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Article abstract

When the Carnegie Foundation for the Advancement of Teaching was established in 1905, universities in Canada and New-foundland were eligible for participation in a pension fund for faculty and grants to universities. Canadian universities were quick to seek access to the Carnegie pension plan and for support from the Corporation. Access to both programs came with strings attached, including recommendations of educational studies commissioned by the Foundation, six of which addressed Canadian higher education specifically. As attractive as the prospect of Carnegie support was, it posed a dilemma for many universities and self-regulated professions associated with them in regard of mandate and autonomy. This study investigates how Canadian universities and the professional societies associated with them responded to the studies, found ways to take advantage of the reports, or in some cases make compromises to manage the internal conflicts that arose from them, and finally their embryonic introduction of the concept planned systems of higher education.

THE CARNEGIE FOUNDATION FOR THE ADVANCEMENT OF TEACHING DIVISION OF EDUCATIONAL ENQUIRY AND THE SHAPING OF CANADIAN HIGHER EDUCATION

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Abstract

When the Carnegie Foundation for the Advancement of Teaching was established in 1905, universities in Canada and Newfoundland were eligible for participation in a pension fund for faculty and grants to universities. Canadian universities were quick to seek access to the Carnegie pension plan and for support from the Corporation. Access to both programs came with strings attached, including recommendations of educational studies commissioned by the Foundation, six of which addressed Canadian higher education specifically. As attractive as the prospect of Carnegie support was, it posed a dilemma for many universities and self-regulated professions associated with them in regard of mandate and autonomy. This study investigates how Canadian universities and the professional societies associated with them responded to the studies, found ways to take advantage of the reports, or in some cases make compromises to manage the internal conflicts that arose from them, and finally their embryonic introduction of the concept planned systems of higher education.

Keywords: Carnegie Foundation, educational studies, Canada

Résumé

Lorsque la Fondation Carnegie a été fondée, en 1905, les universités canadiennes et terre-neuviennes étaient admissibles à des subventions ainsi qu'à un fonds de pension pour les professeurs. Les universités canadiennes ont rapidement cherché à bénéficier du régime de pension Carnegie et à obtenir du soutien de la Corporation. L'accès aux deux programmes était assorti de conditions, liées aux « études pédagogiques » commandées par la Fondation. Aussi intéressante et, dans certains cas, aussi nécessaire qu'elle fût, la perspective de soutien de la Fondation Carnegie posait un dilemme pour plusieurs universités en ce qui concernait leur mandat et leur autonomie. Cette étude examine la façon dont les universités canadiennes et les sociétés professionnelles associées ont répondu aux nombreuses études pédagogiques de la Fondation, trouvé des moyens d'en tirer parti et, dans certains cas, fait des compromis pour gérer les conflits internes qui en ont découlé, et finalement, l'introduction embryonnaire du concept de systèmes planifiés en éducation supérieure.

Mots-clés : Fondation Carnegie, études pédagogiques, Canada

Introduction

In 1905, Andrew Carnegie donated funds to create the Carnegie Foundation for the Advancement of Teaching to

provide retiring pensions to the teachers of Universities, Colleges, and Technical Schools...without regard to race, sex, creed, or color...in general to do and perform all things necessary to encourage, up-

hold, and dignify the profession of the teacher and the cause of higher education within the United States, the Dominion of Canada, and Newfoundland. (Carnegie, 1905)

This, in time, became the Teachers Insurance and Annuity Association. Access to the pension fund was tightly restricted to non-denominational and, initially, to non-state supported colleges and universities that also met the Foundation's standards of academic quality.

Six years later, Carnegie established and endowed the Carnegie Corporation, which continued the well-known and less restrictive grant program for libraries and expanded its scope to include direct grant support for universities and colleges, mainly in the area of scientific research. Over the next three decades, the Carnegie Foundation played an important but supranational role in forming a national culture in Canada. The influence of the Carnegie Corporation (and the Rockefeller Foundation) is described well by Brison (2005). From 1906 to 1929, the Carnegie Foundation and Corporation supported Canadian higher education either in the form of direct grants or pension pay-outs amounting to just under \$6 million (\$180 million in current CDN). Carnegie support to universities, museums, art galleries, and public libraries thus played an important role in forming a national culture in Canada (Brison, 2005).

