his facilities, suggesting modifications to the physical plant which would improve the program, and finally placing a cost upon the transition process.

Of all of the "plans" Coates appears to have created one which most nearly approximates today's strategic planning model as seen in Chapter I.

1932 Outcomes compared to Specific Objectives

1. It is impossible to evaluate "tolerance" and "Christian Brotherhood" aspects of Objective 1. However, if the objective is to increase numbers utilizing the Morgan Memorial and its services there appears to be a successful outcome as evidenced by statistical reports generated internally in 1932. Despite a declining population in the South End, 1922 to 1932 of children aged 1 to 24 by 25 percent, there was an increase in the number of children served from 1149 in 1923 to 1416 in 1932, an increase of 23 percent. The number of Protestant youth in the parish increased from 351 in 1922 to 407 in 1932.⁴ Therefore, had this objective been to increase the numbers of youth served in the parish, it would have been a marked successful outcome.

2. The Citizenship objective is not possible to measure, however, the continuation of the schools are significant in

that they are the genesis of many of the training programs which were later to evolve. A major reason that this objective cannot be measured is contained in the 1932 survey, "Morgan Memorial Community Boston, A Social and Religious Survey,"

ETHNIC CHANGES

But the changes in the character of population are marked and appear to be quite significant for the work of Morgan Memorial.

Outstanding among these is the very great decrease in the numbers of foreign born residents. This is marked throughout the area and is constantly becoming greater. Under our present immigration laws, the influx of many nationalities much in evidence here ten years ago has become almost negligible. This of course means a decrease in the need of ministries in foreign languages.⁵

While one might say that after ten years this objective was inoperative on the one hand, on the other, it might be conjectured that the Americanization plan, Citizenship initiatives were indeed effective.

3. This objective appears to have two parts, the first, relational and is impossible to measure. There is anecdotal material such as the Urbain J. Ledoux and his Jobless Army story related by Beatrice Plumb. Ledoux, the agitator and his army of fifty were welcomed by Helms, and so well treated that when Ledoux returned to Morgan Memorial after a series of speaking engagements, his army had deserted. There are also countless individual stories of this genre; however, they do not form hard evidence by which to measure this unmeasurable objective.

The second part is however well documented in not only bricks and mortar with the 1922 donation of the "warehouse

building" by the Henry Family, but also in other corporate records which indicate everything from rug manufacture, cutting worn adult clothing and restitching it into children's clothing, to manufacture of furniture from severely damaged other furniture. While ecologists today might wince, even the trash, old shoes and other waste was burned to provide heat for the buildings.

4. The children's work was carried on well in the Children's Settlement. In 1926 the Settlement was remodeled at a cost of \$175,343 much of the amount raised by the Woman's Auxiliary. The 1932 Statistical Report, previously cited shows an increase in the children of the parish enrolled in various programs from 351 in 1922 to 407 in 1932. This despite a rapidly declining population and a shift from family dwellers to lodging house residents in the parish. The outcome of objective 4 then must be seen as positive - very positive.

5. As noted earlier, the Seavey Settlement House because of Prohibition was in a state of transition, and clearly so noted. This gave rise to youth programs for homeless adolescent boys.

During the ten year interval its mission changed to meet a new need, then with Repeal, it was restored to its former use, and the Goodwill House, Goodwill Inn, and subsequently, the Charles Hayden Goodwill Inn was created.

Not only was this objective met, but it provides ample evidence that Morgan Memorial was very adaptable at that time

to changing needs in the community. While its long term plan here was clearly the establishment of a residential facility for homeless boys, and it well succeeded, it was also able to move back to assume a former role.

Objective 6, expansion of activity at the Fresh Air Camps, Farm and Industrial Plantation did not occur to a great extent.

Rug manufacturing continued during the period, as did mattress and pillow manufacture. The Mineral Spring had become a bottling works for Ginger Ale and the farm continued to produce some eggs, dairy products, and small amounts of fresh produce. However, with the advent of Prohibition, the supply of persons from the city needing to go to the country for rehabilitation was greatly diminished.

In most respects, objective 6 which called for expansion was not met. Maintenance, under changing conditions, however is very admirable as an outcome.

7. There is no measure of this wellness objective to be found. While there is evidence of substantial work on the part of volunteer physicians, psychologists, the Boston School Department, a defined Wellness Program as we understand them today was not developed.

The Annual Reports of Morgan Memorial from 1929 to 1935 indicate varying use of Medical Clinic visits:

1929	1332
1930	1209
1931	900
1932	1440
1933	1170
1934	2500 medical, 500 dental
1935	2700 medical, 500 dental

8. Objective 8. proposed to create a program for older homeless working women. A major gift by the Henry Family created the Eliza Henry Home in 1924 with the purchase and renovation of that building. The Eliza Henry Home was operated by Morgan Memorial until its destruction by the Massachusetts Turnpike Authority. It appeared that this objective was well met.

From 1929 to 1935 the number of persons served annually ranged from a high of 132 in 1930 to a low of 101 in 1934. (source, Annual reports, 1929 to 1935)

9. The market proposed by this objective never materialized. Helms' words on the matter were,

" Our Goodwill Industries ought to have a mission to the farmers of New England. One of the reasons for the high cost of living now prevailing is (to: sic) be found in the fact we are paying the profits to several middlemen from the time it leaves the farmer until it reaches the consumer. Twenty-five

years from now the present ten trucks of Morgan Memorial should become a fleet of 100 trucks that will reach the farmer within a hundred miles of Boston and bring their produce to the city and sell it to the consumer direct."⁶

Perhaps this objective never materialized because there was no detailed plan drawn for its execution, rather, it is only Helms statement that supports this action in the whole Prospectus.

Summary of the 1922 Objectives Against the 1932 Actualities

Of the nine objectives proposed there is clear evidence that four of the nine were completed at least as well as stated, two others as far as measurable data is available were also completed, indicating a sixty six percent successful completion of ten year objectives.

Of those not completed, two partial objectives were not measurable, hence could not be called completed while three entire objectives were not met. If one were to remove the last objective, Farmers' Market, because it appeared to exist only in E.J. Helms' mind, then the objective attainment percentage rises to seventy-five percent attainment over ten years. This is a creditable performance even by today's planning standards. It may also have proven to be a major factor that allowed Morgan Memorial to be so well positioned for providing increasing services during the Great Depression.

STATISTICAL SUMMARY OF PERSONS SERVED 1929 TO 1935

BY PROGRAM CENTER

YEAR	CLINIC	CAMP	E.HENRY	SEAVEY	DAY NURSERY
1929	1332	362	102	1675	96
1930	1209	409	132	1804	83
1931	900	386	115	2745	83
1932	1440	493	105	1534	76
1933	1170	435	112	2160	78
1934	3000	390	101	608	57
1935	3200	423	121	746	76

Revenue and expense reporting for the same period reveals a financially solid and programmatically sound organization.

REVENUE BY SOURCE 1929 TO 1935

	Industries	Athol Farm	Program	
Contributions				
1929	\$377,073	\$29,819	\$49,581	\$92,513
1930	\$340,720	\$32,078	\$80,050	\$74,265
1931	\$363,465	\$32,265	\$62,682	\$112,411
1932	\$338,326	\$24,563	\$43,176	\$153,763
1933	\$355,302	\$22,903	\$65,273	\$134,095
1934	\$415,261	\$29,302	\$20,343	\$163,535
1935	\$435,407	\$54,715	\$12,193	\$189,422

EXPENDITURES FOR OPPORTUNITY WAGES AND NUMBER SERVED 1929 TO 1935.

	Opportunity wages	Persons served
1929	\$197,746	1102
1930	\$200,196	1175
1931	\$230,832	1787
1932	\$247,935	1451
1933	\$271,113	3960
1934	\$287,738	3792
1935	\$305,144	3756

Because of the planning done in the twenties, Morgan Memorial was not only able to survive the Depression, but it was also able to increase its budget, number of persons served, and continue to place even greater payroll dollars back into its community. In many respects one might say that the Depression was a time of great opportunity for Morgan Memorial Goodwill Industries. Morgan Memorial was able to take advantage of that opportunity because of the sound planning that had taken place a decade earlier.

Edgar James Helms, Planner (slight evidence)

Within the Community Survey of 1932, tucked inside a paper bag book cover, I discovered a piece of note paper upon which Helms had done some of his own demographic analysis, not by nation, but by race. His notes read:

" Negroes in Parish 777 or 6.3% The percentage of black population for the parish according to the survey in 1916 was 3.4 (139 homes) Survey of 1923 3.8% (168 homes) Increase of 2.6% over 1923

Foreign born (Federal Census)

1916 - 3.4%
1923 - 3.8%
1930 - 17%
Married 51.5%
Single 31.7%
Widowed 12.8%
Divorced 2.5%
Unknown 1.5%

Religion by Faith (Families)

Catholic 17
Protestant 46
Prot. non-members 45
no distinction among children

On the reverse side of the sheet is written:

" Our great challenge is to devise programs of religious and social nature that will reach out into these 45 unattached Protestant Homes. The interest may be stimulated by ministerial and Layman visitation - Community wide Vesper Program - Urgency to unite (unite is crossed out) attend morning worship -

- Great number of young people in parish find us a great
Expert in Mgm Work
Quota in Industrial Relations
Colored Leadership in young peoples classes

(again crossed out)

This shred of evidence in Helms' own handwriting suggests that he might have been somewhat of a planner, at least in his later years. In this note he was examining the need, methods and execution of a plan to try to bring an additional 45 families into the Church of All Nations. While the lore of the man is that of a responder to impulse, Promethean, this piece of evidence leads this writer to believe that Helms was a private planner, and when circumstances prevailed that were coincident with a plan that he had already conceived, he would move swiftly into action, leading one to believe that his was masterful, forceful, impulsive, inspired decisiveness.

Goodwill Inn School, Emil and Betty Hartl, and the Beginning of Professional Programs

The architect of modern programming at Morgan Memorial joined the staff in 1932. Emil M. Hartl, Ph.D. and Elizabeth P.(Parker) Hartl, husband and wife, were to become known as "Mom and Pop" to more than 10,000 boys in their history with Morgan Memorial.

With the advent of Prohibition, and its increasingly stringent enforcement, the Seavey Settlement became less and less utilized. The Depression brought many boys to the City of Boston from farms and smaller communities. Many of these boys believed that there would be work for them there. For

most, Boston became another dead end, no work and worse, no home.

The boys were becoming a problem on the streets.

"A meeting of the Committee on Homeless and Transients of the Council of social agencies was called. Frederick C. Moore, Treasurer of the Board of Directors of Morgan Memorial attended. Marjorie Warren, Executive Director of the Travelers' Aid Society, informed the committee that existing shelters for the homeless and transients were unsuitable for the placement of youths. Moore suggested that the Travelers' Aid Society, Massachusetts Housing Association and Morgan Memorial team up to furnish shelter in the South End at 35 Kirkland Street for these transient, homeless young men and boys."⁷

At the same time there was a struggling young graduate student and his bride, a recent nursing school graduate, living at the Eliza Henry Home, Betty and Emil Hartl. It was customary for the students at the Eliza Henry to work somewhere in the Morgan Memorial complex. They had heard that the new halfway house for boys was to open and applied for the position. They were interviewed by both Helms and Moore for the position, and were the successful candidates, beginning work as the Goodwill House opened on December 1, 1932.

Of his appointment to the position which he held for fifty years, Hartl related to Alpert,

"Betty was a nurse, and I was six feet tall." Hartl further related, "It was a natural. I lost my mother at 11, my father by the age of 12. I'd lived with many relatives and friends in 'foster homes.' I'd been to five high schools in four years. I found that I not only had access to kids, but I was interested in their problems and having an understanding of what the issues were. I have a satisfaction in helping a kid orient himself to life."⁸

The initial program at the Goodwill House, soon to be changed to Inn, remained true to Edgar's and Morgan Memorial's basic philosophy, "Not charity but a chance," by creating a program where boys were expected to work to pay for their clothing and meals.

Roland Elderkin, long time collaborator and associate of Hartl describes the Goodwill Inn program,

"Emil Hartl was no 'flop house' warden. He is a man of vision who wanted the best for all folk. From the first day, the emphasis has always been on more schooling or job training, health care, more accurate diagnostic services and religious living. Great efforts were made to send the boys to school through the years beginning in 1933. If that were not possible, then for job training at specialty schools or on-the-job at Goodwill Industries. Along with this came the need for clinic work ups, ability tests and hospital referrals for mental health and physical care."⁹

It is also about this time that terms such as sheltered workshop and rehabilitation begin to surface in the corporate documents of Morgan Memorial. In the 1935 Manual for Goodwill Industries, there is reference to intake of referrals, case records and rehabilitation plans.

"83. Form 36 - Referrals from other agencies are developed by the referring agency and referrals from other agencies should be given every consideration not only in endeavoring to serve the client as desired by the agency and in accordance with Goodwill policies, but also in reporting back to the agency the service rendered and the progress of the client....

83. Form 38 Progress Record. The application card previously described is in a sense a progress record and it may be the addition on the inside blank portion of a complete list of the possible problems to be presented by Goodwill Workers and the possible services to be rendered to help correct those problems thus becoming the progress

card. The Family Welfare Association of America Statistical Card No. 1 is an example of the type of progress record which should be kept by Goodwill Industries for every worker receiving more than emergency service.

83. Form 39 - Face Sheet and Case Record. All Goodwill

Workers requiring more than emergency service should have a brief accurate typewritten record kept of their association with the Goodwill Industries, problems presented and services rendered and progress made toward the rehabilitation of the individual. In developing the typewritten case record, face sheet, form 39. or a combination of that sheet and the progress record suggested above shall be kept in the front of the worker's folder. The written record of the worker should consist of brief paragraphs recorded chronologically stating the problem presented at the time, methods suggested of caring for the problem and the results obtained. The case record should likewise be used to record items of interest in the progress of the worker which will help in better planning his future development." ¹⁰

It is interesting to note at this point some fifty-five years later that the Commission on Accreditation of Rehabilitation Facilities, the accrediting body for rehabilitation programs which grew out of the Joint Commission on Hospital Accreditation, still incorporates the above requirements for case recording and referral policy as a part of its standards.

The beginnings of professional rehabilitation practices were taking hold at Morgan Memorial. The convergence of Emil Hartl and the drive for professionalism, coupled with the newly developing fiscal relationship with government are the foundation stones upon which the modern programs of Morgan Memorial have been built.

As the rest of the nation slowly emerged from the great depression, the emergency demands on Morgan Memorial's services, especially emergency life sustaining services, began to subside, and there began to be time to develop more planful and less crisis orientation.

Comprehensive Client Centered Program Development

In 1938, Emil Hartl earned his Ph.D. from Boston University in Psychology. He nearly immediately made the acquaintance of Dr. William Sheldon of Harvard and began to work collaboratively with him to improve the quality of services at the now Morgan Memorial Charles Hayden Goodwill Inn. It was during the many conversations with Sheldon that Hartl began to formalize his thoughts on comprehensive assessment and comprehensive rehabilitation programming.

"This new emphasis on individualizing a program for a boy at the Hayden Goodwill Inn, initiated by Sheldon and developed by Hartl, was influential in conceptualizing and establishing the emerging rehabilitation programs at the Harry K. Noyes Center (see below) and Morgan Memorial Goodwill Industries. Every client is viewed as an individual, and a staff team creates an individual service plan for him. At Hayden this approach became a fundamental part of the boys' education and growth."¹¹

While developing individually tailored service plans, Hartl at this point borrowed the integrative approach from Sheldon, utilizing medical, psychological, vocational, and

social historical information coupled with empirical observations by all the staff to develop as nearly complete a composite of an individual as possible. Based upon all of the data, a carefully designed plan of service delivery was developed to insure timely and appropriate interventions of an array of disciplines, well coordinated, was brought to bear on the individual boy.

Thus the model for all later professional programs at Morgan Memorial was developed in 1939 and 1940, the integration of biology, psychology and sociology of an individual into a specifically designed program. Today's terms refer to this idea as comprehensive client-centered planning, and is required in nearly all human service delivery. The concept of a treatment team was introduced at this point as each discipline represented at a program planning meeting was assigned specific program tasks for each boy.

Hartl's work did not stop there. He realized very early in his career that there was a need to integrate vocational aspects into the program in the same client-centered manner. He then began to analyze the tasks at the Goodwill Industries, creating taxonomies of skills to be mastered in the various departments of the organization.

A key factor in development of the vocational programs for the youth he was serving was the donation of the Harry K. Noyes Training Center by Mrs. Noyes in memory of her late husband. The Center was originally used for providing specific

vocational training to the youth at Hayden School. It began in 1939, later transforming into the New England Rehabilitation-for-Work Center, the initial professional vocational rehabilitation program from which all present programming is derived.

In the history of the New England Rehabilitation-for-Work Center there is some acknowledgement of planning as a driving force behind the development of the center even at its outset.

"In virtually all instances when the agency initiated a new service the community need was most apparent and unmet. Some emergence of services occurred out of confrontation of people in acute, immediate need for whom other community services and facilities were nonexistent, or strong barriers in the community existed to meeting the person's needs.

Such a condition of unmet needs existed, especially among unemployed youth 16-25 years of age. Morgan Memorial established the Harry K. Noyes Rehabilitation Center in 1936 (sic:1939) to serve these youth. Young adults were given training in craft skills through work experience on industrial and business settings. Counseling and encouragement as well as practical assistance including food and shelter were provided as needed. With the passing of the acute post Depression period in the late 1930's two new conditions appeared: high employment in the defense industry and enlistment and drafting of young men into military service. At this time the Noyes facility was far less needed as a training and work center and was diverted to other uses associated with the salvage operations of Goodwill Industries. However, immediately after the war it became evident that the Noyes Center was needed for the retraining of veterans and in the rehabilitation of those who returned disabled.¹²

Edgar James Helms Passes On December 23, 1942

From 1935 until his death in 1942 Edgar J. Helms was active in the further development of Goodwill Industries across the United States and in a number of foreign countries. For all practical purposes, Frederick C. Moore was running Morgan Memorial on a day to day basis due to Edgar's attention to the affairs of Goodwill Industries of America.

His last column, published in "The Goodwill" published in February, 1943 shows him consistent in the values that lead him to found Goodwill Industries many years before. The column reads:

"As we look back upon 1942 we realize only too well the truth of the saying 'Time brings all things.' For surely there have been momentous developments that have left us aghast because of their obviously sinister implications. To many, 1942 marked a transition from the 'free and easy' days to a sober economy that of necessity invaded our liberties in order that we might preserve our freedoms. The overwhelming majority are solidly, vigorously and even passionately behind our government in its responsibility to defend and maintain our land with its institutions and our way of life. Despite all of these events and the portent of their meaning, we here at Morgan Memorial believe more surely than ever that our chosen work - service for those who are less fortunate - is destined to be an even greater bulwark for the needy in the days ahead. Now our workers are those who for the most part are physically handicapped in some way which prevents them from taking an active and remunerative part in our defense and war effort. Therefore, their need for clothing and food is still a vital problem. They must have work. We are glad to provide what we can and are doing it to the extent of about \$6,000 per week in self-respecting wages in our Goodwill Workshops. As we look into 1943 we know that our aims and objectives will be carried out as they have been for more than forty years. And with

the possibility of rehabilitation for those who may become incapacitated through our tremendous war program, we desire to keep our plant running at capacity.. This we shall do with the continuing help of you and hundreds of thousands of others who have confidence in our program of practical philanthropy which indicates that a man is best helped when he is given the opportunity to help himself.

(signed:) E.J. Helms¹³
Superintendent

Helms passing was marked by a throng of more than 1500 persons at the Church of All Nations. Tributes were paid to the man and his work by government officials and his church. While the most frequently quoted is that of Bishop G. Bromley Oxnam at Edgar's funeral, perhaps the most relevant for this work is one delivered upon his retirement from the New England Conference of the Methodist Church on May 16, 1942 by Rev. A.R. Mullins and reprinted in The Goodwill.

" To electricity God gave Edison; to the violin, Kreisler; to wounded, Florence Nightingale; Lincoln to the slave; Livingstone to the savage; to the unemployed, Dr. E.J. Helms and 'The Church Where Dreams Come True.'

What painting was to Raphael; what harmony was to Beethoven; what nature was to Wordsworth; research to Pasteur; socialism to Karl Marx; that was the unemployed to Dr. Helms.

Gideon put out a fleece, and God wet it with dew. Dr. Helms put out a Goodwill Bag and God filled it with hope. Jacob dreamed a dream and built a monument of stones; Dr. Helms dreamed a dream, and erected a Day Nursery. Moody was God's voice in personal evangelism; Dr. Helms, God's voice in social evangelism. The one would convert the sinning soul; the other, as well, the guilty system.

God touched Hoffman, and he made Christianity beautiful; God touched Handel and he made Christianity melodious; God touched Dr. Helms, and he made Christianity practical.

Dr. Helms builded a church that dares! Dares with her leader to be open of mind, warm of heart,

adventurous of spirit. Dares to fellowship the black man with the white heart, and denounce the white man with the black heart. Dares to set her social work to the rhythm of redemption; to pitch her Goodwill Song to the cadence of Calvary.

Dr. Helms builded a Church that cares! Cares with her leader, whether men have their 'daily bread' with the 'bread that cometh down from heaven.' Cares whether men are taken out of the slums, as well as slums taken out of the men. Cares enough to be a High Church: high as the aim of God is high. Cares enough to be a Low Church: low as the need of man is low. Cares enough to be a Broad Church: broad as the love of Christ is broad.

Thus did God mark an epoch with the gift of a man."¹⁴

This is indeed a very high tribute to be paid to a man during his lifetime by his Church. A Church with whom he had a significant number of confrontations in the earlier years of Goodwill development.

A more empirical measure of the man's personal work might be a comparison of the organization he left at his death to its beginning.

We know that the total budget for Helm's work in 1899 was \$3180.42. There was not a great deal in place except for a small chapel with some very rudimentary "programs".

The Treasurer's report for 1942 was published in abbreviated form in The Goodwill in 1943. The report not only enumerates persons and dollars, it provides an excellent capsule view of Edgar Helms' development of Morgan Memorial in Boston.

"... During 1942 we paid out \$333,978.03 in Opportunity Labor and Relief wages. This was better than \$6,600 per week and does not include the amount paid out in wages for regular workers, foremen, etc. This shows 695,118 hours of employment given in the Goodwill Workshops and

2,072 individuals who received temporary help. Despite the brisk demand for all types of labor in our War Industrial Program, yet we have more than 200 persons who are badly handicapped, physically or mentally, or because of age, that they cannot be placed in regular industry. In our Children's Settlement, Music School, Fresh Air Camps, Lucy Stone Home Outings, etc., 1592 different children and young people have been benefitted. The Fred H. Seavey Settlement for Men, The Charles Hayden Goodwill Inn for Boys, The Eliza A. Henry Home for Working Women and Young Married Students, The Goodwill Day Nursery for children of working parents - all of these activities have been run at their most efficient capacity during 1942...." ¹⁵

The report for 1941 is published in more detail in The Goodwill, enumerating in more detail the work which he had established.

PERSONS HELPED THROUGH THE VARIOUS ACTIVITIES AT MORGAN MEMORIAL IN 1941

Number of different children and young people enrolled in the Children's Settlement, Music School, Fresh Air Camps, Outings at Lucy Stone Home, Boy Scouts, etc.	652
Number of Children helped in the Day Nursery	49
Number of different men served in the Fred H Seavey Settlement for unattached men	1,668
Number of beds furnished	10,772
Number of meals furnished	26,027
Number of boys helped in the Charles Hayden Goodwill Inn	542
Number of persons at the Eliza A. Henry Home	135
Number of individuals given temporary employment in our Goodwill Workshops	2,276
Number of persons given employment for clothing, furniture, groceries, fuel, etc.	1,195
Number of hours of employment given in the Goodwill Workshops	732,441
Handicaps of those employed in the Industries:	
Age (unemployable in regular industry).....	204
Physical Defects	110
Social and mental	188
Other causes	579
Number of individuals or families given direct relief	753
Total number of families served	1,417
Number of persons for whom employment was secured elsewhere through our Free Employment Services	567
Number of positions filled outside Goodwill Industries ...	694
Number of parish calls made by workers	3,595
Direct relief given	\$11,031.68
Total Opportunity Labor and Relief distributed in 1941	\$327,054.78
Average per week for the year	\$6,289.00 ¹⁶

The Treasurer's report shows Morgan Memorial to now hold assets of \$1,827,280.14.¹⁷

Whether totally planned or simply guided by a vision, philosophy or his basic theology, Edgar James Helms left Morgan Memorial a large and very much alive social agency. As we can see from the data reported in the 1941 Report, work and children remained his focus throughout his life. It is of interest to note that he established a barter system for many of the services which Community Action programs have developed today: fuel assistance, emergency food and shelter, and most important to Helms from his beginning at Morgan's Chapel, an Employment Bureau.

While in its day this was indeed a remarkable program, it was more remarkable because at the time of his death, the Goodwill concept had been duplicated in numerous communities, at least eighty-two in the United States and sixteen in foreign countries.¹⁸

The basic values of work as a practical solution to man's problems in a social and economic environment have remained the cornerstone of the organization, and even today is seen in its motto, "not charity, but a chance!"

Frederick C. Moore was elected Executive Secretary of Morgan Memorial on March 8, 1943 at its Annual Meeting. Moore assumed the full leadership, title and role, which in actuality he had been carrying for many years; initially in the twenties when Helms was travelling a great deal to

establish numerous Goodwills nationally and internationally and devote a substantial amount of his time to the politics of the Methodist Church as well as to manage the affairs of Goodwill Industries of America, the national organization. In the thirties, Moore was similarly compelled to oversee the day to day operations of Morgan Memorial as Helms health began to fail.

After the outbreak of World War II, Morgan Memorial as well as all Goodwills in the United States became sources of material for the "War Effort." The salvaging operations which were established as well as the processing and transportation capabilities of Morgan Memorial made it a significant part of this effort. In the Fall of 1944 Morgan Memorial gave this account of its war effort:

OUR RECORD

From Pearl Harbor to Sept. 1, 1944	
Scrap Paper	12,683,524
Salvage Rags	2,936,617
Scrap Rubber	336,144
Scrap Iron and Metals	829,270
Miscellaneous	12,640
Total Pounds	<u>16,798,195</u> ¹⁹

While there appeared to be substantial talk, discussion and publication about rehabilitation, especially for those servicemen who would be coming back to civilian life with a disability, there appeared to be no real change at Morgan Memorial during the Moore years. Oliver Friedman, now (1943)

national Executive Secretary of Goodwill Industries of America was active pursuing all Goodwills to develop vocational training programs for returning veterans specifically. While Friedman was successful through Edgar Helms in setting some standards for operations of all Goodwills as seen in the 1935 publication, Goodwill Industries a Manual, he was not able to convince Morgan Memorial itself to begin to plan for the returning veterans.

A Major Opportunity Lost

From its inception in World War I, Vocational Rehabilitation had been conceived as a process of training around a disability, later, principally due to the Borden - La Follette Act of 1943, as physical medicine had more impact, physical restoration became another major component. In World War II, the Veterans Administration began to put together groups of Corrective Therapists to work in teams with disabled, hospitalized veterans.

As the allied health professionals, medical and nursing professionals began to work together, comprehensive vocational rehabilitation as it is practiced today came into existence, teams of selected professionals, who would impact upon the multi-faceted problems confronting a disabled person. Discrete disciplines would, by objective assignment, participate in service delivery prescriptively - essentially following the

medical hospital model with the physician writing the prescription.

In vocational rehabilitation it was the rehabilitation counselor who was charged with the coordination and integration of services to be delivered.

As the Second World War was in process, the basic philosophy of Morgan Memorial as a rehabilitation agency is seen in its publications.

"According to all the analyses by various business service agencies, the post war period will be one for which certain definite planning must be made - NOW! The matter of reconversion from wartime to peace-time production in our factories; the mustering out of our armed forces of millions of men and women; the rehabilitation of casualties - all of these problems are staggering to the minds of intelligent people. At Morgan Memorial the problem of meeting emergencies is our principal occupation since we have been in the business of helping the handicapped and unemployed for nearly half a century.

Plans are already being made to use a building which has been given to us for a more intensive method of work-experience with the boys of the Charles Hayden Goodwill Inn and other handicaps. At this writing the machinery and set-up for a mattress factory have been completed as pictured above. Special training will be provided along the following lines: Mattress Making, Cabinet Work, Sign Painting, Auto Repair. This will not be 'trade learning' but rather 'work experience.' Thus many handicapped persons who will be coming to us will be in a better position to secure work on the outside. The emphasis, then, upon a work experience program is the obvious answer now for the problem of adjustment that will be upon us after the war. We ask your continued help. Your donations of discarded materials, provide self-respecting work and wages to those handicapped who seek our help in their time of distress."²⁰

In this article it is clear that the operating philosophy of Morgan Memorial was that work in and of itself was a

curative, rehabilitative measure. Moore was a businessman, and throughout his service at Morgan Memorial he remained that; did not appear to understand the changes that were taking place in the world of vocational rehabilitation. While competitive employment was and remains the ultimate goal of vocational rehabilitation, work experience or even sheltered employment was only a component of a process that was becoming more sophisticated.

Exactly one year later in The Goodwill the front page is dedicated to an article "Helping the Handicapped Find Their Way Back Into Industry"

"Is our task done?

The goals in our work with a handicapped person are first, to educate or train him to do a job he can do well in spite of his disability; secondly, to inspire him with a desire to resume his place alongside physically normal individuals in an environment from which he retreated; thirdly, to encourage him to assume responsibility for the improvement of his neighbor's environment as well as his own.

What can we offer him for training?

There are opportunities for both men and women in at least twenty different trades or skills. In addition, there are many tasks which do not require the attainment of any skill but help the individual to develop muscles which he believed were useless. In some instances, people do not need to learn a new trade but to learn new methods for an old trade - methods in which their handicap will not interfere....

The Job Ahead

With the return of men from overseas and the increased awareness of the need of the handicapped individual on the home front, the demand for a training center for those people will increase steadily, and Morgan Memorial is already planning to meet this demand. Through the gift of an additional building we now have space and are equipped to teach several additional trades, and as a result can employ more people than we have in the

past. Every attention will be paid to returned soldiers.

We are ready to cooperate with all agencies in the rehabilitation program. We welcome the opportunity to have them use our industries as a laboratory in order to determine the person's potential working ability as well as give him a chance to learn a trade, and hasten his return to industry."²¹

It is interesting to note the subtle changes of philosophy in the second year of Moore's Superintendency.

In the 1943 article he has taken the stand that work is the curative, that Morgan Memorial will not become a trade school but offer work experience. The 1944 article recognizes that there is more than work, and that adjustment to the work place and the community is likewise necessary. Further, he begins to note the value of vocational evaluation, job tryouts, or situational assessment as it is called today.

The genesis of these slight changes come from external and internal forces at work on the organization.

Externally, Oliver Friedman and Percy J. Trevethan teamed up to develop the consciousness of all Goodwills in relation to rehabilitation of handicapped persons at the 1943 Delegate Assembly by establishing a Committee on Rehabilitation. This likewise was driven by external forces including the newly formed National Rehabilitation Association and what was to become the National Association of Sheltered Workshops and Homebound Programs. Pressure was beginning to build on Goodwill to develop more of a social science approach to vocational rehabilitation.

Oliver Friedman was one committed to this as Fulton portrays him:

"The other thing that hurt Friedman's image actually should have enhanced it. He was deeply committed to the science of social welfare and sensed the need for Goodwills to become increasingly sophisticated and professional in helping the disabled. He was on the right track but considerably ahead of his time. Many Goodwill executives offered resistance to some of the changes Friedman insisted were necessary. For example, in a 'Bulletin' article in September Friedman wrote on 'The Future of Rehabilitation.' He declared:

The recent enactment of legislation by Congress for the rehabilitation of both soldiers and civilians, is one deserving immediate study followed by action in the near future. Trends of the times indicate that the time when important decisions must be made will be reached within a year or two, maybe sooner....

Goodwill Industries can take the lead in the field of human rehabilitation and by their accomplishments build and maintain the prestige that goes with a leader. Or... they have an alternative of withdrawing and offering work to persons with less apparent handicaps....

No private organization or agency can equal the potential service of Goodwill Industries. Without question, the already vast network of Goodwill ... in 89 American cities stands out as a major factor in human rehabilitation....

Only one other organization at the present time can surpass the scope of Goodwill Industries potentialities. That organization is the Federal Government."²²

Fulton continues by pointing out that the National Committee on Sheltered Workshops was about to publish standards of operation which could not be met by many Goodwills. Friedman in his year end 'Bulletin' editorial urged Goodwills to institute "rapid changes, better methods, and replace older policies" so that they might meet the new standards for excellence in sheltered work-shops.

Closer to home, external pressures were mounting on Moore and Morgan Memorial for change.

" Late in 1944 a report reached Friedman's desk. It would have infuriated his predecessor and, in part, justifiably so. However, it tended to confirm a growing awareness in Goodwill Industries that Morgan Memorial was no longer the unexcelled, uncriticized, incomparable operation that it once had been.

The Greater Boston Council of Social Agencies had done a special critical study of the work of Morgan Memorial now that Edgar J. Helms was no longer around to tell social workers where they could go. The Boston Council did not mince words. It concluded that some modernization and upgrading was needed, that the Morgan facilities were run-down, the housekeeping inadequate, the management 'in-grown', the lack of professional specialists apparent, the emphasis on religion too obvious. To each charge, Fred Moore and his supervisor, P.J. Trevethan, patiently replied. Some charges were easily discounted or refuted. Many were acknowledged as valid. Changes were promised where changes could be made and seemed warranted. But little corrective effort would be undertaken until the emergency was over.

The Council of Social Agencies suggested that Boston's Goodwill had grown in too many directions, that it was hard to pull the complex Helms had built into focus. In reply, Morgan Memorial only reminded the social workers that Goodwill had been doing a lot of things for a great many people in Boston for a good many years.

They would agree to change the name of the Childrens' Settlement to the Youth Center but would not take the chapel and Sunday school out of it. They convincingly rejected criticism and recommendations on how to reorganize and run the Charles Hayden Goodwill Inn for Boys because Morgan Memorial had a brilliant track record for working with wayward lads that no group of social workers could match. They appreciated complaints about the housekeeping but noted that a part of the problem was proximity to railroad tracks, smoke, and other pollution from the city environs in which they were located.

Agreed upon, however, was the need for new blood in the organization. Perhaps some new people could be brought into both the board and staff. The Council of Social Agencies hinted they thought this was the

most glaring deficiency. The personnel and policies were left from a bygone age - that of founder Helms. Moore may have winced at this, but his replies admitted, reluctantly, the point was well made. Change - even for Morgan Memorial - was inevitable"²³

The internal pressure to professionalize had its roots in the Youth Guidance Clinic which was begun at the Charles Hayden Goodwill Inn under the leadership of Dr. Emil M. Hartl its director. Hartl in his doctoral studies became very interested in Constitutional Psychology. He became very close to Dr. William Sheldon of Harvard who was the leading proponent of that school of thought. Together, they initiated the Youth Guidance Clinic at the Inn in 1939.

"The Youth Guidance clinic was opened at Hayden in November 1939. Sheldon came from Harvard on Thursdays to interview the boys those evenings and Friday morning Clinical case conferences were held to assess each boy's predicament and to recommend plans for the boy's future....

Elderkin recalls: 'There were productive sessions. Not only did we have Sheldon's own integrative appraisal, based on physical examinations, agency reports, hospital and other records, and a medical photograph to determine physical build, but also the observation and experiences of the Hayden Inn staff and agency worker which were incorporated in the planning of each boy's program....'

This new emphasis on individualizing a program for each boy at the Hayden Goodwill Inn, initiated by Sheldon and developed by Hartl, was influential in conceptualizing and establishing rehabilitation programs at the Harry K. Noyes Rehabilitation Center (see below) and Morgan Memorial Goodwill Industries. Every client is viewed as an individual, and a staff team creates an individual service plan for him. At Hayden this became a fundamental part of the plans for the boys' education and growth.

At this juncture the Hayden Goodwill Inn dramatically shifted from a transient and short term home to a clinically oriented, diagnostic and treatment center. As World War II lingered, the

ages of the boys referred continued to decline in years. Those younger boys, tended not to leave the Inn until they had completed the individualized program set up for them. They were then mainstreamed in an appropriate way."²⁴

While Moore was well aware of these pressures, his response was to direct Dr. Emil Hartl to create a "Work Experience Manual", a highly detailed syllabus of twelve departments available to "inexperienced and handicapped persons."

According to Hartl, "Moore came back from Milwaukee in 1944 determined to do something with the Industries. He directed me to meet with every supervisor in the plant and to detail how each operation would be done (taught) and in what time."

The undertaking took nearly two years from its inception to completion. Yet, despite the pressures to professionalize its programs, Morgan Memorial resisted steadfastly, preferring instead to curricularize that which it was already doing in the Industries. Moore's preface to the publication shows his intent,

"The Morgan Memorial is a multifunction agency. It seems well to present the aims and methods of one phase of its industrial activity, namely, the Morgan Memorial Work-Experience program, in this manual, It will be of interest particularly to persons concerned with providing opportunity for individuals to 'learn-by-doing.'....
Individuals are able to acquire skill in particular tasks which enable them to enter outside industrial and business enterprises where jobs are held on a competitive basis...."²⁵

The general information section of the Manual is most illustrative of the Moore bind. The first item addresses program tailoring to individual differences, clearly a Sheldon-Hartl influence.

"...4. The expression 'Industrial Therapy' is currently regarded by the National Office of the Goodwill Industries as suggesting the essence of the purpose of Goodwill program. The Work-Experience feature of the Morgan Memorial Goodwill Industries is merely one of five aspects of employment opportunities interested in this general purpose. The five aspects are: Work-Relief, Sheltered Employment, Work-Experience Program, Rehabilitation with training, Carrying Organization Employment (Production personnel, staff, trainees for 'Goodwill Work.')

...6. Partial financial support of an individual's Work- Experience program is expected - if after an initial period had transpired and the individual has become productive, the contribution may be reduced or omitted, providing the person carries his own load by output or his classification has been changed...."²⁶

Although Moore believed that this project was the solution to his program problems, it was of little real value immediately since there were very few individuals or organizations interested in purchasing "work experience" services from Morgan Memorial. The development of the individualized service plans called for in 1935 and again in 1943 were paid but token attention by Moore. The only segment of the organization using that method was the Hayden School.

Those Goodwills, most notably Chicago, Detroit and Kansas City which had heeded Friedman's call to professionalism quickly developed strong rehabilitation programs by the end of

World War II. Boston, along with a majority of Goodwills simply tried to repackage what it had always done and present it as its rehabilitation program. The advice offered by the Boston Council of Social Service Agencies was also unheeded. Morgan Memorial had lost an excellent opportunity to position itself as a leader in the field of rehabilitation as it had been a leader in social services. From the period when Moore took charge of the organization in 1942 until his retirement in 1953 there appeared to be little planning, less innovation, and a declining level of community support. The 1949 doctoral dissertation of Charles Wesley Fisher, Ph.D. "The Development of Morgan Memorial as a Social Institution" concludes in Chapter VII with what can be described as a strategic plan for the organization. It includes the following subheadings:

Dynamic Concepts and Their Objective Form

Trends and Problems in the Development of

Morgan Memorial

Cumulative Effect of Morgan Memorial

Areas for Further Investigation and Study

Within the exhaustive and complete document prepared for Morgan Memorial was a blue print for development of its human services. There is no evidence to ascertain why Fisher's work was not immediately seized by Moore to be used as part of a planning process. For five years, Morgan Memorial had been under pressure from Goodwill Industries of America, Social

Work Council, and in the 40's from the Boston Community Fund.

The latter pressure was expressed in declining funding allocations with Morgan Memorial considering leaving the Community Fund as noted by Fisher, "within the next six months."²⁷

Fisher's major contribution to Morgan Memorial was a call to integration of social service aspects of the organization,

" With the increase in size and function of the institution, a danger against which Lindeman warns, that of internal specialization, becomes greater in Morgan Memorial. Each department, specializing in its own form of social service, would function as an independent unit despite the fact that administrative power and financial control is centralized in the hands of one executive and his assistants and the board of directors.

... to help them realize their greatest potentialities. In order to do this, Morgan Memorial has devised departments which will serve persons and their needs on levels according to their problems. When the departments cooperatively set about to help an individual, each department may be able to make a contribution."²⁸

In the late forties, the two major components of Morgan Memorial's modern human services programs were brought to the fore: The provision of comprehensive, multidiscipline, casemanaged services, and the integration of these services throughout the organization.

Why these concepts were not further developed at this time could only lead to endless speculation. At the end of Frederick C. Moore's service to Morgan Memorial, the pressures for change were resisted, and the organization was operated as

Edgar Helms had left it, just a decade older, a little more run down, and a little poorer as public support waned.

Frederick C. Moore passed on June 12, 1959 after giving fifty-seven years of dedicated and loyal service to Morgan Memorial.

Rev. Henry E. Helms 1953 - 1980

Born on August 3, 1915, Henry Eighmy Helms was the ninth of twelve children of Grace and Edgar James Helms. While Henry was raised and educated in the Watertown, Massachusetts schools, his education was enriched by the many international dignitaries, clergy, and social service persons who were frequent dinner guests of the Helms family.

Henry recalls,

" Dinner each evening was an event. With so many children to feed, and always a guest or two from somewhere in the world, dinner conversations were always spirited and educational. Pop was always bringing someone home with him.

If it were not some dignitary, then Mary Fagan or Kate Hobart would join us. There was always room for an extra place setting, and Mom, Grace, could always 'water the soup.' The table extended from here to there."²⁹

While Henry has warm recollections of his early years, his father gives us a glimpse into the Helms' life,

" Every child that has been born to us has been regarded as a gift from God and welcomed with loving gratitude. We have always had enough to sufficiently clothe, feed and educate our children, pay our bills as they become due, pay a tithe of our income to the church and make special offerings beside....

Yes, this has meant simple living. Clothes for older ones have been made unrecognizable for the younger ones....