The conduct of Carnegie's foundations in Canada was seen in some cases to be "colonial," "continentalist," or "imperial" (Tippett, 2006, p. 18). For example, a report commissioned by the Foundation proposed the rationalization of higher education in the Maritime provinces into a single system (Learned & Sills, 1922). The proposal was resisted and, finally, after much heated debate, rejected. Reports proposing reform of medical and dental education, however, were adopted by Canadian universities without controversy. Grants from the Corporation were often very specific, for example to support the National Gallery and the Quebec Association for Adult Education. Strings were attached, but they were loose, broadly inclusive, and delegated extensive discretion to the board (Carnegie, A. (1911, November 10). [Letter to Board of Trustees], CUCC). One string, of particular significance to Canada, was Carnegie's personal decision to add \$20 million to the Corporation's endowment to establish a Special Fund to which only Canadian universities could apply. Otherwise, the Foundation and the Corporation treated American and Canadian institutions alike.

The Foundation's pension fund, however, was as contentious and complicated as it was attractive. The strings were tight. It had rules. To be eligible for participation in the pension plan a college had to meet a series of tests to attain *academic standing*, defined as follows:

An Institution to be ranked as a college must have at least six professors giving their entire time to college and university work, a course of four full years in liberal arts and sciences, and should require for admission not less than the usual four years of academic or high school preparation, or its equivalent, in addition to the pre-academic or grammar school studies. (Car-

negie Foundation for the Advancement of Teaching *Rules for Admission, 1906*)

Attached to but not part of the tests and standards for *academic standing* was another rule, one that would prove to be highly contentious and initially open to interpretation: "Institutions which are under control of a sect or require Trustees (or a majority thereof), Officers, Faculty or Students, to belong to any specific sect, or which impose any theological test, are to be excluded" (Carnegie Foundation for the Advancement of Teaching, *Rules for the Admission, 1906*).

Initially in their fervent pursuit of access to the pension fund, colleges and universities paid little attention to or overlooked the fact that the Foundation had a second mandate. Carnegie and Henry Pritchett, the Foundation's president and former president of the Massachusetts Institute of Technology (MIT), from the start foresaw the Foundation as more than a pension fund. Even before the Foundation was fully in place Carnegie and Pritchett were assembling statistics by which to measure college and university performance and planning a series of educational studies to be undertaken by the Foundation (Savage, 1953). The Foundation thus would be an "educational influence" that would deal with "the most far-reaching educational questions and with the most important problems of educational policy" (Pritchett, H. (1905, November 8). [Letter to Andrew Carnegie], CUCFAT). Later, after the Foundation was chartered Congressionally, its scope was expanded beyond the setting and raising of measurable standards to include "bringing in of reasonable unity in our arrangement of educational institutions (Congress of the United States, 1905). Pritchett went so far as to prophesy that the Foundation's contribution centralization and standardization would be greater in the end than the benefit of the pension fund (Carnegie Foundation for the Advancement of Teaching, *Annual Report, 1906*). The rules set for the pension fund made it clear how the Foundation would fulfill its first mandate. How it would fulfill the second was, at the start, unclear.

The Foundation's plans for its second mandate began to emerge in 1908, when Pritchett addressed an assembly of denominational colleges, who had by then come to understand that the Foundation's rules for access to the pension fund were strict, including the prohibition of sectarian control. In explaining this position, Pritchett's told the colleges that they should co-operate, defeat inefficient rivalry, and rationalize systems, and that to do that they had to relinquish denominational control. In 1909, in a strongly worded letter explaining to the

Governor of Ohio why all three of the state's universities' pension applications had been rejected, Pritchett ended by calling on the state to reconstruct its universities "in such wise that their functions may be differentiated and that each be assigned a definite place in a comprehensive and consistent educational system" (Henry Pritchett, H. (1909, June 9). [Letter to Judson Harmon], CUCFAT). Later in the same year the Foundation warned universities that "sheltered" arms-length proprietary medical, dental, and law schools would not be accepted unless the schools were either brought up to the same standards of universities already on the accepted list or cut loose (Carnegie Foundation for the Advancement of Teaching, *Annual Report*, 1909). Here we see the beginning of a hand-in-glove relationship that would go on to define the working interconnection between the two mandates, and between the Foundation and Corporation after 1911.