What we have foregone in the way of entertainments and finery we have been more than recompensed for in the fellowship and comradeship of our home...."³⁰

It may be assumed that Henry's youth was spent in a modest, deeply religious Methodist home where concerns for one's fellow man were not just spoken but became deeds, took reality in the evening's dinner guests and subsequent parlor conversation.

A significant part of Henry's value formation and education was literally at the hand of Edgar Helms. When questioned about his relationship with his father, Henry sees his father as "Bigger than Life". In many respects, one might assume that, like much of the world, Henry was deeply impressed with his father and his work. There was however a lighter side of Edgar as reported by Henry, "Pop was enamored of Ghandi, and from time to time he would go to the top floor of the house and put on a sheet and declare, 'I am Mahatma Ghandi', then launch on a Ghandi discourse."³¹

After completing his undergraduate degree in Liberal Arts at Boston University in 1937, Henry entered the School of Theology where he distinguished himself as the Lucinda Beebe Scholar, earning a fellowship which would permit him to travel to Europe to study cooperative ventures with his father. He earned his graduate degree from the School of Theology in

1940, and continued his education at Harvard where he completed nearly all work on his terminal degree.

While Henry asserts that he was "born in a Goodwill bag", his actual career began with Morgan Memorial at twelve years old working in the Camp Commissary. He continued to work at the Camp each season in a series of different posts. In 1937 he was named Pastor of the South Athol Methodist Church, later named Director of the South Athol Fresh Air Camps and Plantation and Industries which he held for five years until he was appointed Pastor of the Church of All Nations in 1942. He worked at this until 1948 when he was appointed Assistant Superintendent of Morgan Memorial Goodwill Industries under F.C. Moore. In actuality, this appointment was to take over the organization's activities, relieving Mr. Moore of the day to day responsibilities of operations.

At the Board of Directors meeting, the Annual Meeting of the Corporation in 1953, there were two decisions made that profoundly effected the life of Henry E. Helms. The Board of Directors elected him to become Executive Secretary (Current title, President and CEO), succeeding Frederick C. Moore, and the Board also voted to drop out of the Community Fund because of declining fund distributions and increased agency financial needs. According to Helms, "they were contributing \$79,000 to Morgan Memorial and the need was closer to \$200,000 per year."³²

Henry Helms then continued relating that there was a tremendous need for cash by Morgan Memorial and he selected 25,000 names from the Boston telephone directory and wrote to them all. He stated that his first mail appeal resulted in a very low one percent return; however, he was undaunted because he used that return as the basis for his next mailing to homes. Over the years, this activity, placed into the hands of a succession of mail appeal professionals has resulted in nearly 50,000 ongoing donors who provide Morgan Memorial with nearly one million dollars annually with which to subsidize its operations such as the Fresh Air Camps, Elderly Feeding Program, Holiday Special Events and the Chaplaincy Program. If Henry E. Helms did nothing else, he provided a base of public support which permits the organization to undertake many "losing propositions" today in human services. In addition to the annual giving, he established an excellent program which results today in no less than \$300,000 being generated in wills and bequests annually. He attributes his success in this area to "talking to any group that would have me." The legacy program he attributes to never publishing anything without the statement, "A good will includes Goodwill!" He assiduously engaged in large donor cultivation.

The immediate years following his appointment to the position of Executive Secretary of Morgan Memorial were spent in recovery. attempting to rebuild the solid fiscal and operational agency that he knew. There were no new program

developments until the "War on Poverty" ushered in youth activity programs.

Hartl, as previously stated, had developed a taxonomy for each department of Morgan Memorial Goodwill Industries under the direction of F.C. Moore. This curriculum was analyzed by Hartl, and components were incorporated into his training program for boys at the Noyes building. This was composed of samples of actual work performed in the Industries. In addition a mattress manufacturing operation was begun in the Noyes Building, 927 Washington Street Boston.

"...Dr. J. Edwin Lacount redesigned the building and established a modern facility for rehabilitation and training at a later date. By 1956, a rehabilitation program was once again underway.

Hartl remembers Lacount well. The latter had run his father's mattress factory in Boston as a young man before his career in the Methodist ministry. After retiring from the ministry, he came to work at the Hayden Goodwill Inn and the Morgan Memorial Church of All Nations, hosting its early morning radio program. With his interest in vocational training and experience both in business and at Morgan Memorial, Lacount was largely responsible for renovating this former chocolate factory into what later became a vocational rehabilitation center. He also became its first director....

By the fifties, these were the industrial and work experience areas available to the boys: Furniture repair --refurbishing, reconstruction, upholstering; furniture repair and refinishing; Cabinet-making; Painting wood -- including enameling, varnishing/shellacking, polishing; Spray painting; Electrical appliance repair; Textile refinishing and cleaning -- including doll repair; Light mechanics - including wheel toys, caning, tennis racket restringing, buffing and repairing metal and glassware, sporting articles and baggage, clock and watch repair; Printing; Sorting books, pictures music, magazines and pamphlets; Commercial assembly - piece rated work; Mattress making; Sewing mattress covers; Auto mechanics;

Shoe repair; Elevator operation -- freight and passenger; and Retail sales. All these training grounds were also available and utilized at the Goodwill Industries building."³³

This industrial program was coupled with the comprehensive psychosocial approach which Hartl and Sheldon had created in the forties, resulting in the model for facility based comprehensive vocational rehabilitation which was to evolve in a few years.

Concurrent with this development at Morgan Memorial was growing national pressures from the National Rehabilitation Association and the National Association of Sheltered Workshops and Homebound Programs to professionalize the practice of rehabilitation in workshops such as Morgan Memorial. Oliver Friedman had made this call as national Executive Secretary of Goodwill Industries of America, frequently and was eventually forced to leave the national leadership position. He was followed by Percy J. Trevethan, formerly an assistant to Moore and Henry Helms in Boston. He similarly echoed Friedman's call for professionalization of programs.

"Concurrently the Goodwill Industries of America (headquarters in Washington, D.C.) -- the national level was involved in defining and propagating a 'newer role for its workshops in the rising field of rehabilitation. Institutes for training executives and administrative personnel, lobbying for new legislation, and the securing of demonstration and research projects were some of the early activities of the national staff -- the national boards and Council of Executives. This press forward was definitely operating in the Massachusetts and Boston area. Reactivation of the Noyes Rehabilitation Center and the enrichment,

expansion and adjustment of Goodwill Industries workshops in a fashion relevant to community need was a natural outcome of these national activities."³⁴

"In 1958 and 1959, in Boston there was an attempt to engage major community agencies in health, welfare and rehabilitation, together with private enterprise(business and industry), in coordinated community planning to establish a 'Cooperative Work Conditioning Center.' The initiative came from those intimately acquainted with the awakened interests in rehabilitation which had resulted in the establishment of the New England Medical Center complex of Boston, through the use of federal funds....

Morgan Memorial was one of the participants.... By November, 1959, a special meeting was called of the members and trustees (quorum present) at which time the difficult state of affairs was described. The benefactor chairman had resigned due to illness; finances were exhausted;...the executive director resigned; and the President resigned as soon as a replacement could be elected. The CWCC was at a 'crossroads.' The President's closing words in his written report were: 'I am persuaded this area (Boston and New England) needs an agency such as the Cooperative Work Conditioning Center. I am equally persuaded it can have it. I hope this valuable proposal will not be lost in a sea of talk....'

At the same time as the CWCC effort was ending, a pilot effort was being initiated at the Noyes Rehabilitation Center of Morgan Memorial, through the combined efforts of the Division of the Blind, Commonwealth of Massachusetts, and Morgan Memorial. The conviction that a workshop-centered program for constructive rehabilitation for the blind (evaluation, work conditioning and personal adjustment training) was central in the outlook of the Director of the Massachusetts Division of the Blind, who incidentally was also a participating member of the Cooperative Work Conditioning Center. However, it was not evident that the CWCC program would readily or soon undertake to incorporate the blind in any proportions commensurate with the need. Coincidentally, with the stirrings of interest in accelerating the rehabilitation process at the Division of the Blind and at Morgan Memorial, the staff psychologist was doing work for both agencies.. The communication between two agencies, thus facilitated, resulted through

negotiation in the establishment of a pilot program called the Harry K. Noyes Work Diagnostic and Occupational Training Center. An important feature was that the blind were to be served along with sighted clients. The basic patterns of the work evaluation unit, the psychosocial approach of reporting procedures, were worked out jointly and became eventually, after two years of development, the basis for an expanded service program for the New England region under a demonstration and research grant from the Office of Vocational Rehabilitation (now Vocational Rehabilitation Administration [VRA]). This pilot effort was launched during the time of the maximum effort to establish the Cooperative Work Conditioning Center and was described as having a limited objective (work with the blind and not based on subcontracted jobs but rather on job samples from industry and the regular Goodwill Industries operations as found useful). Subsequent to the dissolution of the maximum effort in behalf of the Cooperative Work Conditioning Center, the Noyes Program became the basis for an application to the Vocational Rehabilitation Administration of the Department of Health, Education, and Welfare for a substantial grant to establish the New England Rehabilitation-For-Work Center of Morgan Memorial."³⁵

Alpert reports the founding of the New England Rehabilitation - For - Work Center similarly, based on her interviews with Hartl in 1982.

"... By 1959 a cooperative effort was underway to establish a "Cooperative Work Conditioning Center" in Boston. Morgan Memorial was one of the cooperating agencies. Through a series of unfortunate circumstances, the effort fell apart. However, at the same time, a pilot project had just started at the Noyes Rehabilitation Center of Morgan Memorial through combined efforts with the Massachusetts Division of the Blind (now Massachusetts Commission for the Blind). A work evaluation and personal adjustment training program had been set up for a variety of clients, including residents of the Hayden Goodwill Inn and others at the Noyes Center. At this time, Hartl became the coordinator of the program which was now called the Harry K. Noyes Work-diagnostic and Occupational Training Center. The blind as well as sighted clients would be served. Here were the beginnings

of the vocational rehabilitation programs for the handicapped and disabled at Morgan Memorial Goodwill Industries today.

After two years of development, this pilot project also provided the basis for an expanded service program for the New England region, through an application to the Vocational Rehabilitation Administration of the U.S. Department of Health, Education and Welfare, now Health and Human Services.

Morgan Memorial's Executive Director Henry E. Helms (son of Dr. Edgar J. Helms) launched a proposal, Special Project RD-610, with Hartl's assistance, for the federal government to fund (through state agencies) the programs at the Noyes Center as a regional rehabilitation facility, providing comprehensive evaluation of the handicapped and expanding the programs already in place. Helms and Hartl personally visited the directors of the respective statewide rehabilitation agencies in each of the New England states to gain their support for Morgan Memorial's program and to ensure their utilization of it. Helms, Hartl, and Stephen Toma (Morgan Memorial's Consulting Psychologist) succeeded in obtaining the federal-state (#610) grant with the help of the regional Director for rehabilitation of HEW (C. Ryrie Koch and his associate Eleanor Smith) and especially the Massachusetts Rehabilitation Commission and the Massachusetts Division of the Blind. The New England Rehabilitation-For-Work Center of Morgan Memorial was, thus, established in 1960."³⁶

Personal interviews conducted with Hartl during May to August 1988 relate the same pattern of development for the New England Rehabilitation-For-Work Center with, however, a higher degree of planning than is readily evident in the above descriptions. Hartl relates that the concept for the Center was originally his and Toma's (Stephen Toma, Ph.D. Consulting Psychologist for Morgan Memorial, The Massachusetts Commission for the Blind, and Veterans' Administration); however, Hartl spent considerable time in developing his concept with leaders in the rehabilitation community of Boston at that time.

Initially as colleagues, and later as consultants to the program, Hartl and Toma worked with Julian Meyers, Ph.D., Director of Boston University's Rehabilitation Counseling Program, Rubin Margolin, Ph.D. of Northeastern University, Mr. Gerald Cubelli, Harvard School of Public Health, Mr. Louis Tracey, Director of Case Services for the Massachusetts Department of Vocational Rehabilitation, Mr. Fred Greehan and Mr. Robert Scott of the Massachusetts Division of the Blind. These were associations which Hartl had made through his activity with the Massachusetts Chapter of the National Rehabilitation Association. This was in fact the planning group with whom Hartl and Toma met to crystallize support for the concept of a comprehensive client centered vocational rehabilitation center.

The consensus of support, built on the credibility of both Hartl and Toma, facilitated development of the project. This coupled with positively perceived experience in the Harry K. Noyes Work-Diagnostic and Occupational Training Center by the Division of the Blind enhanced the possibility of the RD-610 grant being made. A. Ryrie Koch, the then New England Regional Director of the federal office of the Vocational Rehabilitation Administration gave conditional support to the project, providing that there was an expressed need by the state agency directors of New England. This condition brought Helms and Hartl into the office of each state director, and ultimately won their support for the project.

While there is little hard evidence of planning for the project, it in fact took place at a number of levels within Morgan Memorial, in the adjacent Boston community, and throughout New England. Determination of services to be rendered, staffing, and fiscal considerations were all worked out in advance of the project application.

In June of 1960 the Center came into existence with the grant and the hiring of its first Director, William F. Stearns, Ph.D.

The Final Report of RD-610 reveals a slow start-up as might be expected, but with services being provided to 71 persons by november of 1961. In 1962, 87 persons were served; '63,72; '64,74. There are reported 304 persons served over the life of the project's initial grant. Project activities were continued because of the fee for services agreements reached during the planning process, and because there was additional support for a limited number of project staff on the newly developed Project #1576, Rehabilitation for the Deaf.

In his discussion with Alpert, Hartl relates,

" During the early Sixties, agencies throughout New England made referrals of handicapped men and women to the New England Rehabilitation-For-Work Center for work evaluation, personal adjustment training, skills, and job placement. In the first 42 months, 255 multiple-handicapped persons from six New England states wer enrolled. Hartl said that some of the personnel in these agencies initially did not have faith that Morgan Memorial could provide a professionalized, comprehensive vocational rehabilitation program, but they referred clients, nevertheless.

'We were already functioning in rehabilitation,' Hartl said. 'We had a long history and just needed a shot in the arm from the state/federal grant. The early program at Morgan Memorial wasn't as structured and time tested as it is now (1982), but it was always comprehensive. Now we have much tighter assessments, documentation, and recommendation process for the clients, based on the work of a team of professionally competent staff.'"³⁷

While there was support from Goodwill Industries of America, the federal Office of Vocational Rehabilitation, and respected members of the rehabilitation community of Boston, nationally, outside of the Goodwill movement, there were those who believed that Goodwill was not an appropriate placement for persons who were disabled. This is in evidence as Obermann points out in his work:

"The Goodwill idea, which is also used by the Salvation Army and Society of Saint Vincent de Paul, is not entirely free of criticism. Many persons in the rehabilitation movement object to basing a whole scheme of vocational rehabilitation on salvaging castoff junk. They feel that it does violence to the self-respect of the beneficiaries of the system, and it misleads materials contributors into believing that they have discharged their obligations to the disadvantaged in their communities without the effort costing anything.

Goodwill defenders explain that the salvage and work plan has the great virtue of being feasible. The materials are available. When renovated and repaired they are desirable and saleable. The renovating and repairing and marketing involve work that disabled and handicapped workers can do. Working while achieving vocational rehabilitation, regardless of the nature of the materials worked with, cannot be more debilitating to the self-esteem of the individual than accepting outright charity or relief."³⁸

Obermann's negative position was one shared by many referring persons in the rehabilitation community. While

there was support from the leadership community in vocational rehabilitation, there was another force to overcome in the characterization of contributed goods as "junk," and the use of referred clients as workers in that "junk."

The New England Rehabilitation-For-Work Center was established bringing together the disciplines of medicine, nursing, psychiatry, psychology, rehabilitation counseling, vocational assessment and occupational education. In the Hartl plan of the Forties, this was the ideal. It was to take final form in 1960 under his guidance as Coordinator of Rehabilitation Services for Morgan Memorial. The directorship of the program went to William Stearns, Ph.D., followed in 1965 by Gordon B. Connor, Ed.D. The model of tightly coordinated, casemanaged, and comprehensive services prevails to today.

Physical Facilities Crisis of the Sixties

Early in the 1960's the Massachusetts Turnpike Authority announced its intent to link its terminus at Route 128 in Weston with the Central Artery in Boston. That decision had a devastating effect on the overall human service efforts of Morgan Memorial. In very rapid succession all buildings of Morgan Memorial were taken and razed to make way for the Turnpike. The Church of All Nations was destroyed as was the Seavey Settlement House, Day Nursery, the Goodwill Industries

factory and warehouse as well as a number of tenements in which some long term Morgan Memorial employees resided.

In 1963 the Industries relocated to "temporary quarters at 95 Berkeley Street" in the former plumbing supply warehouse of the Decatur Hopkins Company. This building housed the entire contributed goods program of Morgan Memorial and its "main" store.

A warehouse at 140 Dover Street was acquired at the same time, permitting dead storage, and the use of 95 Berkeley Street for processing and sale of donations. Headquarters offices were established on the fourth floor of this six story building.

Very sparse renovations were made because the settlement received by Morgan Memorial for the property taken would only cover the replacement of the Industries and the Hayden School building. It was anticipated that action could be brought against the Commonwealth and the Turnpike Authority to secure a settlement adequate to replace all lost structures. This proved to be untrue, and the difficult decisions were made by Helms and the Board of Directors to save the Industries and Hayden Goodwill Inn School. The work with children was to be postponed for several years, and the settlement house was never to be reopened. The Eliza Henry Home was converted to a residence for clients in the newly established New England Rehabilitation-For-Work Center.

Thus was born the current program of human services of Morgan Memorial. Sixty years of work to develop a major physical plant to provide service to the community around it was erased by a decision to extend the Massachusetts Turnpike. This was an eventuality for which there could be no real prior planning, and from which there was no real recourse. Morgan Memorial waged all of the appropriate legal battles, but was defeated time and again in the courts. As a not-for-profit, tax exempt organization, its real property was severely undervalued, and underpaid for by the Commonwealth. The mid-sixties were a time of reassessment of its priorities at Morgan Memorial.

A major support for the continuation of the New England Rehabilitation-For-Work Center came in the form of individuals in the community.

"The readiness of local professional and business persons to serve as volunteer consultants. The following names must be mentioned as being of special influence in the early stages of this development: Mr. W. Scott Allen, Liberty Mutual Insurance Co.; Henry J. Bakst, M.D., Chief, Industrial Rehabilitation Department, Massachusetts Memorial Hospitals; Gerald E. Cubelli, M.S., Instructor in Rehabilitation, School of Public Health, Harvard University; Mr. Fred Greehan, Mass Division of the Blind; Mr. Edward F. Medley, Employment Service Advisor, U.S. Bureau of Employment Security; Julian S. Myers, Ph.D., Boston University Rehabilitation Counseling; Mr. Louis M. Tracy, Mass Rehabilitation Commission."³⁹

With all of the problems of physical facilities, it would have been most easy for Henry E. Helms and the board of directors of Morgan Memorial at this point to simply back away

from any commitment for program at the conclusion of RD-610 and Project 1576. Chapter V will detail the aftermath of this problem period. Were it not for the committment of Helms and the support of Hartl, and the steadfastness of the professionals listed in the above paragraph, virtually all human services could have been lost with the physical plant of Morgan Memorial Goodwill Industries, Inc.

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V MODERN PROGRAMS AND THEIR DEVELOPMENT 1966 TO 1989

Much of this chapter will involve first hand observation of events, first as a student intern and then for the next twenty-two years an employee of the organization, in varying capacities.

It is useful to note that this writer was a member of the Administrative Staff of Morgan Memorial from 1967 to 1970, and of the Executive Staff from 1970 to 1986, and the Chief Operating Officer of the Corporation from 1986 to 1989. As Administrative Staff information on executive decisions was related by a member of executive staff. As an Executive Staff member, there was direct participation in all decisions of the organization for the entire period under discussion here. Where available, documentation of actions and decisions will be presented.

Status of the Organization 1963 To 1966

As stated at the end of the previous chapter, it would have been convenient, and apparently "Good Business" to terminate the Hayden School and vocational rehabilitation programs at the end of the period of Projects RD-610 and 1576. The Children's Settlement had already been razed, the Day Nursery, now vacated was next, Hayden School, the Eliza Henry

Home and the Seavey Buildings were scheduled for demolition in the near future. The Noyes Building would not be far behind. Funds available from the real estate takings amounted to \$3,000,000, barely enough to get the Industries into temporary quarters, renovate it, and begin work on another program segment, or bank the surplus to prepare for the permanent quarters of the "New Goodwill Industries". Henry Helms was convinced that the community would support a major capital fund drive to replace much of what had been taken by the Turnpike Authority, and launched his 21st Century Fund Drive. Elaborate architectural renderings were drawn for the expansion of the temporary 95 Berkeley Street Building over the Turnpike using air rights. There was to be a Rehabilitation Tower on the building which would house the Noyes (RD-610) program, residential units replacing the Seavey and Henry buildings capacities. In short the Temporary Goodwill at 95 Berkeley Street was to replace major portions of the facilities lost on Shawmut Avenue and Corning Streets. Day care was incorporated as part of the architectural planning for this facility. This renovated and expanded facility, planned in 1963 to be temporary quarters was to become the permanent site of all Morgan Memorial activities by 1966. The principal reason driving this decision was that Morgan Memorial was a "South End" agency. It would remain in the South End (inner city designation), as opposed to some

Goodwills that had chosen to "abandon the inner city for more suburban locations".¹

While this is purely conjectural, it is this writer's belief that the will of Henry Helms prevailed upon the Board of Directors of Morgan Memorial, persuading them that the history of the organization demonstrated that proximity to its service population was a key to the success of Morgan Memorial Goodwill Industries in the past, and would be a pivotal element in future developments.

This assumption, and the failure of the 21st Century Fund Drive were to have significant negative impact on Morgan Memorial for a number of years. Significant and negative because the temporary quarters secured on Berkeley Street in the South End, just a few blocks from the site of the beginnings of the agency, were inadequate to perform expected operations efficiently. The first floor was planned as a retail outlet with the basement providing a furniture, book and bargain store. The rear area of the first floor contained eight loading docks and two freight elevators which were used to move material through the upper floors. Second and third floors were given to textile processing and finishing with most of the third floor given to sorting textiles. The fourth floor contained executive and administrative offices, cafeteria, chapel, and reception area. The fifth floor was dedicated to household goods, radio/television repair, a

printing shop, and a shoe repair department. The sixth floor was set aside for furniture repairing and remanufacturing.

Mr. Norman Barres, currently Executive Director of Goodwill Industries of Bridgeport, Connecticut, was responsible for the layout and material flow in this building, assisted by members of the Northeastern University Mechanical Engineering Department, personnel from Goodwill Industries of America, and local engineering talent (some volunteer, some paid). In retrospect Mr. Barres admits that the building presented problems which were most difficult to overcome in a cost effective manner. However, as the Director of Operations, this was what he had to work with. Further, the "old building" was also multistoried, and if it (the process) worked there, it could work at Berkeley Street.²

On the Northshore, in the City of Lynn, Morgan Memorial had a branch operation, a collecting, processing plant which supplied stores in Lynn, Salem, Peabody, Chelsea and at times Beverly and East Boston, Massachusetts. From time to time disabled individuals would be referred there for "evaluation" and "training" following a small equipment grant in 1957 to the facility on Oxford Street in Lynn. This was for all purposes a miniature, self-sustaining Goodwill Industries, established by Mr. A. Howard in 1934 as a branch store, and brought into full maturity by Mr. Arlington W. Crossman. In the early sixties, this operation was contributing its surplus revenues to Morgan Memorial.

In the Worcester area, the old Brockleman's Market became available to Morgan Memorial on most favorable terms - partially purchased, and a partial donation from the Stop and Shop Company. It began operation as a branch facility in 1964 under the leadership of Mr. Joseph Fuller.

As 1966 opened, all three locations, Boston, Lynn and Worcester were sheltered workshops, offering to provide employment to handicapped persons in the preparation of contributed goods for resale. The only areas in which year round professional services were being provided were the Charles Hayden Goodwill Inn School which was slated to be demolished, and at the Harry K. Noyes, New England Rehabilitation-For-Work Center, which was to meet its fate in 1968 to make way for the Josiah Quincy School. The Fresh Air Camps were used during the summer months to provide "food, fun, and fresh air" to about 400 youngsters. The industrial and agricultural enterprises there having been abandoned for some twenty years.

Cash in the organization was very tight with accounts payable continuing to increase. The current fund balance on December 31, 1967 was reported as a deficit of (\$809,559.35).³ The nearly seventy-five Boston truck drivers and helpers had sought and won Teamster representation, Local 82, so that an unprecedented dynamic was introduced to this situation, collective bargaining and subsequent wage and benefit increases which contributed to a worsening financial picture.

The decision was made by the Board of Directors to retain the Hayden School, and in 1966, the former Rabbinical Seminary at 21 Queen Street in Dorchester was purchased. This exhausted the settlement monies from the Turnpike taking and renovations needed to convert the new Hayden building into a residential, treatment and educational facility were not readily available. A construction mortgage for nearly \$900,000 was secured, pledging endowment funds and the building as collateral. The funds were to be part of the Capital Fund Drive, the 21st Century Fund. This was the first departure from Edgar's dictum, "We pay as we go, or we don't go."

In 1968, the Hayden School moved to its new facility after Thanksgiving, after spending an "extended summer" at Hayden Village in So. Athol. The construction mortgage became due and payable.

Compounding the financial picture was a change of fiscal leadership in the mid-sixties, with a new controller coming on board in 1966, Mr. A. Ramsey Gifford. While he possessed outstanding technical skills, he lacked the ability to meaningfully translate the deteriorating finances into corrective action plans. Each department of the organization had developed its own bookkeeping system which showed each as a profit center, yet the organization continued to build its deficit because its management and general expenses were covered by no department. Each had learned to argue success-

fully for its own turf, usually forecasting doom of one form or another as a consequence of being required to cover its share of overhead expenses.

At this point in the development of Morgan Memorial, there were annual "planning conferences" or retreats. The agenda at these usually consisted of some specific training sessions, some group dynamics sessions which seemed to have a "feel good about yourself" orientation, and some attempts at short range planning.

For the most part that which was done was less than might be expected from an annual operating plan upon which to base a single year's forecast. There was little strategic assessment as we know it today, and very limited sharing of the "vision of the organization". Attempts at interdepartmental cooperation frequently resulted in very heated exchanges which resolved nothing but contributed to the internecine warfare and protection of turf.

The situation in the mid-sixties was a classic case study of an organization bound to fail, bent on expansion, and living beyond its means.

On the positive side of the organization, Henry Helms had long seen the value of excellent public relations. He had developed an outstanding program which included a speakers bureau, weekly press releases, an antique fashion show which was totally volunteer operated and appeared two to three times

per week to tell the story of Goodwill, organized school drives in many communities for the collection of donated goods, continued the publication, "The Goodwill" which was to become "The Goodwill News", and invited tours of the organization by all kinds of groups. His efforts were well rewarded in a fund raising program that could be counted upon annually to raise 15% of the annual operating budget. Additionally, this program set the stage for planned giving activities which have resulted in Morgan Memorial receiving, even today, in excess of \$300,000 annually⁴ in bequests at a minimum, and frequently more.

In addition to the public relations emphasis, Helms with the assistance of Norman Barres, developed the "collection box" concept. This was to replace the "district visitor" whose function in Edgar's day was to visit a family and place a donation bag with them. These collection boxes were placed in publicly accessible parking lots, such as supermarkets throughout eastern Massachusetts. At its height, there were 641⁵ such collection centers. The original box changed over the years, as did its method of handling material. It is raised as an item here because the collection box became a major focus of agency research, development and planning. It is illustrative of the micro-planning that was encouraged and fostered in the organization. Each segment, department of the organization became its own "skunkworks" in Naisbitt terms,

without an overarching or binding concept of the central purpose of the organization, MISSION.

As it is conceived today, mission statements are central to the core of planning, and are developed and modified as a result of planning. The apparent dichotomies of thought which indicate the need for planning are evident in the same document published by Morgan Memorial as the Final Report of Project RD-610.

When its discussion of "The Impact of the Center on Its Surroundings, A. The Center and the Parent Agency -" and its concluding chapter which contains the section "IV. The Institutional Setting of a Rehabilitation-For-Work Center are compared, this need becomes very apparent.

The report itself was written at a time when the New England Rehabilitation-For-Work Center was at best tenuous in its existence. The founding Director, William F. Stearns, Ph.D. was about to leave, to be replaced by Gordon B. Connor, Ed.D. The principal staff, Frank S. Greenberg, Leon Brenner, Ph.D., Elliott A. Krause, Paul Kaufman, M.D. and Hugh Miller, M.D. did not share the values of the parent organization which were heavily religiously based in Methodism.

The report states:

" When the project got underway, one of the expectations built into the Project Plan was that the Center would become an integral part of the Goodwill Industries setup almost from the start. Yet, almost from the start it became evident that there were elements of mutual apprehension and lack of communication between Center staff and many members of the Goodwill Industries staff at the

foreman level or other key positions. In addition, the nature of the difference in populations between the Morgan Memorial Goodwill Industries population - 'socially isolated' and highly resistant to professional services of any type - and the more cooperative and dependent clients at the Center made it obvious that it would be quite difficult (1) to schedule Center clients within the Industries, (2) to expect the Industries staff to work closely enough with the client to be of very much help, or (3) for the Center to help clients of the Industries without careful selection. One other idea, simply to disperse the professional staff of the Center throughout the Industries, could have been tried, but only at the cost of weakening the Center itself - as it had been set up, planned and funded from Washington."⁶

In its concluding chapter, the report continues,

" There has been a special empathy between the Center and the Morgan Memorial complex, and its Goodwill Industries in particular, by reason of the original philosophic and practical links between labor and salvation in the founder's attack on problems of poverty, demoralization and delinquency. 'To work is good' is a basic concept. The values of incorporation of such a center into an existing organization, with wide varieties of activities to which clients can be exposed, with some wage-incentive tasks available, is obvious. The setting was most promising both for the demonstration project and for the total institution, providing a substantial base of operation for the one and an experimental, progressive facet to the other.

In ways, the results have been less than might have been hoped; in other ways, somewhat more. There has been a greater sense of separateness between the Center and the parent agency than was envisaged. Differences in physical location, on opposite sides of a Turnpike and a half mile distant from each other, have contributed to lack of close intimacy. Differences in client characteristics, as shown in Center research, separated the old from the new (the more aged from the younger populations). Differences in professional training and salary scales between the Center staff and Morgan Memorial employees, and perhaps, misconceptions leading to identification of one as 'technicians' and of the other as 'missionaries,' accentuated superficial divisive

elements. But, with time, a far higher degree of integration has been achieved and is promised to develop.

At the same time, the presence "in the family" of a professional team has been challenging on both sides of the Turnpike. The professionals have been forced to demonstrate, to a very practical group of experienced, if not relatively untrained academically, workers the contributions their specialties can be expected to make in the vocational rehabilitation of the severely handicapped. And the untrained workers have been able to expand their understanding by exposure to professional thinking and practice. It has been a salutary and stimulating experience on both sides of the 'pike'. And once the early hurdles have been cleared, the progress toward greater interaction in the interest of all beneficiaries and of all staff is bound to accelerate.⁷

It is evident in this report that initial aspirations for an integrated program were not to develop. The Center staff perceived themselves as "professionals" and described the Industries personnel as "untrained", almost immediately setting up a caste system. Next, as mentioned, there were severe salary and wage discrepancies with personnel in the Industries earning slightly more than minimum wage for line supervisory work, and Center staff earning at middle income levels with substantially better fringe benefits including health insurance, greater paid vacation and leave benefits, and a shorter work week (35 vs 40 hours). The lever consistently used by Center staff was "that is the way the grant was written, and we better not deviate from it." While the original Project Plan, drafted into existence by Hartl, Toma, and Helms had the operation of the Center under the control of the Coordinator of Rehabilitation, Hartl; for all

practical purposes the Center Director was running an autonomous operation with his own service, support and administrative staff.

This contributed greatly to the schism across the Turnpike.

At the conclusion of the grant period, Project 1576 (RD-1576) A Research and Demonstration Project to Provide Comprehensive Vocational Rehabilitation Services to the Deaf was underway at the Center. It had gained a surplus after its operation "...of \$43,000 available at the end of the project for continuation of the program under sole grantee support."⁸ In addition, the Center was beginning to build its reputation in the academic community, assisting in studies of motivation and dependency with Margolin and Goldin of Northeastern University, with Meyers at Boston University, student internships were established, and with Cubelli at Harvard, field placements were developed for students in the Psychiatric Rehabilitation Internship Program operated conjointly with the Medical School and Massachusetts Mental Health Center. All of the aforementioned programs were funded in whole or in part under education and training monies of the Office of Vocational Rehabilitation's enabling legislation, Public Law 565, the Vocational Rehabilitation Act of 1954. All were active members and leaders of the National Rehabilitation Association, and particularly active in the Massachusetts Chapter as was Emil Hartl. The Center was an integral part of

the Rehabilitation Network, looking for leadership in its own community rather than to its parent organization, and the parent organization looked to the Center to share in its professional accomplishments.

Development of Present Vocational Rehabilitation Programs:
Boston, Lynn and Worcester

In March 1966, this writer was assigned to Morgan Memorial's New England Rehabilitation-For-Work Center as a field work student from the Psychiatric Rehabilitation Internship Program run by Cubelli. As a state Vocational Rehabilitation agency counselor I had voiced substantial reservations concerning the abilities of agencies such as the New England Rehabilitation-For-Work Center (NERFWC) to deliver services which would result in the rehabilitation of severely disabled, particularly psychiatrically disabled clients who were increasing in my caseload because of my assignment to the State Hospital at Danvers, Massachusetts. I was assigned to work with Mr. Frank Greenberg, Chief of Client Services. After some observation of program activities it became clear that psychosocial rehabilitation as practiced at the Center was a very effective vocational rehabilitation tool.

Simply stated the model consisted of the sharing of observations by each of the professional disciplines as expected: Rehabilitation Counseling, Social Work, Medicine,

Psychiatry, Psychology. What was different here was the inclusion of vocational personnel, the foreman of a work area; the residential supervisor; or any other individual with whom the client was involved during program or social times. Each was accorded the respect and recognition of worth of contribution of his colleagues as the other. There was truly no hierarchy of decision making as observed in the medical model. Portions of the rehabilitation plan developed, were parcelled out to the staff member most capable of handling the assignment. There was consistent shifting of roles, but responsibilities remained very clear in the written rehabilitation plan.

Since a work product was required for completion of the field placement, Mr. Greenberg suggested development of a model vocational rehabilitation program plan for the Northshore area in which I had been working. This program plan, modelled on the Center, was completed to the satisfaction of Mr. Cubelli, the placement terminated, and at the end of the PRIP, I returned fulltime to Danvers State Hospital as an outstationed Rehabilitation Counselor of the Massachusetts Rehabilitation Commission. Initially, the model developed during the field placement was proposed for development to the Massachusetts Rehabilitation Commission, while strongly supported by Mr. John Levis, Supervisor of Mental Disability Programs, there were not sufficient funds available to attempt such a state operated program. Next the

concept was presented to Mr. William T. Kelley, Director of the Northshore Workshop located on the grounds of Danvers State Hospital who involved Ms. Leila Kiley, Executive Director of the Northshore Mental Health Association. The project paper was seized as an opportunity for the Mental Health Association to secure federal funds to expand and improve its workshop program.

In the Fall of 1966, I was asked to attend the Morgan Memorial Annual Retreat at the Fresh Air Camps in South Athol as a resource person representing the views of a state agency counselor. During the three days of the conference, Emil Hartl and Frank Greenberg approached stating that the field placement project which was written had been converted to an Expansion and Improvement grant for Northshore Goodwill Industries at Lynn. It appeared that it would be funded at the beginning of the next fiscal year, and was I interested in operating that program?

At the conference there was discussion of the pending Lynn program, and it appeared that this was the first time that there had been an agency wide look at the new program and its implications. There was some discussion about replication of the program in Worcester the following year. There was however, no substantive discussion of that development either. While there certainly was the opportunity to do essential planning, the opportunity was not realized at that conference or at a number of them in the future.

On July 6, 1967, the Rehabilitation Unit at Northshore Goodwill Industries was established with the hiring of its unit supervisor, William T. McCarriston; rehabilitation counselor, Ms. Rachel Rivela; social worker, Ms. Loell Revell; psychologist William Reed was dispatched from the Noyes program weekly. Stephen Kaber was hired as activities of daily living instructor; the medical component was covered by Phyllis Connolly, nurse; George Arroll, M.D. physician, and Marshall Merkin, M.D. psychiatrist. There were two evaluator instructors hired for the unit, Richard Bennett for hard goods, and Hikmet (Sophie) Abrams in the textile department. This unit also had its own clerical and bookkeeping support in Nancy Fraser and June Moreland.

It was never truly clear what the lines of authority and responsibility were at Lynn Goodwill because Mr. Arlington W. Crossman, Branch Director reported to Mr. Barres, and the Unit Director reported to Dr. Connor, Noyes Program Director and Director of Rehabilitation. Perhaps this lack of clarity contributed to the development of an integrated program more quickly because many of the problems discussed above in relation to the Noyes Center and the Industries never surfaced at Lynn.

In addition, the Evaluator/Instructor positions were located in the heart of the Industries at Lynn, with these personnel performing assistant foreman duties as well as client training in live work situations. There was never a

question as to whom was in charge - it was always the foreman. The role of the evaluator instructor was one of the most crucial parts of integrating both programs.

A second major departure from the Boston situation was the incorporation of the line foremen in "case conferences" where their input was valued, and they were enlisted as program participants with clearly specified functions in each client's program. The case conference method, still utilized extensively in Morgan Memorial is a direct descendent of Sheldon and Hartl's very early efforts at the Hayden School. In this method each discipline is expected to contribute to the sum of information available about a client, and a comprehensive action or rehabilitation plan is developed with each team member being assigned very specific responsibilities within her/his professional responsibility area - some specific objectives with clearly specified techniques to be applied.

The final difference which assisted in the integration of the unit was the worker population at Lynn. Most of the foremen were older, however, many of the disabled workers were younger, in their early twenties or thirties, providing an opportunity for the rehabilitation unit to demonstrate its expertise by transitioning these persons into competitive employment. Four of these persons were able to be competitively placed in the first year of operation, and two

were upgraded to full employee status, giving substantial credibility to the unit.

Mr. Arlington Crossman, director of the Morgan Memorial branch operation at Lynn, made it clear to his staff that he wanted this newly formed unit to succeed by his presence at case conferences and at in-service trainings. His cooperation in securing the physical necessities of establishing such a program was outstanding.

Funding for this program began July 1, 1967, a full complement of staff was hired by September 1, and the first referrals began to trickle in. The first caseload consisted of four referrals from the Massachusetts Rehabilitation Commission and the six "workers" from the Industries. During the first year of operation, referrals increased to an average daily caseload of fifteen, sufficient with the grant in aid of \$67,000 to make the unit self supporting, cover its overheads, and contribute to the overall general and administrative costs of the organization.

Instead of relying on only one source of referral, during the second year of its existence, the project contracted with the Welfare Department as part of the WIN program to attempt to place public assistance recipients into competitive employment. For a period of six months the program capacity swelled to twenty five plus persons referred from the Industries. The WIN demonstration was most successful because eight out of nine male heads of household AFDC (aid for

families with dependent children) entered competitive employment. In the second half of the second year, with the caseload dropping to fifteen, there was need to develop a new market for services. Dr. Gordon B. Connor, Director of Rehabilitation Services (formerly a director of the Catholic Guild for All the Blind and a colleague of Father Thomas Carroll, its founder) suggested a marketing effort with the Massachusetts Commission for the Blind.

Staff was very apprehensive about work with the blind since there was little or no experience upon which to base such a practice. After considerable training at St. Paul's Rehabilitation Center in Newton, Massachusetts, the staff began to come to grips with its fears and prejudices concerning rehabilitation services for the blind. Instrumental in addressing this attitude problem was Thomas Caulfield, M.D., psychiatric consultant at St. Paul's. He dedicated a series of orientation conferences and specific trainings both at St. Paul's and at Morgan Memorial in Lynn. Before the trainings were completed, Dr. Connor introduced Messrs. Robert Scott and Fred Greehan of the Massachusetts Commission for the Blind to the unit in Lynn. Referrals began to be made immediately and the caseload was restored to a healthy twenty-five again.

Later in 1968, the Eliza Henry Home in Boston was closed in preparation for razing. Efforts had been underway to find a new residential facility since 1966 when it became apparent

that there would be no residential facility for the out of state referrals to the New England Rehabilitation-for-Work Center. Mrs. Ruth Sears, Chief of Social Services, and Ms. Marjorie P. Linder, Director of the NERFWC, had located the former rabbinical seminary/ Jewish Home for the Aged on Pope's Hill in Dorchester as the potential site for the residence. The buildings were purchased, but designated for the use of the Hayden School. There was to be no residential facility for the NERFWC.

The Maine Bureau of Eye Care, under the direction of Mr. Owen Pollard continued to pressure Morgan Memorial to redevelop a residential program because there were no vocational rehabilitation programs for the blind in the State of Maine in 1968. This need was transmitted to the Lynn unit by Dr. Connor, and Ms. Loell Revell and Mr. McCarriston began to search the City of Lynn for an economically feasible residential facility. After several months, the Hotel Osmund in Lynn agreed to provide individual rooms for referrals on an as needed basis, with a store front at street level rented as a commons room, kitchen, dining and activities room.

Almost immediately, the caseload grew to its capacity of thirty five persons per day, with a waiting list being established in 1969. The program in its third year had not only covered its costs, but had turned a tidy net profit of \$34,000 on a gross revenue figure of \$120,000.

Concurrent with the second year development in Lynn, Morgan Memorial, Dr. Connor and Frank Greenberg, had prepared another application for Vocational Rehabilitation Administration which was initially patterned upon the Lynn program. When they were told that there was no extensive Expansion and Improvement money available for the entire grant, rather some \$20,000 in staffing, but some \$80,000 in Laird Equipment money, (funds available for equipment to establish vocational rehabilitation facilities as a result of the Laird Amendment to the Health, Education and Welfare Appropriation Act of 1966). Morgan Memorial determined to go forward with the development of a rehabilitation program at its Worcester branch.