Canadian universities were quick to seek access to the Carnegie pension plan and for support from the Corporation. Four—Dalhousie, New Brunswick, McGill, and Toronto—were admitted into the pension plan by 1909. By then, however, it had become apparent to all universities, in the United States and Canada, what the rules for admission meant and how strictly the Foundation intended to apply them. By 1911, with the establishment of the Corporation and the appearance of the Foundation's first educational study, it also became apparent that the Foundation's rules and standards were the gateway to Corporation funding. This study will investigate how Canadian universities and the professional societies associated with them responded to the Foundation's several educational studies, found ways take advantage of the reports, or in some cases made compromises to manage the internal conflicts that arose from them, and their impact on the balance between sectarian and secular, and finally their embryonic introduction of the concept planned systems of higher education.

The Educational Studies in Canada

True to its word, in 1910 the Foundation commissioned Abraham Flexner to carry out a study of medical schools in the United States and Canada (Flexner, 1910). In the preface of the report Pritchett explained that due to an absence of

unity of purpose or of standards among colleges and universities that had sought acceptance the Foundation was compelled to critically study their work and commend [to them] the adoption of such standards...

and bring about some fair conception of unity and the attainment ultimately of a system of schools intelligently related to each other.

Part of the compulsion arose from the Foundation's decision in 1909 to amend the *Rules of Admission* allow the participation of state universities in the pension fund. In the course of deciding whether or not to make such an amendment, the Foundation observed that the terms of the *Agricultural College Act* (the *Morrill Act*) in the United States were not being fulfilled because professional schools were not properly integrated into the land grant colleges and, as a result, were below standard. The Foundation pointed to medicine (including dentistry) and law as schools about which not enough was known because many of them were only loosely connected to the universities (Carnegie Foundation for the Advancement of Teaching, *Annual Report*, 1909).

The impact of the Flexner report was so powerful that, in 1913, Andrew Carnegie added to the Foundation's endowment a gift to provide for a Division of Educational Enquiry, the terms of which were:

To conduct studies and to make investigations concerning universities, colleges, professional schools and systems of education generally, to investigate problems of education affecting the improvement of educational methods, the advancement of teaching, or betterment of educational standards. (Carnegie, A. (1913, January 31). [Letter to the Trustees of the Carnegie Foundation], CUCFAT)

Between 1910 and 1932, the Foundation, through the Division, commissioned six educational studies that affected higher education in Canada, some profoundly.

It is important to understand that the Division of Educational Enquiry was not a separate or independent entity within the Foundation. It was in the first instance a fiscal necessity. As a defined benefit pension plan, the Foundation's endowment had an actuarial limit. This fact was recognized even before the Division of Educational Enquiry was formed (Cattell, 1909; Jastrow, 1910). If the educational studies and their recommendations were funded from the pension endowment that limit would either be exceeded or access to the fund cut-back, hence the need for an additional and separate endowment.

Flexner Report, *Medical Education in the United States and Canada*

The Flexner report argued that medical education and practice should be based on science. Pritchett, in the preface to the Foundation's next study (Redlich, 1914), said that the report set the standard for all the Foundation's future educational studies. The report was bluntly critical of the medical schools at Dalhousie University and Western University, as it was of several medical schools in the United States. Flexner called the Halifax Medical College "feeble" and "highly objectionable," and described the relationship between it and Dalhousie as "peculiar" (p. 321), and said that in Canada only the medical college at Western University was worse. Moreover, the report revealed to the Foundation that the Halifax Medical College was, unlike the university, tax supported. This put Dalhousie's own status within the Foundation's pension fund in an uncertain and precarious position. Dalhousie was the first Canadian university accepted into the pension fund on the basis of its charter that expressly denied tax support as well as denominational status. The university was left with no middle ground if it did not want to place its access to the pension fund in jeopardy; it could either break all ties with the medical college or take it over. In 1911, Dalhousie bought-out the college, and created a new medical school with full faculty status (Dalhousie University, Senate minutes, May 16, 1910; Board of Governors minutes, May 5, 1911, DAL). In 1920, Dalhousie received a \$500,000 grant from the Carnegie Corporation for its new medical school (Lester, 1942).