Mr. Peter Levine was hired as Supervisor of Rehabilitation Services. He soon assembled a staff very similar to that in Lynn and Boston; however, Worcester did not see the rapid development of referrals from other agencies which was enjoyed by the sister units. Despite very active support by Mr. Gordon Damery, Massachusetts Rehabilitation Commission's District Supervisor - later to become Regional Supervisor prior to his retirement, there were fewer than twelve clients on the caseload at the end of the first year. Mr. Levine resigned, and Ms. Marjorie P. Linder was transferred from her position as Director of the NERFWC to the Worcester unit in late 1969. Referrals picked up almost immediately as a result of her excellent marketing skills.

Daily caseloads rose to twenty-five to thirty as a result of her ability to deliver the various individual programs which referring agents had requested. Further, her training of the staff at Worcester created a mirror of the esprit and professionalism that had marked her work at NERFWC. By 1970 the Worcester unit was virtually breaking even financially and had gained the confidence and respect of the Worcester office of the Massachusetts Rehabilitation Commission, its sole referral source.

Charles Hayden Goodwill Inn School

The Charles Hayden Goodwill Inn School which had been housed in the Seavey Settlement since the demolition of the Wheeler Street building in 1963, moved in November into its renovated facility on 21 Queen Street, Dorchester, Massachusetts. This new facility appeared to offer the space and physical plant so long sought after by Hartl and the Hayden staff. It comprised about 65,000 square feet laid out on four floors, each containing three "wings". The "footprint" of the building resembled the letter E, the long bar facing Queen Street and the three wings running front to rear on the lot. In the first tier or wing there were three dormitory units designed for twelve boys per unit. In the next wing were the administrative offices on the first floor, classroom and educational support space on the upper floors. The third

wing housed the recreational facility, dining room/kitchen, and on the two upper floors, staff office space. Under the leadership of Mrs. Sareba Smith, the school had secured accreditation as a special education facility in 1966, and at the time of its move into the Queen Street facility, 1968, was a highly respected and utilized program principally for inner city youth referred by the Division of Child Guardianship or Division of Youth Services.

Fresh Air Camps

In the post World War II era, virtually all manufacturing and other commercial ventures had ceased at South Athol. The Camps were still committed to "Food, Fun, and Fresh Air"; however the years were beginning to take their toll of the physical plant. On all but the newest buildings, roofs were beginning to need replacement, worn out water systems needed updating, and there was a need for significant work which was beyond the means of the two man maintenance crew to deliver. The Camp programs still consisted of taking about 400 youngsters from the inner city for eight weeks at camp. Senior citizens, who were also a significant segment of the camp continued their program, formerly housed in the Crawford Rest Lodge, at Buss Inn. This particular facility, in addition to much attention by the maintenance crew, was overseen by Mr. and Mrs. Byron Churchill and Mrs. Emily MacDonald. Mrs. Churchill was a volunteer Director of

Volunteers for Morgan Memorial for many years. They selflessly expended substantial amounts of their time and personal resources in renovation and rehabilitation of the Buss Inn so that the program for senior citizens, which they ran as volunteers until 1985, could continue.

Other Children's Services

With the closing of the Children's Settlement and Day nursery in the early sixties, Morgan Memorial ceased to provide any services to children and youth except as noted at the Fresh Air Camps and Charles Hayden Goodwill Inn School. The Turnpike taking clearly had removed a significant portion of the work of Morgan Memorial Goodwill Industries, and the component upon which Edgar Helms had initiated his ministry in the South End.

Seventies

In addition to the tremendous loss of assets by the turnpike taking, Morgan Memorial was forced to take on substantial additional operating expenses - the organization of the truck drivers and helpers added substantially to operating costs within Goodwill Industries, to the point of consuming fifty cents of every dollar generated by Industries store sales. The 21st Century Fund was for all practical purposes dead in the water with insufficient funds being raised to cover the abortive campaign costs in part due to

some very negative public relations concerning Morgan Memorial's possible involvement with the Boston Patriot's Stadium.

There was the matter of a \$900,000 construction mortgage due on the Hayden School, and finally, there was no central control of finances as had been the case in the Moore days. Accounts payable were used to finance the deficit from operations; however, even that was running out as an option as payables aged for up to one year to the amount of \$239,546 and continued a deficit in the current fund of (\$782,033).⁹ Goodwill was losing the goodwill of the business community.

John B. Determan, Jr. was hired from the Rheem Corporation in New Hampshire as controller of the organization in March 1971. He began to unravel the financial picture which showed clearly that all operating departments were in fact operating in the black; however, that was before there were any overhead or general and administrative charges added to the fiscal picture. No one was paying a share of overhead. Consultants were brought in from Goodwill Industries of America to assist in the solution of this most dangerous situation.

Simultaneously, Dr. Connor left the organization to head Technoma Workshops in Pittsburg, Pennsylvania as its Executive Director. William Mc Carriston was called to Boston in April 1970, interviewed by Dr. Hartl and Rev. Helms, asked to assume

the Director of Rehabilitation position vacated by Dr. Connor.

Mc Carriston agreed to take the position in June of 1970 with the charge that he "integrate the NERFWC and Industries programs at Boston as well as he had integrated them in Lynn" (charge by Hartl).

Within days of arriving at his new position, Mr. Determan had developed a business plan which required draconian cutbacks if the organization were to survive. Each department was given budget targets for cutback stated in weekly salary amounts. The division of rehabilitation services was slated to cut \$10,000 per month in salaries on a total division annual salary budget of about \$300,000. This was to be done and program was to be retained.

Within the Division of Rehabilitation Services, during the month of June, 1971, there were many meetings to discuss how this might be accomplished if at all. Marjorie Linder was now Supervisor of Rehabilitation at Worcester, Ronald Freedman at Lynn, and Mc Carriston was both Director of Rehabilitation and Boston Program Supervisor with the transfer of Linder.

The decision was made to preserve the vocational nature of programs, and to cut the medical and consultant positions completely out because, at least in theory, these services would be provided by the referral agencies (while done, they were never rendered with the information able to be generated by in house consultants in a face-to-face case conference

discussion). It was believed that with only vocational offerings of work evaluation, work adjustment, job placement and follow-up services, quality of client service, satisfaction of the referral agency, and caseload levels could be retained.

In Worcester that translated into the loss of its physician, psychiatrist, nurse, and one clerical position. Lynn took identical cuts. Boston, which was the largest in staff, took the greatest cuts. A registered nurse, a public health nurse, lab technician, physician, psychiatrist, a clerical, and a job placement specialist whose position had been subsidized in the past by Easter Seals Society's Just-One-Break program were laid off.

The cuts were made July 1, 1971, and a significant segment of program was severed; not to resurface until nearly ten years later.

In a July 15, 1971 letter to Mr. Proctor Coffin, then chairman of the Northshore Advisory Committee, William Mc Carriston outlines the problem:

...We can report that we have not arrived at an appropriate fee schedule with the Massachusetts Rehabilitation Commission. We do know that overall our fee income must be lower next year because of budgetary cuts in the state-federal program. We have been informed by the Massachusetts Rehabilitation Commission that they will be unable to support as comprehensive a program as we have had in the past.

A possible problem area could result from the fact that the federal government has granted many thousands of dollars to us to develop comprehensive programming. To obtain such funds we had to agree

to continue this program in conjunction with the Massachusetts Rehabilitation Commission. Since they are unable to keep their commitment to this programming, we are asking that they put their rationale into writing so that at a future date Morgan Memorial will not appear to have unilaterally withdrawn from its commitments. This could jeopardize our potential to receive other federal funds....

In the interim, staff, particularly in Boston has been reduced from an average monthly cost of \$11,000 to approximately \$6,750....

We anticipate a change in program emphasis to a vocational orientation,....¹⁰

Boston was faced with another unusual problem. The previous policy adopted by the rehabilitation department was to guarantee employment in Goodwill Industries for all persons who had successfully completed a four week vocational evaluation. By 1971 there were more than 200 persons who were counted as "sheltered employees" on the payroll of Morgan Memorial Goodwill Industries of Boston. The departmental space of the Industries, already reduced in 1969 by the "integration" of rehabilitation staff who took precious space for offices and related activities, were physically overwhelmed by disabled people.

At the Fall of 1971 retreat in South Athol, an executive staff policy direction was established for the Boston rehabilitation staff,

"Move out as many persons from sheltered employment as possible!" The basis for this decision was in response to staff stating in one of the meetings, "We cannot place persons in the Industries for evaluation, adjustment or training

programs because there are no longer any slots." This problem was reflected in the "sponsored caseload"- referred and fee paid clients - numbers diminishing from a high of fifty-five in 1969 to a mere twenty-five in September 1971.

Another dynamic operating at this point was substantial competition which had developed in the years 1965 to 1970 by Community Workshops and by Jewish Vocational Services (JVS) of Boston. Both had been programs of long duration, Community Workshops predating the incorporation of Morgan Memorial by two decades was now under the leadership of Mr. Simon Olshansky who had diversified the shops vocational offerings from solely needle trades to include woodworking and subcontract (assembly and packaging for competitive companies) work. Dr. Simon Hoffman, Director of Jewish Vocational Services had not only built an excellent subcontract shop to provide vocational offerings, he had also developed a fine professional staff to provide supportive services as well as vocational offerings. Additionally, JVS had developed a most effective placement arm as had Community Workshops at a time when Morgan Memorial was cutting back in both areas. Staff at Morgan Memorial also began to use the placement services of JVS and Community in the attempt to move the two hundred persons who were in the Industries. There was little cognizance of the threat posed by the competition to Morgan Memorial. There was no analysis of the impact that these two organizations might have on the referral processes in Boston.

In short there was no strategic assessment done prior to initiating actions which dramatically effected program and program process. This resulted in a steady decline of referrals to program by the Massachusetts Rehabilitation Commission in Boston. By 1972, the number of referred clients served daily dropped below ten. Revenues dropped as did staff size.

General Conditions of Morgan Memorial in the Seventies

Physical Plants

Boston Headquarters

The physical plant at Boston was becoming shabbier and shabbier with little investment in housekeeping or ordinary building maintenance. The structure was a former plumbing warehouse that had been converted to use as a Goodwill Industries.

It occupied six stories, was made of reinforced poured concrete, and contained some 105,000 square feet. The first floor and half of the basement were established as the retail operation. The second floor was given to textile finishing, (cleaning, pressing and otherwise preparing garments for

resale. The third floor was used primarily for "bag opening" and sorting of donations. Floor four contained the cafeteria, executive offices, chapel and medical suite. The fifth floor was used principally for processing hard goods (electrical appliances, household goods, shoes) and contained a print shop. Furniture was repaired and refurbished on the sixth floor. All areas were poorly lighted, and there was ample evidence of "pack ratting", nothing thrown away that might ever be reused.

The lint from the textile operations, sawdust from the furniture operations, and general grime was prevalent throughout the building. Add to this very poor lighting, and the image Morgan Memorial projected was not unlike that for which F.C. Moore was chided a number of years before.

The Boston headquarters of the organization was perceived very positively and very negatively by referring vocational rehabilitation counselors, principally from the Massachusetts Rehabilitation Commission. Positively in the skillful development and employment of psychosocial services that it offered, and was referred to as "Goodwill" in this favorable context; negatively, in the poor physical environment in which services were delivered and was referred to as "Morgie". The name used in a discussion was an early identifier of the context of the conversation.

The major vocational activities upon which to base vocational rehabilitation services consisted of the

contributed goods operation: refurbishing, repairing and reselling donated materials.

There were three elevators servicing the building, two freight and one passenger elevator that had been installed, used, at the time of the move into the building in the mid sixties. The building was far from meeting architectural barriers standards as we know them today. Materials were moved from street level throughout the building by means of an elaborate conveyor system for textiles, and by freight elevators for furniture and hard goods.

There was a warehouse building on East Berkeley Street (formerly named Dover Street) in which a small candle manufacturing job was performed on the second floor (Kennedy "Flame of Hope"- an enterprise initiated by the Kennedy Family to support employment for mentally retarded persons). There was a very small subcontract operation in place here also, but the number of persons served in the area was fewer than twenty at this time. This building was also in great disrepair. It had no passenger elevator, but a converted automobile elevator served as both a freight and passenger elevator to the upper three floors of the building.

Northshore

In Lynn, the Northshore program operated in two wood frame buildings at 124 and 140 Oxford Street which were joined

by an overhead covered walkway on the second and third floors. There was an elevator in the 124 Oxford Street building which served both as a freight and passenger elevator. Programs here were for the most part unaffected by events in Boston - principally the negative feelings generated by the lay-off and the subsequent down turn in referrals because the client base in Lynn had been developed with a number of referral sources throughout New England, picking up the referrals lost to Morgan Memorial due to the closing of its residential programs. In Lynn, residence services were provided at the Hotel Osmund, just a short walk from the facility. This program attracted referrals from Maine Eye Care, New Hampshire Bureau of Blind Services, Connecticut Division for the Blind and the Massachusetts Commission for the Blind in addition to referrals from the Massachusetts Rehabilitation Commission. Its caseloads remained consistently between 25 and 35 since the second year of its inception until there was a disastrous fire at the 140 Oxford Street building in March of 1973, just one month after Mr. Jonathan A. Odence had been appointed Supervisor of Rehabilitation Services. The fire destroyed the entire 140 Oxford Street building and with it, professional offices, medical complex, administrative offices, retail outlet and virtually all records.

The immediate response to the crisis was to find emergency housing for program and administration on the second floor of the retail outlet on Union Street in Lynn. When the lease

here was unable to be renegotiated during the summer of that year, a new retail outlet was established on Washington Street, around the corner from the original building, with Program and Administration attempting to share odd space in the mezzanine of the building. In the interim, a Northshore Committee composed of leaders in the industrial community was formed by Henry Helms to locate a new suitable premises for the whole operation. Members of this committee were: Mr. Arthur Burke, Chairman and Morgan Memorial Board Member, from Eastman Gelatine Co.; Mr. James Skully, GTE Sylvania, Mr. Jack Sweeney, Lynn Chamber of Commerce; Mr. Clyde Fauria, General Electric Co.; and Mr. Barron Meyer, also of G.E. This was accomplished in 1974 with the development of a purchase and sales agreement with Puritan Realty Corporation, owners of the Swartz and Benjamin Shoe Company for a 60,000 square foot, single story, barrier free building. Financing for the building had been obtained through the Small Business Administration and a local bank. An equipment grant had been obtained from the Massachusetts Rehabilitation Commission and the Rehabilitation Services Administration in support of the new facility. However, In December 1974, as Goodwill was preparing to pass papers on the facility and to move in, the Building Inspector of the City of Lynn refused to issue an occupancy permit, requiring Morgan Memorial to seek a special use permit from the City Council, City of Lynn. A series of hearings were held; the Council denied the permit,

subsequently approved the permit which was then vetoed by the Mayor, Mr. Anthony Marino. While a law suit was filed against the City, it was two years later that Morgan Memorial prevailed; a hollow victory since funding, financing and the opportunity were lost. The fiscal decline of Morgan Memorial would not have permitted such an undertaking in 1976.

With no reasonable facility, referrals to program declined rapidly to as few as five persons by 1974 and 1975.

Worcester Goodwill

At the time of its acquisition on a partial purchase and partial donation basis from the Stop and Shop Stores, the "old Brockleman's Market Building" was also in great disrepair. A complete renovation of the structure was to have taken place by the contractors of the Massachusetts Housing Corporation, a sister corporation to Morgan Memorial established by Edgar Helms for the purpose of providing housing in the South End. The renovation actually consisted of replacing the roof of the building and the removal of substantial materials from the top floor of the market in which a bakery had been housed. After expenditure of some \$40,000, major work was discontinued on the structure for lack of funds. The main floor of the building was divided into two major sections. That which fronted on 631 Main Street was dedicated to retail operations. The rear portion was used for processing contributed

merchandise. There was a mezzanine in the facility which housed administrative and later, in 1968, rehabilitation staff offices. There was an addition to the building in the rear which was used primarily for warehouse purpose. This portion of the building housed the toilet facilities for the whole operation. In July 1974 there was a major fire at the Worcester facility. It destroyed the warehouse portion of the building, caused major smoke and water damage to the rest of the facility. Nearly 20% of the building was totally destroyed.

Immediately after the fire, Mrs. Virginia C. Witty, Branch Director and Marjorie P. Linder, Rehabilitation Supervisor, set about to continue all operations. On the day following the fire, the Goodwill set up sorting and processing operations in its parking lot. Client services continued without interruption, although counseling and other sessions were held in unusual places such as staff automobiles. The staff instantly began the clean up of the facility, and within a week were able to reenter the building. The Worcester Committee set about looking for other quarters in the area, but without real success. The programs at Worcester survived their disaster in better operating condition than at Lynn because the Worcester Fire Department had preserved most of the main building. There was no real interruption of client service and no caseload diminution as had occurred in Lynn.

Despite the fire, all seemed to be operating well in Worcester in 1975.

Fresh Air Camps

With the exception of a new Administration Building/Dining Hall, Cooke Camp and a new Health Center donated in 1959 and 1960, there was little investment in the 34 buildings which were part of the Fresh Air Camps. Gradually buildings became less and less useable. Some were torn down, others just fell down. By 1975 there were facilities for fewer than 200 youngsters at the camp. Buss Inn which housed the camp for senior citizens was maintained in excellent condition by Mr. and Mrs. Byron Churchill, both volunteers, who had dedicated themselves to the Senior Citizen program. Other than ordinary maintenance, very few major repairs or capital expenses were made at the Camp.

Hayden Goodwill Inn School For Boys

The physical plant of the Hayden School presented another problem to Morgan Memorial. At the time of its purchase and renovation at the cost of \$900,000, it was to have been the "state of the art" self contained residential, treatment and educational facility. Early census figures through 1971 reveal up to 77 boys housed there in programs.¹¹ This

appeared to be a very successful undertaking by Morgan Memorial. However, by 1972, the wave of deinstitutionalization had swept into the arena of Children's Services with the arrival of Mr. Jerome Miller in Massachusetts.

The Hayden model of a single large facility was anathema. The state closed the reform schools, residential treatment in small group homes was the new wave in treating at-risk adolescents.

The only facilities of any size were operated by the Commonwealth, and they were "secure treatment" facilities - a euphemism for juvenile detention. Hayden had found its caseload dropping from the high of 77 just a scant year prior to a low in the mid-twenties as a result of the new state policy. Two satellite homes were established on Berry Street and on Sunnyside Street in Jamaica Plain, each for up to six boys which was a partial implementation of the Charles Hayden Inn School for Boys "Plans for the Decade of the Seventies" which called for the establishment of seven satellite homes¹²; however, this did not return the school to its former enrollment and the balance of satellite plans were dropped.. Financial disasters were to follow the School for the next several years in which operating losses often hit \$100,000. On a number of occasions the fate of the Hayden School was seriously debated by the Board of Directors of Morgan Memorial.

The physical plant, which was so great an asset in 1968 had become the major liability of the School by 1975.

Financial Conditions

The losses of the early seventies continued into the mid-seventies unabated. While public fund raising was strong, bringing in nearly \$1,000,000 per year, the deficit at Morgan Memorial continued to mount steadily. The principal causes were the poor performance of the Industries due to very high transportation (of contributed goods) costs, the results of collective bargaining at all three locations (nearly 50 cents on every dollar of industrial revenue was spent on transportation), and the increasing deficits at the Hayden School. Despite a \$1,000,000 unforeseen bequest in 1973 from the estate of Charlotte E. Sills which was used to reduce accounts payable by \$100,000, repay the endowment funds \$700,000 already advanced to plant funds, and \$200,000 to repay the endowment for current working funds advanced,¹³ at one point in 1975, accounts payable for the organization had aged again to over one year. The continuing deficits from operations were being unwittingly financed on the goodwill of Morgan Memorial's vendors.

The deficit from operations in the current unrestricted fund grew from (\$453,961.51) in 1967 to (\$751,660.29) in 1970.

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These losses continued to grow annually, partially masked by outstanding annual contributions, and further hidden by substantial unrestricted bequests each year. For the period, 1962 to 1985, Morgan Memorial had received \$11,681,548 in bequests, averaging nearly a half million dollars each year.¹⁵

In 1977, the actual operating loss was (\$354,134). This deficit was comprised of losses in the Industries of (\$925,358), Boston Rehabilitation (\$57,582), Northshore Rehabilitation (\$42,011), Worcester Rehabilitation (\$76,527), Hayden School (\$100,243) and Camp (\$95,227). Total public support, contributions for the year totalled \$940,312. The operating losses therefore were well in excess of one million dollars.¹⁶

Rebirth of Programs

Background

In 1967, Massachusetts, as a result of conditions in the state mental hospitals, passed the Community Mental Health Act, Chapter 735. This piece of legislation enabled the Commonwealth to participate in the Federally passed program

which provided substantial funding incentives for "deinstitutionalization".

In brief the Massachusetts Act provided a mirror image of the federal legislation for obvious reasons. Six community mental health services were mandated for the emotionally ill, five for mentally retarded persons.

The initial focus in Massachusetts was the state mental hospitals, due principally to very adverse conditions in them. These conditions were graphically portrayed in Frederick Wiseman's documentary film, "Titicut Follies", a depiction of conditions at Bridgewater State Hospital.