All, however, was not necessarily smooth sailing thereon for Dalhousie with the Foundation. Instead of reverting to the status quo ante, the secretary of the Foundation informed President Mackenzie that the survey that led to the university's initial acceptance into the pension plan did not have to be repeated, but that detailed information had to be provided about each Dalhousie faculty member currently covered by the plan and any new members (Furst, C. (1912, July 13). [Letter to A. Stanley Mackenzie], DAL). This may have been due to wariness on the Foundation's part about the efforts of some former Halifax Medical College lecturers, who under the constitution of the college had been appointed without any involvement on the part of Dalhousie (Halifax Medical College, Halifax Medical College Constitution, 1875, FC 02 0203 no. 06939, DAL), to secure professorial status in the new faculty (Waite, 1994), an issue that the Founda-

tion continued to pursue (Mackenzie, A. S. (1914, March 16). [Letter to Henry Pritchett], DAL; Pritchett, H. (1917, February 1). [Letter to A. Stanley Mackenzie], DAL). Here we begin to see evidence of a hand in glove relationship between financial incentives to improve quality—the pension plan—and the Foundation's reform agenda—educational studies and standards for acceptance into the pension plan.

The Flexner report was most critical of the medical school at Western, which was even more tenuously connected to the university than the Halifax Medical College was to Dalhousie. Although identified as the university's medical department, in Flexner's view it was "practically an independent school" (p. 322). It was owned and operated by a syndicate of medical professors, none of whom were appointed by or held appointments in the university. In other words, it was exactly the kind of professional school that the Foundation had warned against in 1909; it was "sheltered," at arm's length, and proprietary (Carnegie Foundation for the Advancement of Teaching, *Annual Report*, 1909). The report concluded that the school performed "no present function" (p. 323). Perhaps with that judgement in mind, Western proposed to take over the medical program, but, unlike Dalhousie, rejected an offer from the members to sell their interest in the school (Gwynne-Timothy, 1978). The university created an entirely new faculty and program that complied with Flexner's recommendations. This in turn led the provincial government to provide operating funding in 1914.

Unlike Dalhousie, where the university's disposition of its medical school had a bearing on the university's status in the Foundation's pension fund, Western was not a participant in the pension fund, nor, as an Anglican institution, had it sought to be. This can be explained by a step taken by the Anglican church in 1910 to create a pension fund expressly based on the Foundation plan (Lang, 2021; Savage, 1953).

The impact of the Flexner report on Canadian higher education, although successful in terms of the Foundation's reform agenda, revealed an outer limit to its influence. The report permanently restructured medical education. It did not, however, win over the medical profession. In Nova Scotia and Ontario, the response of the profession, including, of course, the faculty of the proprietary medical schools that were closed, all of whom were full-time physicians and part-time professors, was dismissive. Much was made of Flexner's limited background in medicine and, the critics thought, the insufficient length of his visits to the faculties. In 1923, seven years later, some members of the profession opposed the appointment of a graduate of the Halifax Medical College to a departmental headship in Dalhousie's new

faculty of medicine, partly on the grounds that he, in their minds, had disparaged the college, and aided and abetted Flexner (Waite, 1994), and partly on the grounds that his outstanding professional education did not offset his relative lack of professional experience, an argument that could not have been more contrary to Flexner's principles specifically and the Foundation's generally. As late as 1927, the Canadian Medical Association, in its report on the state of medical services in Canada, damned the report with faint praise, saying that although the take-overs "resulted beneficially in eliminating the lower grade schools...standardization has served its purpose and the sooner we abandon any idea of uniformity the better for the future progress of medical education" (Primrose, 1927, p. 1).