From 1968 to 1972 there was nearly complete focus by each administrative region and area on the establishment of community based mental health services, and the dismembering of the state hospital system in which the Superintendent was established legally as absolute authority. The struggles were costly, time consuming, and exhausting as most of the change agents in the system were volunteers coordinated by Area and Regional Directors of the Department of Mental Health.

The Commonwealth of Massachusetts had been divided into Seven Regions comprised of thirty-nine Areas, each with an Area Board and Regional Board of volunteers who were established under Chapter 735 as having the authority to set up and operate Community Mental Health Programs. This writer was elected to the Lynn Area Board, served as its first Vice Chairman under Vincent Mc Manus of the General Electric

Company, and later as Chairman. During this early era, 1968 to 1970, the Area Board in concert with the Regional Board was able to take control of services to persons in its "catchment area" at the Danvers State Hospital, create a plan for services in the Lynn Area, and after engaging the United Way Community Services Planning Council, was able to prepare and submit a successful grant application to the federal government for facilities and staff to deliver community based mental health services in the Greater Lynn Area.

The pattern in Lynn was typical throughout the Commonwealth. The State Mental Hospital System was greatly modified. Patient census was dropped from 2500 at Danvers State Hospital to 250 as the hospital was used as a back up facility for persons who needed longer term care.

A significant segment of Chapter 735 was nearly wholly overlooked in the rush to deinstitutionalize the hospitals. The Act also required provision of services to mentally retarded persons who were in the State Schools. The focus of nearly every community and Area Board was on the development of Mental Health Services, and the State Schools for the mentally retarded continued as before.

Parents and advocates for retarded persons were very dissatisfied with deinstitutionalization progress. In 1970 class action suits were filed in Massachusetts, similar to those in other states, most notably New York, which would require services to the mentally retarded, later all

developmentally disabled, to be provided in the least restrictive environment (community based). The suits, Belchertown, Wrentham, Fernald et al never came to trial. Justice G. Joseph Tauro visited the schools, met with officials of the Department of Mental Health and the Consent Decrees were executed.

With the execution of the decrees in 1971 came the need to build a community based service delivery system quickly.

Boston

In early 1972 Morgan Memorial was asked by the Regional Administrator, Region VI, Dr. William Frankel to establish a community residence and day program for eight mentally retarded adults. Dr. Frankel and the administration of Morgan Memorial had worked together in Region IV (Lynn). There was no planning involved prior to the request, rather, the organization was more capable of providing services to emotionally disturbed persons because of its history of comprehensive psychosocial programming. The opportunity was seized. It required the establishment of a community residence and the development of an activity program. After a major search of the South End area did not produce housing stock which matched the requirements of the request for proposal offered by the Department of Mental Health, four

two bedroom apartments were leased at the newly completed Mass Pike Towers, built on the former Hayden School and Day Nursery land. The program began in 1972, expanded to sixteen persons in 1973 with the acquisition of Fortune House. By 1975, with the development of other residential programs, the requirement that providers operate both day and residential programs was dropped. Morgan Memorial continued to operate its community residences until 1982 in Boston.

Northshore Impact

After the initial success in Boston, the Northshore had begun planning to quote on a day program contract in 1973. These plans were destroyed along with the physical plant in the fire that year. The North Shore Association for Mentally Retarded Citizens became the lead agency, securing extensive residential and day program contracts.

It was not until Morgan Memorial secured its Beverly Workshop facility in 1978 that it began to secure DMH contracts to provide day program services to mentally retarded persons, and to do so most successfully. The transition from the facility in Lynn to Beverly was not direct. In 1974, the Northshore Workshop, operated by the Northshore Mental Health Association in Salem at the Danvers State Hospital was losing its sponsorship by the Association. Morgan Memorial was

approached to ascertain its willingness to take over the operation of this project. Lacking physical plant, the program aspect of the Lynn operation was moved to the former laundry building at the hospital and set up operations just as the hospital population was being dramatically reduced. By 1976 it became apparent to the Northshore staff and Advisory Committee that there would be no community referrals back into the hospital based shop, and there could be no participation in the growing developmentally disabled programs of the Department of Mental Health, so Mr. Jonathan Odence, Northshore Program Director, with his staff and Advisory Board planned and executed a move from the state hospital to Beverly. In the process he had obtained commitments for the development of Day Activity contracts with the Department of Mental Health, had secured an Adult Basic Education and CETA Grants upon which to redevelop his community based program.

On Memorial Day weekend, 1978, the entire staff of the Northshore Branch of Morgan Memorial Goodwill Industries, Inc. physically moved from their facility at the State Hospital to the renovated Post Machine Building at 140 Elliott Street in Beverly, Massachusetts. Following that move, client service statistics grew from daily service to 22 persons at the end of 1977 to more than 175 daily in 1989.

Worcester Goodwill Industries

The move to deinstitutionalization did not have a major impact on Worcester Goodwill. As in Boston, the program remained a highly sophisticated psychosocial comprehensive offering, despite cutbacks. The program was seen as designed for persons with emotional illness and not persons who were mentally retarded. Developmentally disabled persons were nearly always referred to the Worcester Occupational Training Center. Inpatient vocational rehabilitation services were offered at the Worcester State Hospital Workshop, Vocational Adjustment Center. By the mid seventies, the Board of Directors of the Vocational Adjustment Center realized that the wave of deinstitutionalization was reducing its potential caseload dramatically, and it opened an operation in the City of Worcester, known later as the Roger Bruce Training Center.

For the most part, program referral patterns continued in Worcester Goodwill uninterrupted. Marjorie Linder was succeeded as Rehabilitation Supervisor by Joel H. Smith in 1974. Ms. Linder leaving to direct a new program developed at Lawrence General Hospital for alcohol abuse rehabilitation.

In the days immediately following the 1974 fire, the Worcester Advisory Committee under the leadership of Mr. A. Donald Kelso, Mr. Harold Bloomfield, Mrs. Julie Chase Fuller, Mr. John Curran, Mr. Theodor Meyer, Mr. Richard H. Harris, and

Mr. Robert Mc Cray set about to find new and appropriate quarters for Worcester Goodwill Industries. By late in 1975 a plant on Hope Avenue was found to be the most suitable site, an 80,000 square foot one story building which was essentially barrier free. As plans were being made for the acquisition and development of the building, the Worcester Committee balked at assuming the responsibility for the fund raising associated with the acquisition. It was their expectation that the requisite funds would come from Boston.

Boston made it clear that there would be no funds forthcoming as there were none to spare. Enthusiasm for the new plant cooled instantly. The prospect for raising the amount needed to acquire this property was very poor in the Worcester community because of a competing capital funds drive to restore the Mechanics' Hall.

While there was substantial time spent on internal assessment of the need for a new facility, and even more time expended working out space requirements, flow of industrial operations, and operating finances, there had been no true strategic assessment of this fund raising project's viability in the community prior to that time. By 1976, the prospect for a new plant were all but forgotten.

Despite the poor facility, referrals continued from the Massachusetts Rehabilitation Commission's Worcester office at a regular pace. The caseload at Worcester remained in the twenty to thirty five range for the balance of the time of the

Worcester program. Services offered were very acceptable to the counselors of the Commission as evidenced by this fact.

As on the Northshore, the impact of deinstitutionalization was not felt in the Worcester program except as a former state hospital patient might be referred through the Massachusetts Rehabilitation Commission. Efforts to secure contracts for services to clients of the Department of Mental Health were not successful. Contract patterns followed referral patterns. The Occupational Training Center which was noted for its services to the developmentally disabled won virtually all day program contracts. Mental Health services were provided through the local Mental Health Association.

On December 31, 1979 Worcester Goodwill Industries was closed as a result of several factors.

First, the operation was not able to sustain itself with requisite general and administrative costs associated with it.

Next, the Advisory Committee was unwilling or unable to assume the responsibility for the viability of that program.

Third, and most convincing for the parent Board of Directors was a study done by the Social Service Corporation in Worcester in late 1978 which seriously questioned the need for Worcester Goodwill Industries at all. It raised the issues of competition in the resale business with a long established Salvation Army and St. Vincent de Paul organizations in the community. It questioned the need for

Morgan Memorial's service delivery in competition with the Occupational Training Center, Roger Bruce Center, and Vocational Adjustment Center. The newly formed Venture Corporation in Grafton had begun to erode a segment of the referral base. The study concluded that the resources of the community might be strengthened if the competition were reduced by the closing of the Goodwill Industries.

Perhaps the final concluding note to the closure was the questioning of Elmer C. Bartels, Commissioner of the Massachusetts Rehabilitation Commission as to what were Morgan Memorial's intentions concerning a new building? What was proposed concerning closing the entire facility in view of an announced taking by the Governor of the Commonwealth, Michael S. Dukakis on Christmas Eve, 1978.

The entire facility was closed and put up for sale one year later. At the Board of Directors meeting, November 23, 1980 the resolution was passed to sell the property. Even this last act was complicated by a Ms. Barbara McCorrison and the Worcester Historical Society, who had had the building added to the Register of Historical Buildings. The closing and sale of the property were very complicated, again far more so than anticipated because of an unplanned occurrence.

Hayden School

During this period, the School was undergoing a number of transitions. It received licensure and accreditation as a special education and group care facility, despite complaints about its physical plant. Dr. Emil Hartl was approaching retirement and turned the day to day operations of the School over to his Associate Director of many years, Mr. Harold Smith. He and his wife Sareba, who was principal and a certified special educator did a great deal of work to curricularize the educational, vocational and recreational offerings at the school. Despite their efforts, the census at the school seldom rose above twenty five to thirty. The Hayden School had become, however, the only staff secure facility in the entire Greater Boston Area for hard to handle "youth at risk".

Goodwill Industries

The middle seventies continued to be trying times. The Lynn contributed goods operation was closed in 1976; however, the materials from that area continued to be collected for processing at the Boston plant. An effort to curb escalating transportation costs by contracting collections out to a specialized firm , using containers and trucks designed for

collecting trash, was highly successful in collecting an enormous volume of materials, some 10,000,000 pounds or more in a year. The cost per pound of collection had dropped as was anticipated in the preplanning of the project. Mechanical modifications engineered to facilitate bulk handling of the material never functioned properly. Handling costs for this material, mostly textiles, soared with the need to develop a two shift operation just to handle the volume. The notions of "bigger is better" and the false side of "economy of scale" were clearly at work here. The overall financial condition of the agency did not improve.

In 1975, Morgan Memorial Goodwill Industries, Boston had its first accreditation survey by the Commission on Accreditation of Rehabilitation Facilities. Preparation for this survey involved substantial renovation of the Berkeley Street facility.

In addition to a general cleaning and some repairs to the operating systems, the entire facility was relighted. Vocational evaluation equipment and staff were secured through grants from the Department of Education, Bureau of Occupational Education. Physical facility improvements were funded from grants from the Schrafft Foundation, the Boston Foundation (Permanent Charities) and other grants. In the accreditation survey, the excellence of staff and program were noted as was the updated appearance of the facility.

The survey report was successfully used as a reference for potential service purchasers. The investment in plant provided a far more attractive environment for service delivery. This resulted in continuing contracts with the Bureau of Occupational Education, expansion of the Department of Mental Health contracts, the development of program with the Boston School Department, Department of Special Education, performing assessments for Chapter 766 eligible school children.

In 1976 the Massachusetts Rehabilitation Commission and the Massachusetts Chapter of the Association of Rehabilitation Facilities were successful in securing passage of legislation known as the Extended Sheltered Employment Act of 1976 which would permit the Commission to provide funds to maintain "slots" in workshops such as Morgan Memorial for persons whose disability was so severe as to greatly diminish their capacity to work except in a sheltered environment and at less than the minimum wage. Morgan Memorial was able to move a number of persons, about thirty, onto that program, persons for whom there had been no funding to cover the costs of their services. In addition, in 1975, Jewish Vocational Service of Boston Board of Directors voted to drop its sheltered workshop program. Morgan Memorial was asked by the Rehabilitation Commission to pick it up. After negotiations with Mr. Jerry Goldstein, Executive Director of JVS, nearly fifty clients, four staff, a series of subcontracts and equipment were

transferred to Morgan Memorial. The Extended Employment program was housed on the second floor of the East Berkeley Street warehouse building. In addition to the staff, contracts and equipment, a fee to cover certain program costs was negotiated with JVS for one year. This transition was well planned and executed by the staff of both organizations. Clients involved did not lose a day's program, and the Morgan Memorial staff involved spent considerable time at JVS weeks prior to the transition to become familiar with the clients and allay any fears which might arise concerning the transfer.

1977 A Year of Major Change

As financial and operation conditions did not improve, especially at the end of the first quarter of the year, the Board of Directors of Morgan Memorial began to seriously question the leadership of the organization.

The April 20, 1977 Executive Committee of the Board of Directors' Meeting Minutes reflect the crisis situation:

President John Dolan reviewed the staggering loss of 1976 in Goodwill Industries and continuing losses in January-February-March of 1977 resulting in critical cash flow situation and deficiencies in management. To face up to this serious financial problem the following consultants of Goodwill Industries of America have been consulted for analysis and recommendations: Martie

Hopkins...marketing,...Robert Watkins
...administration and management,...James
Timmons... Transportation,...Dennis
Pastrana...financial management....

President Dolan announced that he and the other officers were meeting weekly with members of the Board Committees and Staff to become oriented to the complex problems and policies of the agency....¹⁷

As operating results did not improve in the second quarter, a management consultant from the firm, Beesley and Gendron was hired by the Executive Committee on August 4, 1977, was brought in to examine the organization and to determine needed changes. At the same meeting, the consultant, Mr. Richard Gendron was placed in full control of the agency "with complete authority normally delegated to an Executive Director". He began to institute a series of studies, procedures and changes to gain control of the organization.

In the process, Rev. Henry E. Helms retired as Executive Director, opting to serve the organization in what was his well demonstrated strength, fund raising/development. He served admirably in this capacity until his full retirement in 1982. Rev. Helms has not really retired as of this writing because he is now the world-wide ambassador of Goodwill, travelling to all parts of the country and the world speaking on behalf of Goodwill. The balance of his time is spent on a new found passion, Literacy. He has recruited and trained nearly 400 volunteers who teach reading in every institution in Massachusetts.

On November first, 1977, Mr. Dennis R. Midgorden began as Executive Director of Morgan Memorial Goodwill Industries. The situation at the time of his arrival was financially grave. There was about \$250,000 owed to the Commonwealth of Massachusetts for Unemployment Compensation Insurance charges not paid. Federal withholding taxes in the amount of \$100,000 had not been paid, about \$285,000 was due back to restricted funds and there was no operating capital. Among the very first things that Mr. Midgorden accomplished was a complete reorganization of staff.

The organization was divided into three divisions, grouping specific functions under an individual division director. Administration and Finance encompassed all accounting and fiscal functions as well as personnel. Industrial Operations incorporated all contributed goods functions from collections to retail sales, food services, and the building and equipment maintenance functions. Human Services included the rehabilitation programs at Boston, Northshore and Worcester, Charles Hayden Goodwill Inn School for Boys, Fresh Air Camps, Volunteer and the Chaplaincy programs.

Initially there were a series of crisis management meetings with senior staff and Messrs. Midgorden and Gendron in which planning was begun, reviewed and initiated. Mr John Dolan, Chairman of the Board was intimately involved in these

decisions with at least weekly meetings (and frequently more often) between Mr. Midgorden and him.

Severe cutbacks were needed if the organization were to survive. In November and December of 1977 there was a layoff of twenty seven persons, many of whom had been long time employees. The printing department, in existence since Edgar J. Helms days was closed because it was not cost effective. A mattress and furniture manufacturing operation on the second floor of the Berkeley Street building were replaced with the subcontract operations formerly housed in the warehouse.

Cash was in very short supply, so it was determined by the Finance Committee and voted by the Board of Directors that an operating capital loan was badly needed. \$250,000 was borrowed at market rates, secured by the Small Business Administration. The loan was made at market rate rather than at three percent interest (HAL 1 program) because the then Treasurer, Mr. Wayne A Sutcliffe, believed that it was "good discipline which the organization needed in its fiscal affairs." That decision was among the poorest made at the time because interest rates soared to nearly twenty percent in the early eighties. Edgar's dictum: "Pay as you go, or you don't go!" had been overlooked for many years.

While there had been senior staff meetings for many years in the organization, under the leadership of Mr. Midgorden the quality of the meetings changed dramatically. If one were to create a sociogram of the prior meetings there would be

evident interactions between the group leader and each person in the meeting, however there was little interaction between the peers without the direct interaction and intervention of the leader, indicating that the meetings were a series of diads. In the Midgorden meetings the diads quickly broke down into free flow of interaction around the meeting. Communications and interactions became much more free flowing, something that facilitated the beginnings of the strategic planning process which was to take formal shape in two to three more years. The change in management style, planning and the "crisis to overcome" were factors that quickly melded the staff into a planning unit.

The Industries which had been a major cause of the financial problems needed substantial methods change. Principal among the changes needed was the collection and processing of materials. Although the subcontracted pick up service was less costly than the former method, materials handled in this system were frequently destroyed by the mechanics of the system, designed for bulk trash handling, or the weather. Pounds of material per unit costs were reduced dramatically; however, useful goods from collections was also reduced, and the cost to cull resalable materials was very high when compared to all other Goodwills. The major change initiated here was to change to an attended donation center system, using a twenty seven foot trailer with a person at the trailer collecting and presorting donations of materials. The

system was initiated in Colorado Springs, Colorado by Mr. Gerald R. Stickney. On the surface it appeared to be a system that was more costly and less productive of goods for resale. Mr. Stickney had not only excellent documentation of the reduced collection costs, but also was able to present a most cogent increase in sales scenario based on a system that actually is far more efficient and effective than previously developed collection methods.

At the outset it would appear to be far more costly and far less effective than the former methods. The concept was researched through other Goodwills who had made the change, planned to supplant the bulk handling system, and implemented in 1979.

By 1980 the Industries losses were radically reduced.

Program Impacts 1977 - 1982

The severe financial situation had caused the Board of Directors of Morgan Memorial to adopt a policy in early 1978 that stated "There can be no new program undertaken which negatively impacts upon the cash flow of the organization". In the board vote to establish Day Habilitation programs in 1979, specific language is attached to the vote:"...that timely payments or some other such funding mechanism be in place at the start of the program so that Morgan Memorial's cash flow will not be effected."¹⁸

This could have been the end of substantial program development, but it was not.

While the policy was perceived as a major hurdle by Human Services Division middle management, it was not a deterrent. It became an educational point for human services administrators to understand the function of money within program constructs, and to truly understand the concept and practice of cash management. This is evidenced by the program start ups in the four years following the policy. The first project undertaken was a National Industries for the Severely Handicapped (NISH) janitorial contract for the Veterans' Administration Outpatient Clinic in Boston. This was a \$175,000 undertaking with a capital investment in tools and equipment and initial payroll costs of nearly \$24,000.

After discussing the project with NISH officials in New York and Washington, it was discerned that there were some unutilized Rehabilitation Services Administration funds in the amount of \$24,000 which might be made available to NISH on a grant basis to start up projects. Very shortly, the funds were made available, and the program began in 1979 with no cash drain on the organization, and providing Morgan Memorial its first twelve community based employment and training slots.

In 1979, because of deinstitutionalization, the Commonwealth of Massachusetts had come to Morgan Memorial to provide Day Habilitation Services to severely and multiply

developmentally disabled persons. Planning for the inception of these programs included "planning and training grants", essentially start up monies to offset cash flow problems as had been anticipated by the Morgan Memorial Board. There were to be eight program starts in that fiscal year, and Morgan Memorial was asked to begin two of the eight. Boston received its "P&T" grant, however there were not sufficient funds to begin services at Beverly. In planning for these services, Morgan Memorial was adamant that both programs start simultaneously because each facility had chosen a different program model, and the organization desired to determine which model was the more effective. When funds were not available to the Beverly operation, contingency plans were called upon which included the transfer of "state blocks", salaries, from the Hogan Regional Center to Morgan Memorial in Beverly until the first Medicaid payments could be received. This meant that the entire Beverly Day Habilitation Program Staff were state employees for the first six months of program operation. Funds for rent and utilities came from left over "P&T" funds.

The planning for this contingency had been developed by Mr. Jonathan A. Odence, Director of Northshore Goodwill Industries, his staff, and the central and regional office staff of the Department of Mental Health, Mental Retardation Bureau, particularly Ms. Bonnie Resmini and Ms. Lee Vorderer. While there had been substantial informal planning between

Morgan Memorial and its vendor agencies in the past, this was the first evidence that planning had reached a level of dealing with contingencies unanticipated in the initial process - playing out "what if" scenarios.

In addition to the usual Program Committee review of this undertaking, the Morgan Memorial Finance Committee also reviewed the fiscal aspects, and the Director of Human Services was required to make a personal presentation to the Chairman of the Board, Mr. John A. Dolan who was unsure about this proposed new undertaking. The combined commitment, Boston and Northshore, for the contracts was in excess of a half million dollars per year, and the addition of some eighteen to twenty new staff, most of whom were well paid allied health professionals. The Boston contract began August 13, 1979, and the Northshore was delayed until September, due principally to site renovations.

In the second year of the Day Habilitation Programs, questions began to be raised, principally by the Executive Director, about the appropriateness of Morgan Memorial's work with this very severely disabled population. Concerns expressed in terms such as, "Several years ago we agreed that we were not a warehouse for handicapped people. These new programs appear to be just that all over again." and "The genius of Morgan Memorial has been in its transitional vocational programs. These programs appear to be just the opposite".

Dennis R. Midgorden in his memorandum to the Rehabilitation Committee stated:

"...At the heart of our service programming is vocational services of all kinds. Accompanying these are certain psycho-social needs which must be met. Vocational services will never go out of vogue and if quality programs are provided by Morgan Memorial Goodwill Industries we will always have more people to work with than money or talent available.

We must look at social development programs very carefully. These programs must be provided in some place in the community. However, I feel they should never be considered as priority over vocational and should primarily be adjunctive and supportive...."¹⁹

These sentiments of the Rehabilitation Committee Chairman, Dr. David Hershenson, and Executive Director Dennis R. Midgorden became more than simple musings when, after a series of meetings with all involved staff a major policy statement was drafted by the Program Committee for adoption by Morgan Memorial in 1982. The policy statement adopted as a Board Resolution in May 1982 incorporated the above sentiments. It stated: "The genius of Morgan Memorial since its founding has been its ability to provide transitional vocational programs for large numbers of people. It is the policy of this agency that all undertakings in program shall have this transitional nature to them."

While this was a very clear statement, there was room for substantial interpretation, particularly around the word transitional. The definition finally arrived at was, "Transitional meant progress toward independence by an

individual as measured by the attainment of mutually (case manager and client) agreed upon goals and objectives which lead ultimately toward independence."

In operational terms it became a requirement that all persons in Day Habilitation must transition to a higher level program within three years, (that was subsequently changed in 1986 to four years as more severely involved persons entered program.)

While this appears to be an innocuous policy decision, it became another determinant in all rehabilitation programs initiated between 1982 and 1989, and became incorporated into the organization's mission statement which evolved during the strategic planning process.

Hayden School

With the retirement of Dr. Emil M. Hartl from his position of Director of the school in late 1977, Mr. Harold Smith was promoted from Associate Director to Director, and with the divisional reorganization, Hayden School reported to the Director of Human Services. Under Harold Smith's leadership, the early neighborhood and racial problems which confronted black youth at the school in an all white neighborhood were greatly overcome. His work with the Popes Hill Neighborhood Association and the local Catholic parishes are a model in community organization and integration.

Mr. Smith and his wife Sareba left the School in December 1979, he to accept employment at the University of Rhode Island as a special assistant to the President for minority affairs, and she to the Kingston Public Schools as Director of Special Education.

Mr. Joseph A. Schechtman was appointed Director of the School on December 24, 1979. At the time he assumed its leadership, the census at the School was at a low of twenty-two boys, and it was operating at a deficit of more than \$100,000 per year. The Board of Directors of Morgan Memorial was seriously considering the closure of the School because of the severe financial drain it caused on the parent agency. Mr. Schechtman's charge was to "Turn it around". The plan at the School was relatively simple: restaff, retrain, and recruit (students). In late 1981 and early 1982 there were a series of meetings between the Superintendent of the Lindemann Mental Health Center, Mr. Jeffrey A. Keilson and Morgan Memorial staff to plan and develop a community based program for adolescents who were housed in adult mental health hospital wards. From this planning evolved the Hill Top Program, a residential treatment program for twelve young adults aged 18 to 22. As with the Day Habilitation start up, there were Planning and Training monies secured and the program began in 1982. This program constituted a major departure from the traditional all male programs at the school because it was coeducational. For the first time in fifty

plus years, services for females was being offered at the school. It ran successfully within Hayden for two years until Hayden staff discerned on followup that of the twenty persons successfully discharged from program, all twenty had come back into institutional care as adult inpatient mental health services consumers. In 1984, Hayden School and Morgan Memorial refused to renew this contract which had constituted fourteen percent of Hayden's revenue because the outpatient supporting services stated to exist for persons discharged from program were never implemented. It was believed by Morgan Memorial that it should not be party to this program fragment. By 1983, the School was showing a surplus from operations and contributing to the overhead of the parent organization, serving more than fifty youngsters daily in its residential, treatment and educational offerings.

In late 1983, after nearly a year of planning and negotiations, another new program was added to Hayden School, the Hearing Impaired Program for emotionally disturbed deaf young adults. Prior to Hayden's establishing this program, the Commonwealth of Massachusetts was spending more than \$150,000 annually on each of these youngsters from Special Education funds. The Hayden program was established to provide similar services at less than half of the cost and in proximity to the youngsters families.

Fresh Air Camps

In 1979, Mrs. Joanne Hoops was appointed Director of the Camps. She had served for nearly five years as secretary to the Director of the Camps, had displayed the organizational and administrative qualifications essential to directing this operation. At the time of her appointment, Mr. David Schubert, an architect and Board Member of Morgan Memorial was appointed Chairman of the Camp Committee. He was appalled at the physical condition of the buildings and grounds at South Athol. With his committee and staff an assessment of the facility was done. Many buildings were in need of major repairs - roofs, structural repairs, and mechanical systems. Funds for effecting repairs were in very short supply; however, a plan was devised which incorporated CETA labor combined with timber cut from the 500 acres of forest at the Camp to begin rebuilding the facility. A five year plan of reconstruction and rehabilitation of facilities was created in early 1980. During that year and each subsequent year, selective cutting of saw logs for the Camp's lumber needs was effected. More timber was cut than the Camp needed, so that the logger and saw mill operator could receive compensation for their work. The initial cruise, inventory and cutting plan, was supplied by the University of Massachusetts Forestry Program.

With the plan created, foundations were approached for financial assistance with the rehabilitation project. Nearly \$50,000 was raised annually to provide those improvements which could not be obtained through the barter system. Of the thirty four buildings at risk in 1979, two were lost due to decay, and the balance have been wholly or partially restored. The most notable restoration is the "House by the Side of the Road", summer residence of the Helms family at Camp, and prior to that, the parsonage of the South Athol Methodist Church. The house was built about 1810 as the home of a sawyer who had set up a mill on the site of what was later to become Morgan Memorial's rug factory. The house had great significance to the residents of South Athol. It is currently used as the Camp Director's home and houses the Camp Helms Museum.

Strategic Planning in Morgan Memorial

While Dennis R. Midgorden can be credited with bringing planning into the operations of Morgan Memorial Goodwill Industries, the planning done from his arrival in 1977 to his attendance at Delegate Assembly in 1982 was for the most part very short term and crisis oriented. With the advent of Rear Admiral David M. Cooney (USN ret.) to the office of Executive Director of Goodwill Industries of America, came the birth of

modern day strategic planning. Cooney's presentation at Delegate Assembly clearly was more effective or better timed than that of Oliver Friedman many years prior because Mr. Midgorden returned from the Assembly that year determined to institute this process. He began almost immediately in the summer of 1982 requiring strategic assessments by all parts of the organization. The fall retreat at South Athol was dramatically changed from a staff development emphasis to planning. At the end of the three day session, a complete assessment of the strengths, weaknesses, opportunities and threats to the organization was completed. The assessments were done on the entire agency and by each operating department. Through the fall and winter of 1982, Mr. Midgorden held twenty seven separate group meetings with all Morgan Memorial personnel at their place of employment. A plenary session was held in which the needs of the agency were prioritized.

Certain items such as provision of health insurance for all employees, development of a wage and salary system and other administrative matters were delegated to small groups of staff to handle and report back to the senior staff. The greatest need evidenced by all members of staff was for physical facilities. Hayden School was shop worn, furniture for its students in great disrepair. Of all the needs, that which gained the support of the entire staff was the need for a new facility to replace headquarters at 95 Berkeley Street, Boston.

At the 1983 fall planning conference in So. Athol, progress reports indicated that the concerns for facilities had been sufficiently completed or were nearing completion in all areas except for the Boston plant. With the Board of Directors present at the sessions, this became the major priority.

Realizing the organization had neither the capital reserves nor the operating surpluses to undertake a then estimated five million dollar project, it was determined to seek professional consultation to determine the feasibility of raising sufficient funds to undertake a building project. Ketchem Inc. of Pittsburg, Pennsylvania was engaged to do a feasibility study for the project the following month, October 1983. The final report of the study was delivered on November 29, 1983 indicating that a \$3,000,000 capital campaign would be feasible, but difficult primarily because of the low public profile of the organization and the lack of well known persons on its Board of Directors.

The planning mode established here became a standard operating procedure in all segments of the organization, eventually. Each department was required annually, prior to budget, to create an operating plan which assessed the prior year's performance, noted changes in its environment with attendant impacts, and forecast objectives for attainment in the subsequent year. The fiscal forecast then became the

financial expression of the flow of resources through the organization in pursuit of the established objectives.

Acceptance of the "new methods" was not universal and not instantaneous. Certain department heads spent considerable time with their staff personnel developing annual plans. Others, most notably older, longer term professional staff perceived the process as another "dog and pony show" or "continued show and tell".

While they clearly recognized the need for planning in the case management process of each client's program, they were unwilling or unable to recognize this as a valid use of their time as a department head. By 1985, this attitude had been changed as it became apparent that those who had invested the time with their staff were accomplishing what appeared to be more with substantially less effort.

Effects of Planning on Human Services 1983 - 1989

The first visible effect of the process was a revision of the by laws of the corporation at its annual meeting March 10, 1983 in which the purpose clause was modified:

" It shall provide rehabilitation services, training, employment, and opportunities for personal growth as an interim step in the rehabilitation process for the handicapped, disabled and the disadvantaged who cannot be readily absorbed in the competitive labor market or during such times as employment opportunities for them in the competitive labor market do not exist. By the inspiration of religion through the skillful use of techniques of rehabilitation, social work,

life guidance, evaluation, training and useful employment, this Corporation shall seek to assist the handicapped, the disabled and the disadvantaged to attain the fullest development of which they are capable."²⁰

As a result of the continuing planning process a revised mission statement was adopted by the Board of Directors on January 11, 1984 which states:

"Morgan Memorial Goodwill Industries, Inc. will actively strive to achieve the full participation in society of disabled people and other individuals with special needs by expanding their opportunities for growth and improving occupational capabilities, while maintaining their personal dignity.

The principle (sic: principal) emphasis of Morgan Memorial Goodwill Industries is, and should continue to be focussed upon assisting children, youth, adults who, because of some limitations, (physical, mental, emotional or social) have difficulty succeeding in other more traditional educational, vocational, training, or employment settings.

To accomplish this mission Morgan Memorial Goodwill Industries will provide rehabilitation services, training, employment,²¹ education and opportunities for personal growth.

The changes in the purpose clause and mission statement are now substantially more focussed upon the actual work of the organization, where as in the past, wording has been very vague, essentially saying "do good avoid evil". The impact of transition, interim and the inclusion of Dignity also lend some notes of movement and values in the organization. While the statements had been well operationalized for many years in the agency, this was the first legal statement so framed. The effects of the Program Committee and the planning process

expressed themselves in the legal adoption of these two elements.

Perhaps the most concrete evidence of planning in Human Services for the final portion of this era is demonstrated in budget growth.

Division of Human Services Revenue and Expenses
(direct expenses only - no public support)

	1983	1985	1987	1988
Revenue	\$3,495,147	\$4,403,634	\$5,935,859	\$6,511,155
Expense	\$3,415,470	\$4,595,124	\$5,599,421	\$6,192,560
Net	\$79,677	(\$190,490)	\$336,438	\$318,595

A more detailed report by program location is attached as appendix A, prepared by William T. Mc Carriston, Jr. in February 1989.

The growth of Human Services with the implementation of planning over this five year period indicates a doubling of revenues and a tripling of direct net to the organization. While these figures include all costs associated with the Chaplaincy program, Volunteer Program, and the net deficit from the Camp program, none of the funds raised from the public are included in these figures, an amount equal to another \$400,000 annually.

One might compare this with the period from 1922 to 1932 when the organization had developed a plan, utilizing the line level personnel in its formulation and implementation. As previously stated, this plan was the vehicle upon which Morgan

Memorial rode out the depression. Likewise, the process in 1982 and 1983 which was carried on for a number of years carried the organization into full utilization.

The importance of planning for Human Services development at Morgan Memorial was recognized by Goodwill Industries of America when the Vice President of Human Services was invited to present a paper at the National Conference of Executives at Little Rock, Arkansas, February 6, 1985. The paper, "Development of a Continuum of Services, A Multiple Funding Approach to Rehabilitation Program Development", states,

" In summary then, you first ascertain the needs in your community, next find the piece of the action that is in keeping with what you do best. Third is selling your services using all marketing tools at your disposal, and finally and perhaps most important, monitor closely what is happening with your services. Are they doing what they purport to do? Are they relevant? Are they current? In conclusion, none of the above is able to take place without strong direction from a Board and firm commitment from the Chief Executive of an organization. There is no substitute for planning in this process. It takes time and risk taking. If an agency has done a good assessment of its place in the community, concretized its mission/purpose statement, properly marketed its programs and services, service sales can boom!"²²

1986 Another Major Change

As previously stated, the Strategic Planning process resulted in a complete focus of the efforts of Dennis R. Midgorden on the new building and capital campaign, beginning in November 1983. The plan developed to remedy perceived

weaknesses in the organizations Board of Directors and its public image, coupled with the planning of new construction began to consume more and more of his management time. 1984 was another poor year for Industrial operations with losses in excess of \$400,000. The Vice President of Industrial Operations resigned in early 1985, and Mr. Midgorden split the oversight functions of that job between his remaining Vice Presidents and himself. Sales, subcontract and food services were given to the Vice President of Finance, Production to the Vice President of Human Services, and he took transportation and material handling. This was a response to an immediate crisis which was to be short term. It was not until May 1, 1986, more than a year, that a new Vice President of Industrial Operations was employed.

At the November Board of Directors Meeting in 1984, there was a policy decision made that is not reflected in the minutes of that meeting. The Board stated that Morgan Memorial must now begin to wean itself from dependence on wills and bequests for operating funds. Rather, these funds should be used for capital debt retirement or for capital improvements, or placed directly into the endowment funds. A cap of \$400,000 on the use of bequest monies was placed on 1985, with the cap decreasing each year by fifty thousand dollars until the amount was at zero.²³

As a formal Board vote, this was passed with a repayment schedule for \$419,000 at the May 28, 1986 Board of Directors' Meeting.²⁴

The year 1985 was so poor financially that more than \$819,000 from bequests had to be used to cover deficits in Industrial Operations. By May of 1986, the year's deficit from Industrial Operations has passed \$500,000. On request of the Board of Directors, William T. Mc Carriston was asked to assume day-to-day management of the entire agency except Public Relations and the Development Office. Mr. Midgorden was placed in charge of both internal offices, the beginning Capital Campaign and construction of the new building which began in the early spring of 1986.

On July 6, 1986 Mc Carriston was named First Vice President and Chief Operating Officer. At the time of his appointment, Mr. Anthony J. Volk had very recently been named Vice President of Industrial Operations. Mr. Robert Falconero had been Vice President of Administration and Finance since the passing of John B. Determan, Controller, in 1982.

The losing situation in the Industries which existed throughout late 1984, 1985 and now into 1986 had accelerated. The losses incurred in the Industries in January 1986, 111% on each revenue dollar had accelerated to 125% by July of that year. The deficit from operations had increased to more than \$750,000.

The three Vice Presidents with what staff support was available immediately began a short term and long term business plan which included closing costly store locations, drastic changes in material handling and collections processing, and major expansion of retail operations. The plan called for immediate closing of two stores, opening two others in that year. It projected store sales to rise from the 1986 \$1.2 million to \$4.4 million over the next three years. The sales plan was predicated on the amount of material collected and processed for resale.

At the time of its implementation, scarcely 3000 garments per day were being prepared for sale. By the end of the second year, more than 10,000 garments were processed each day and sales were approaching \$3.3 million dollars. Costs per revenue dollar had dropped from the previously stated 125% to a profitable 84% by late in 1988.

The plan created between July 6 and July 30, 1986²⁵ was not only instrumental, but also essential for Morgan Memorial to negotiate a line of credit of \$500,000 in December 1986 with the Shawmut Bank of Boston. The results of the planning process, long term, provided a basis for cash and capital planning outside of the Capital Campaign. The line of credit was absolutely essential because the organization had no cash and major obligations to meet if it were to continue operating.

This apparent digression is inserted to demonstrate that even if a segment of an operation is operating well, its existence can be threatened by another part of the same organization. Human Services, as previously stated was contributing substantially toward the overheads of Morgan Memorial. However, lack of cash to meet payroll could have killed or seriously impaired that operation as well.

The absence of or inattention to planning in the Industrial Operations Division from 1984 to 1986 had not only resulted in financial disaster, but a decay in the middle management structure of the organization which saw the most qualified managers leave for lack of support and direction.

By December of 1986, the losses had been abated, and the loss for the year grew to no more than \$750,000. The total agency revenue for the year remained just over \$9,000,000 where it had remained since 1984. 1987 was a break even year, using the allowed \$350,000 bequest monies. 1988 was also break even, using \$300,000 in bequest monies.

The overall agency budget had grown from the previously stated \$9,000,000 to \$13,000,000 in 1988 with projections for 1989 in excess of \$14,000,000.

In April of 1987, Mr Mc Carriston was asked to assume oversight of the construction of the new facility at 1010 Harrison Avenue. The facility was completed and occupied in mid-August of 1987.

On March 1, 1988, Dennis R. Midgorden retired from Morgan Memorial, and William T. Mc Carriston, Jr. was named interim President as a national search was begun for a new President.

Program Growth 1986 TO 1988

Programs within the Human Services Division of Morgan Memorial appear to grow in half million dollar increments from 1986 to 1988.

Revenue for 1985 was \$4,404,634 and in 1988 was \$6,511,155. There was continuing growth in 1989 to \$7,621,354.

During this period there were increasing demands for services to more and more severely disabled individuals. At the Hayden School, in addition to the Hearing Impaired Program added in 1983 and the Assessment Unit added in 1985, a Crisis Intervention Unit for Hearing Impaired was opened on June 1, 1987.

The Northshore programs increased by adding additional clients to each of its contracts because, Mr. Thomas Shaheen and his staff had done extensive planning for "Workshop Conversion", placing a maximum number of clients into community based work sites.

Similar planning took place in Boston with similar results. Contracts with the Department of Mental Health were expanded as more clients became "community based. In addition, because of the success with severely developmentally disabled,

a pilot program was started in 1985 for adults who were chronically emotionally disturbed. This pilot of three persons was so successful that the program was expanded to fifteen in 1986 and again in 1987. This led to the award of the supported employment program for emotionally disturbed persons (Access Program) to Morgan Memorial in mid 1988 and a contract with Public Welfare on March 1, 1988 to train and place AFDC recipients under the E.T. Choices Program.

A complete listing of contracts for services in effect through the end of 1988 is presented in appendix B.

The development of programs through service contracts with various government agencies, while restricted for many years to vocational rehabilitation organizations only, can be said to be coincident with the wave of deinstitutionalization in Massachusetts. The programs did not, however, simply flow to Morgan Memorial. What began as an informal venture in assessment of the environment for the planning process in the early eighties became a much more formalized process at Morgan Memorial.

State level, regional and local government bodies who were charged with provision of services to specific populations became targets for assessment and trend analysis, as well as conduits for marketing program offerings.

Staff were specifically assigned vendor agency responsibilities usually following this pattern: Vice President of Human Services, the state level planning and

advisory boards which usually included the decision makers at the state level. Department directors were assigned the regional office staff and their planning and purchasing strategies. Department heads were assigned the local office management, with the line service delivery personnel relating to their counterparts in the case management/referral system.

Internally, nearly all significant meetings with vendor or potential vendor agencies were reported in which there was an environmental change such as a new program idea under consideration, some unmet need recognized. Staff at all levels had input into the development of a potential new program if it were deemed by the staff to be an offering that could be reasonably made within the resources of the organization. A formal plan of action including dates, resources needed and projected benefits would be constructed for department head review and comment. This review and comment would be cast against the goals and objectives set for that year's plan. Frequently, as staff became more sophisticated, program plans would be developed many months prior to implementation, presented to the Vice President of Human Services and presented to the Board of Directors through the Program Committee.

In this manner, program personnel and administration had the time to work out details of the plan which might be overlooked in the usual time frame from a request for

quotation solicitation to proposal submittal. The board restraint on no new programs which negatively impact on cash flow was modified to permit as much as a 45 day cash turnaround as the organization's cash flow improved in the later 80's. This removed a major barrier to getting into newer program offerings through 1987 and 1988

By 1989 Morgan Memorial had become one of the larger organizations providing services in eastern Massachusetts, and the second largest Goodwill in the world in program revenues.²⁶

Conclusions

In retrospect over the many pages of this document, it becomes apparent that as a case study of one organization's growth in human services, that the times in which the organization or key persons in the organization: the decision makers, board and senior staff, expended the time necessary to plan the next year's activities clearly, and to plan for multiple years, the organization prospered financially and in services rendered to people. In this work there are significant numbers of times when crisis caused by a lack of planning could easily have caused Morgan Memorial to cease to exist. Whether it was the auction of the old church, or the line of credit so sorely needed in 1986, each event lead those in charge to begin planning.