Learned and Sills Report, Education in the Maritime Provinces of Canada

In 1919, Dalhousie, along with other Maritime universities, were again caught up in the Foundation's reform whirlwind. Having reviewed and deferred the many applications from Maritime colleges and universities for acceptance into the pension program, with the Flexner report in hand, and with an official request from the government of Nova Scotia, the Foundation commissioned another educational study "with a view to suggesting a constructive policy particularly of the institutions that had applied for aid" (Learned & Sills, 1922, para. 3). This in principle was much like the position that Pritchett took in his letter to the governor of Ohio—create a coordinated system, in this case by chartering a new university with which existing universities would be federated. The Corporation and Foundation would provide \$3 million to meet the costs of transition. In the preface to the report, Pritchett intimated that the previous requests from Maritime colleges and universities for financial assistance from the Foundation and the Corporation had been deferred but not finally rejected, and that depending on their response to the report—which expressly referred to the inadequacy of retirement provisions for faculty—could be reconsidered, including acceptance into the pension plan. This was a powerful enticement.

Having visited and reviewed all the colleges and universities in the Maritime provinces and Newfoundland, Learned and Sills came to a conclusion that, denominational status aside, only two—Dalhousie and

Saint Francis Xavier—met the Foundation's academic standards. Of the two, only Dalhousie was a "true university" (Learned & Sills, 1922, p. 30). The rest were judged to be "something other than genuine colleges" (p. 30). These were not arbitrary judgements. They followed a rule for acceptance that the Foundation adopted in 1910 to exclude institutions that were, in practice, hybrids of college and sub-baccalaureate instruction. The status of Mount Allison and Acadia could rise, according to the report, if they were to separate themselves from the lay seminaries and preparatory departments embedded in them, which would have brought them into compliance with a rule for acceptance into the pension fund (Carnegie Foundation for the Advancement of Teaching, *Rules for the Admission of Institutions*, 1910). Evidently it did not occur to either the Foundation or Learned and Sills that, for small colleges like Mount Allison and Acadia, the rule would defeat economies of scale that were already precarious.

In Prince Edward Island and Newfoundland, they judged the colleges to be collegiate institutes, more like advanced secondary schools than universities. They expressed the same concern about the University of New Brunswick, recognizing however that its charter gave it university status, thus confirming a prediction that Pritchett had made in 1906 that ultimately New Brunswick would fail to meet the Foundation's standards (Pritchett, H. (1906, October 15). [Letter to Maurice Hutton], Falconer Papers, A1967-033, UTA).

Dalhousie's president quickly supported the report (McKenzie, A. S. (1922, June 20). [Letter to Henry Pritchett], CUCFAT). Although the report did not attach Dalhousie's name to the new university, the implication alone put Dalhousie in a difficult political position vis-à-vis the other Maritime universities. The report was blunt: absence of tax support did not mean absence of state control, which posed a complication even for Dalhousie. Learned and Sills called educational policy in every Maritime province "a political product" (Learned & Sills, 1922, p. 6). At the same time, they reaffirmed the Foundation's long-held position that absence of financial support from religious organizations did not mean absence of sectarian control.

Context is important in understanding the report—what it found and what it proposed—and its historical significance. First, by the time the report appeared, government sanctioned federation was fully in place in two provinces. A reader of the report then and now would quickly appreciate the thoroughness with which Learned and Sills had studied the Manitoba and Ontario models. So had the government of Nova Scotia when, years earlier, it had considered the possibility of federation

(Waite, 1994). Through the report and the \$3 million that both the Foundation and the Corporation committed to support its adoption, the Canadian model of federation would be taken a step beyond any of the existing provincial models. Learned and Sills took pains to explain why and how their proposal was not like either the Ontario or Manitoba model, especially with regard to participation.

Second, although the Foundation commissioned studies of other jurisdictions in both the United States and Canada, the Learned and Sills report was the only one that, before or after, was pan-jurisdictional. Its scope and its recommendations encompassed three provinces and Newfoundland. In this sense, the report was a step beyond for the Foundation. The studies of medical, dental, and law schools were not really pan-jurisdictional. The schools were outside the orbit of government regulation and, in most cases, public funding. Their parent professions were self-regulating.