More frequently than not, planning was instituted by a new chief executive as a means to salvage a threatening situation.

While there is an element that might be described as chance in the organization's growth over the past few years, or perhaps opportunism might be charged, it is the conviction of this writer that the definition of the organization, its purposes, values and methods which came from the early eighties process, is the key to the successful recent growth of the organization.

The annual operating plans prepared by each department prior to the budget process at Morgan Memorial are essential.

In late 1988 the need for a new strategic plan at Morgan Memorial was realized, since the major objective of the 1983 plan, the new headquarters building, was now complete. This process was begun in August 1988.

On October 23, 1988 it was announced that the Board of Directors had made its selection for President of Morgan Memorial Goodwill Industries. Ms. Deborah C. Jackson, Director of the Roxbury Community Health Center became the President and Chief Executive Officer of Morgan Memorial on January 2, 1989.

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A

REVENUE AND EXPENSE SUMMARY
HUMAN SERVICES

	1983	1984	1985	1986	1987	1988
BOSTON REHAB.						
REV.	802,059	908,323	866,175	1,095,679	1,236,022	1,636,852
EXP.	658,152	719,817	765,457	916,299	973,558	1,271,485
NET	143,907	188,506	100,718	179,380	262,464	365,367
NORTH SHORE REHAB.						
REV.	787,239	818,920	838,057	987,833	1,109,700	1,123,862
EXP.	682,673	725,205	733,973	831,554	872,692	923,368
NET	104,566	93,715	104,084	155,616	235,758	199,162
WYDEN SCHOOL						
REV.	1,651,625	2,138,545	2,368,009	2,820,914	3,202,935	3,358,668
EXP.	1,576,310	2,187,248	2,468,135	2,785,907	3,978,880	3,352,918
NET	75,315	(48,703)	(100,126)	35,007	124,055	5,750
FRESH AIR CAMPS						
REV.	84,067	89,073	107,097	124,751	118,691	129,568
EXP.	303,247	362,561	367,004	359,056	393,980	372,185
NET	(219,180)	(273,488)	(259,907)	(234,305)	(275,973)	(242,617)
CHAPLAIN						
EXP.	10,360	15,542	19,267	21,404	30,098	30,556
FISH						
REV.	170,157	215,880	225,296	241,343	268,511	262,205
EXP.	184,728	219,491	241,288	231,097	250,213	242,048
NET	(14,571)	(3,611)	(15,992)	10,246	18,298	26,239
<hr/>						
	1983	1984	1985	1986	1987	1988
REVENUE	3,495,147	4,170,741	4,404,634	5,270,520	5,935,859	6,511,155
EXPENSE	3,415,470	4,229,864	4,595,124	5,145,317	5,599,421	6,192,560
NET	79,677	(59,123)	(190,490)	125,203	336,438	318,595

STATUS OF HUMAN SERVICES
BRIEF

I. Statistics:

PERSONS SERVED

	Boston Rehab.	North Shore Rehab.	Hayden	Camp
1986	438	216	122	1843
1987	468	214	96	2128
1988	577	197	103	2133

COMPETITIVE PLACEMENTS

	Boston	North Shore
1986	27	21
1987	25	19
1988	60	19

OUTCOME EFFECTIVENESS

	Boston			North Shore			Combined		
	Positive	Negative	Per.	Positive	Negative	Per.	Positive	Negative	Per.
1986	288	41	87.5	69	15	82.1	357	56	86.4
1987	256	27	90.5	61	5	92.4	317	32	90.8
1988	NOT AVAILABLE AT THIS TIME								

II. Entire Division: Rehabilitation, Hayden, Camp, Chaplaincy and NISH
Revenue/Expense/Net Combined.

	1983	1984	1985	1986	1987	1988
REVENUE	3,495,147	4,170,741	4,404,634	5,270,520	5,935,859	6,511,155
EXPENSE	3,415,470	4,229,864	4,595,124	5,145,317	5,599,421	6,129,560
NET	79,677	(59,123)	(190,490)	125,203	336,438	318,595

III. Contracts to be RFP'D '90'

Boston Supported Work - MR (RO)
 Boston Extended Employment (1st time)
 Boston Mental Health Activity Program
 Boston Lotus Program (RO to Pos)

Beverly Supported Work MR (RO)
 Beverly/Lynn Extended Employment (1st time)
 Beverly Sheltered Workshop (3)
 Beverly On-Site Employment

Lynn Work Activity Center

MORGAN MEMORIAL GOODWILL INDUSTRIES, INC.
1010 Harrison Avenue, Boston, MA 02119

Laura Roberts, Program Director

FINANCIAL DISCLOSURE CERTIFICATE

Funding Source (Agency/Unit)	Total Funding or Amount of Contract	Type of Services Provided	Clients Served Daily	Program Coordinator	Rate of Reimbursement Unit Cost	Total Contract (Potential Revenue)
BOSTON MRC	\$60,596 per contract	Supported work/MR	4	Brad Day		\$60,596
MRC	Fee For Service	Ext. Sheltered Employment	60	Brad Day	13.65 per day	\$65,000
MRC	Fee For Service	Eval. and/or Training Svcs.	35	Brad Day	32.18 per day	\$152,000
NCB	Fee for Service	As per MRC above	3	Brad Day	32.18 per day	(included above)
DNR (Dr. Solomon Carter Fuller Men. Health Ctr.)	\$233,229.20/year Unit Contract #9630305	Work Activity Program	27	Christa Contois	50.20 per unit	\$233,229.20
DNR (Dr. Solomon Carter Fuller Men. Health Ctr.)	\$91,096.20/year Unit Contract #9630306	Work Activity Program	12	Christa Contois	39.78 per unit	\$91,096.20
DNR (Dr. Solomon Carter Fuller Men. Health Ctr.)	\$59,133.03/year Unit Contract #9630303	Day Activity program	6	Christa Contois	48.32 per unit	\$59,133.03
DNR (Newton/South Norfolk, District 4B)	\$8,452.44/year Unit Contract #9470356	Work Activity Program	1	Christa Contois	39.78 per unit	\$8,452.44
IMH (Harbor Area)	Non Unit Contract \$14,164/year #9640219	Mental Health Adult Workshop Program	3	Brad Day		\$14,164 Annually
DNH (Dr. Solomon Carter Fuller Men. Health Ctr.)	Non Unit Contract \$83,855/year #9630224	Mental Health Workshop Program	12	Brad Day		\$83,855. Annually
MRC	\$35,000/year	Lotus Training Program	N/A	Brad Day		\$35,000/year
MRC	\$131,344/contract	Supported Work/ACCESS	---	Fred Smith		\$131,344/contract
DFW	\$529,388/year	Supported Work/AFDC	120/vr.	Ernest Dulin		\$529,388/year
Goodwill Industries of America	\$29,000	Projects with Industry	---	Marty Gold	29,000/contract	\$29,000
BOSTON - DAY REHABILITATION CENTER						
DFW (Medicaid Division)		Day Habilitation	31	Debra Jacobson Christa Contois	46.61 Low Need/per day 51.37 Moderate Need/per day 64.08 High Need/per day	\$336,306

NB: All contracts run on fiscal year except Department of Public Welfare Supported Work AFDC, expires 2/28/89.

MORGAN MEMORIAL GOODWILL INDUSTRIES, INC.
1010 Harrison Avenue, Boston, MA 02119

Thomas Shaheen, Program Director

FINANCIAL DISCLOSURE CERTIFICATE

Funding Source (Agency/Unit)	Total Funding or Amount of Contract	Type of Services Provided	Clients Served Daily	Program Coordinator	Rate of Reimbursement Unit Cost	Total Contract (Potential Revenue)
NORTH SHORE - BEVERLY WORKSHOP						
MRC	\$52,998.00 per contract	Supported Work		Louise Pelletier	N/A	\$52,998
MRC	Fee For Services	Ext. Sheltered Employment	30	Louise Pelletier	\$16.30 per day	\$105,816
MRC	Fee For Services	Eval. and/or Training Svcs.	11	Louise Pelletier	\$29.95 per day	\$68,634
DNR (Region 3)	\$19,731.20/year Unit Contract #7340206 (Cape Ann)	Sheltered Workshop	3	Louise Pelletier	\$32.75 per unit	\$19,731.20
DNR (Region 3)	\$85,522.42/year Unit Contract #7350316 (Cape Ann)	Sheltered Workshop	13	Louise Pelletier	\$32.75 per unit	\$85,522.42
DNR (Region 3)	\$118,387.20/year Unit Contract #7340307 (Cape Ann)	Sheltered Workshop	18	Louise Pelletier	\$32.75 per unit	\$118,387.20
DNR (Region 3)	\$58,060.80/year Unit Contract #7350329 (Danvers/Salem)	On-Site Work Activity	13	Louise Pelletier	\$24.12 per unit	\$58,060.80
NORTH SHORE - LYNN WORKSHOP						
DNR (Region 3)	\$219,132.21 Unit Contract #7360309	Work Activity Center	38	Cheryl Annesse	\$28.55 per unit	\$219,132.21
DNR (Region 3)	Fee For Service #350381 (Danvers/Salem)	Work Activity Center	2	Cheryl Annesse	0	
MRC	Fee For Service	Ext. Sheltered Employment	3	Cheryl Annesse	\$16.30 per day	\$12,120.
NORTH SHORE - DAY HABILITATION CENTER						
DPW (Medicaid Division)		Day Habilitation	28	Deb Whiten	\$46.41 Low Need/per day \$51.37 Moderate Need/per day \$64.08 High Need/per day	\$325,075
MCB (Medical Ass't. Unit Fee For Service)		Day Habilitation	2	Deb Whiten	As Above	

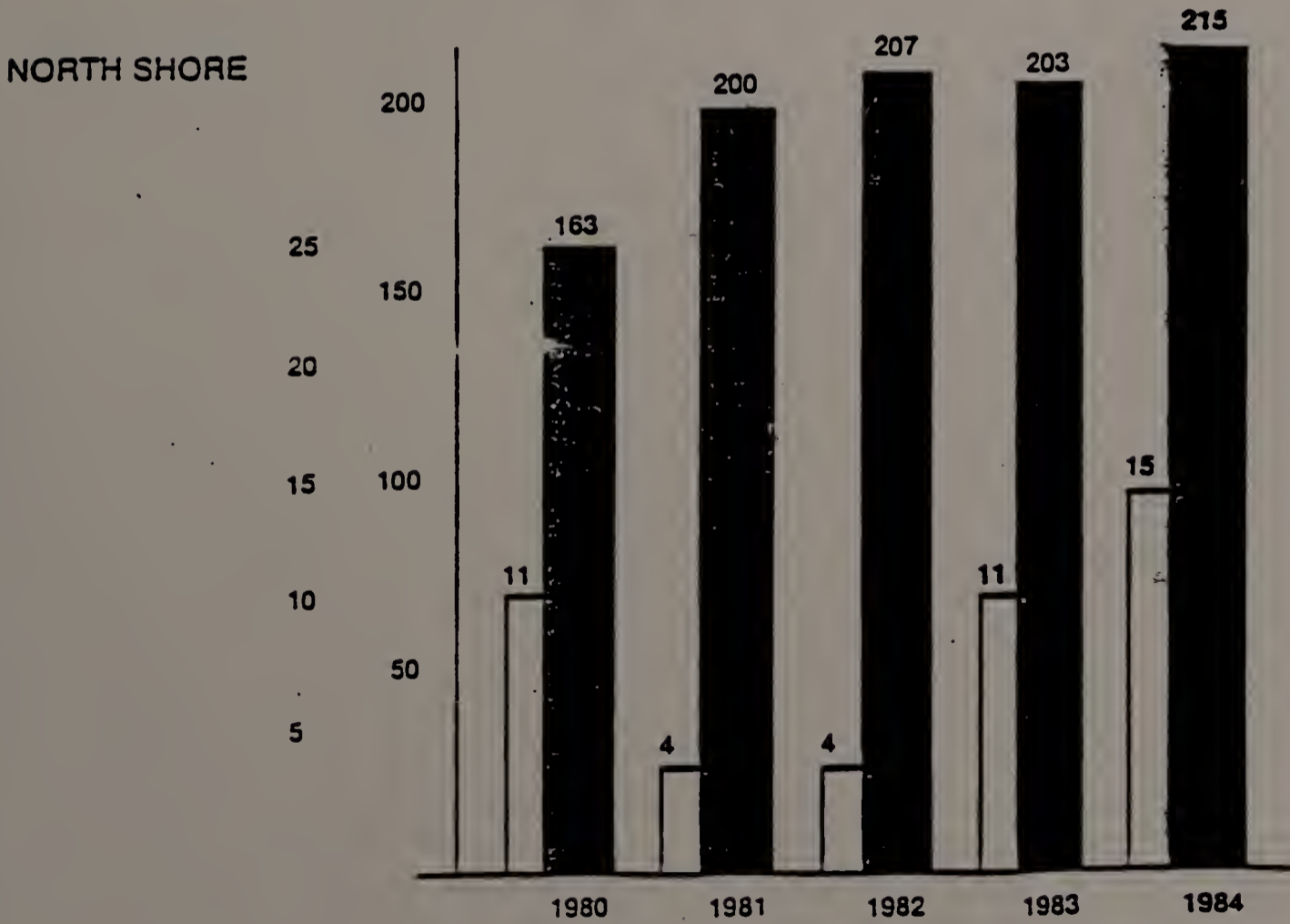
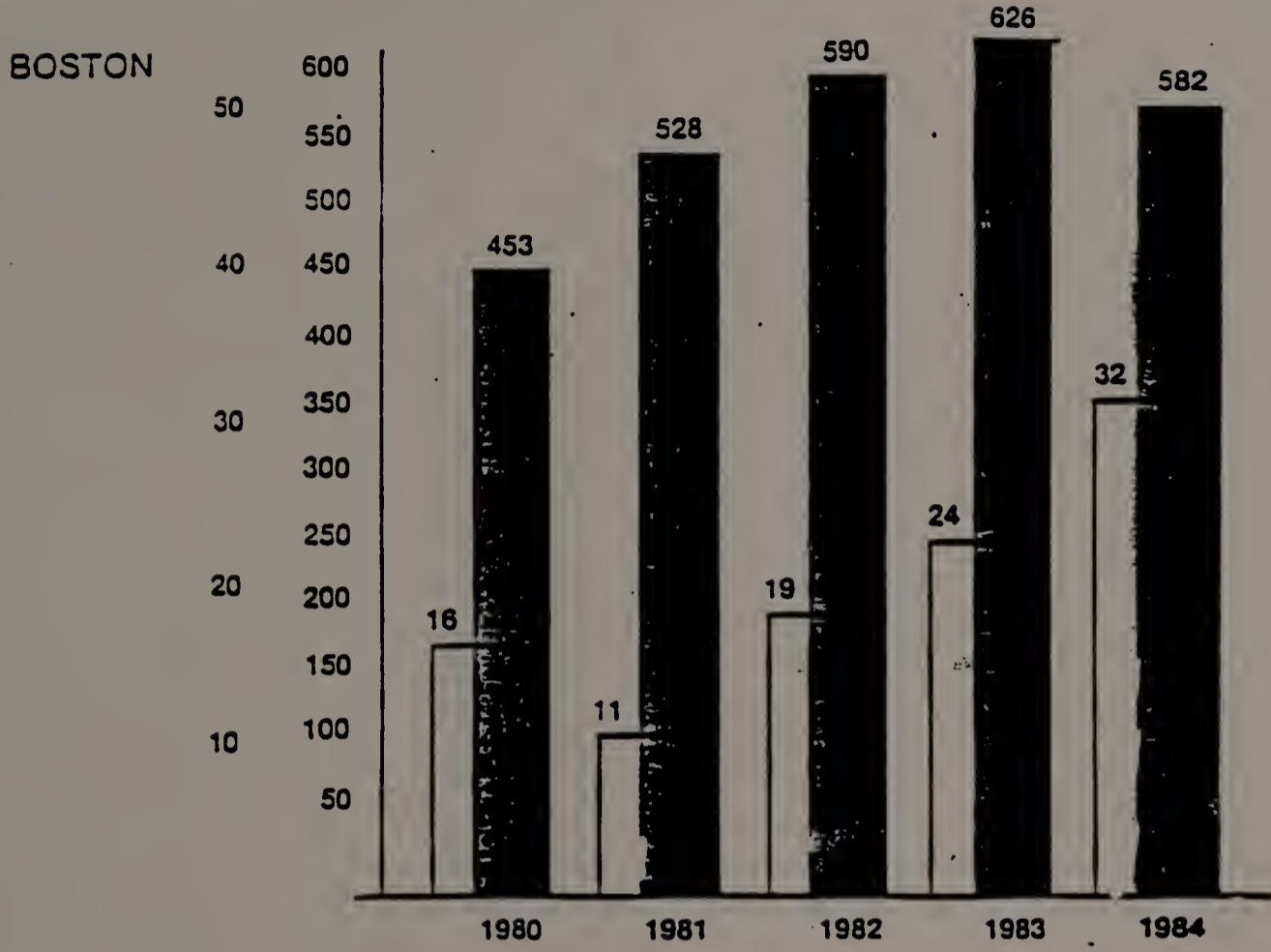
MORGAN MEMORIAL GOODWILL INDUSTRIES, INC.
1010 Harrison Avenue, Boston, MA 02119

Joseph Schechtman, Program Director
Gretchen Brown

FINANCIAL DISCLOSURE CERTIFICATE

Funding Source (Agency/Unit)	Total Funding or Amount of Contract	Type of Services Provided	Clients Served Daily	Program Coordinator	Rate of Reimbursement Unit Cost	Total Contract (Potential Revenue)
<u>CHARLES HAYDEN GOODWILL IN SCHOOL</u>						
DSS	Fee For Services	Residential Treatment & Education	27	Marcia Fowler	\$71,566 per child per year	\$1,932,282
DYS	Fee For Services	Residential Treatment & Education	27	Marcia Fowler	\$71,566 per child per year	
Dept. of Education (776)	Fee For Services	Residential Treatment & Education	27	Marcia Fowler	\$71,566 per child per year	
DMH	Fee For Services	Residential Treatment & Education	27	Marcia Fowler	\$71,566 per child per year	
<u>HEARING IMPAIRED PROGRAM</u>						
DSS	Fee For Services	Residential Treatment & Education	12	William Corbett	\$88,076 per child per year	\$1,124,912
Dept. of Education (750)	Fee For Services	Residential Treatment & Education	12	William Corbett	\$88,076 per child per year	
Dept. of Education (766)	Fee For Services	Residential Treatment & Education	12	William Corbett	\$88,076 per child per year	
Dept. of Mental Health	Contract No. 262-0762-0407	Crisis Intervention (Support for H.I.P.)	12	William Corbett	\$68,000 per year	
<u>ADOLESCENT ASSESSMENT</u>						
DSS	\$499,655 per year Contract #992-88-11408 (Cost Reimbursement)	Community Residential Services	7	Marcia Santangelo	N/A	\$499,655

Handicapped People in Programs
 (Primary Bar Graph)
 Placements in Competitive Employment
 (Secondary Bar Graph)



NO	NAME	PROGRAM SITE ADDRESS AND PHONE	PROGRAM ORIGINATION DATE	TYPE AND EOHS CODE
1	Day Habilitation Boston	Laura Roberts 1010 Harrison Ave., Boston	8/13/79	3100 Adult Day Habilitation
2	ESEP Boston	" "	1975	80402 Direct Day Care Pr Max. Emplov. Opport
3	E & T Boston	Laura Roberts 1010 Harrison Ave., Boston	1967	80401 Eval & Trng
4	Day Activity, Boston	" "	7/1973	3102 Day Act. Prog:
5	Work Activity, Boston	Laura Roberts 1010 Harrison Ave, Boston	3/1982	3106 Work Act. Prog
6	Bay State, Boston	" "	1/1983	Supported Work
7	Day Activity, Boston	Laura Roberts 1010 Harrison Ave., Boston	3/1978	3102 Day Act. Prog
8	Day Habilitation North Shore	Thomas Shaheen- Morgan Memorial Goodwill Industries Inc,	9/1979	Adult Day Habilitation:
9	ESEP North Shore	140 Elliott St. Beverly, MA 01915	1977	Direct Day Care Pr Max. Emp. Oppor. 80402
10	E & T North Shore	" "	1967	Eval & Trng 80401
11	Sheltered Workshop North Shore	Thomas Shaheen 140 Elliott St, Beverly, MA	1972/1973	Sheltered Wr Prog. 3104
12	Bay State North Shore	" "	7/1982	Supported W Prog.
13	Work Activity, Lynn North Shore	Thomas Shaheen 140 Elliott St., Beverly, MA	1967	Work Activity 3106
14	On Site North Shore	" "	1985	On Site Job Placement
15	Camp	Joanne Hoops 1010 Harrison Ave. Boston	1906	
16	RTE Hayden Inn	Joseph Schechtman 21 Queen St, Dorchester, MA	1932	Res. Treat & Educ CRSI
17	HIP Crisis Hayden Inn	" "	6/1/87	
18	Hilltop Hayden Inn	Joseph Schechtman 21 Queen St., Dorchester, MA	1982	Resid. Trn II, Children S-

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