It was an instance in which the Foundation sought to design what today would be called a system of higher education. The Ontario and Manitoba models, the report noted, were elective; denominational colleges and universities could choose at any time to federate or not. Election in turn meant that there was no over-arching design or concept of a higher education system. In other words, it was a *system by chance*. In this case, however, the cost of the report's recommendations would be met by the Corporation, but it would come on the Foundation's terms, in other words a *system by design*, which the report laid out in detail. This interconnection of the Foundation and the Corporation was highly unusual, not only in Canada but also in the United States.

Finally, and of fundamental significance to the role and impact of the Foundation and the Corporation on Canadian higher education, Learned and Sills were not naïve about the strength of sectarianism in shaping higher education in the Maritime provinces. Their report was the only instance in which the Foundation sought to accommodate denominational institutions. The report's explicit and implicit willingness to accommodate denominational universities was a signal that, after 15 years of contention, the Foundation was ready to give second thought to its position on sectarian higher education. Here we must recall that the undenominational rule for acceptance into the pension fund was not one of the tests for academic standing. It stood apart as an a priori pre-emptive assumption that no denominational university could meet the standards for academic standing. The only defense of the Foundation's position was Pritchett's argument in 1908 that denominational universities could not afford the cost of playing two roles, which in Canada was to paint with a very broad brush.

The report came to the conclusion that "to seek to perpetuate the present arrangements, therefore, is foregone defeat" (Learned & Sills, 1922, p. 32). To resolve the situation Learned and Sills first examined forms that the reorganization of higher education in the Maritime provinces might take: differentiation, selection, and confederation. Differentiation was the model that the Foundation several years before had commended to the state of Ohio. Learned and Sills concluded that differentiation would be unworkable due to the intensity of sectarian identities. Selection, by which Learned and Sills meant the elevation the status of a single university—Dalhousie—in which all government, Corporation, and Foundation support would be invested to serve the entire region, including Newfoundland. The weakness of selection as an organizational model in the report's realistic view was that Dalhousie was not sufficiently representative of the Maritime provinces at large and, despite its non-denominational charter, was seen by the public as Presbyterian.

That selection was discussed at all sent a significant message to the denominational colleges and the University of New Brunswick: the only path to future financial support from either the Foundation or the Corporation was through some form of inter-institutional cooperation.

Learned and Sills settled on confederation as the only workable path for reorganization, under which an entirely new pan-provincial university in Halifax could be established. Under the plan Dalhousie would delegate all its rights, assets, library, and control of its professional programs to the proposed new university, to which all other professional programs in the Maritimes provinces, present and future would be added. Dalhousie would continue to deliver liberal arts instruction as a constituent college of the new university, as would Acadia, King's, Mount Allison, New Brunswick, and Saint Francis Xavier, each of which would relocate to Halifax, with the entire \$3 million cost of transition met by the Corporation (Learned & Sills, 1922, p. 37). The cost of superannuation, which the report did not estimate, would be met by the Foundation through the pension fund (Savage, 1953). Each constituent college would offer its own first-year liberal arts curriculum. With differentiation still in mind, Learned and Sills expected that upper-year courses would be delivered jointly, with the expectation that colleges would choose to specialize and concentrate resources in certain disciplines. This arrangement, the report argued, would be "particularly effective in handling a genuine honours curriculum" that Learned and Sills saw as a "precious feature of English and Canadian universities" (1922, p. 41). Each constituent college would have an *ex officio* seat on the new university's board of governors, as would the government of each province and

Newfoundland. Although the term “merger” was used in the formal plans for confederation, today this arrangement is better described as a consortium.

Some critics of the Foundation, however, might point to this as an example of the application of an industrial model of efficiency to higher education (Barrow, 1991; Harvey et al., 2012; Hohner, 1987; Karl & Katz, 1981, 1987). We know that Carnegie was an adherent to the Gospel of Efficiency movement, which was popular in the Progressive Era in the United States (Hays, 1959; Lagemann, 1987). In 1910, the Foundation commissioned and published a report called *Academic and Industrial Efficiency* (Cooke, 1910). In the United States, this raised a legitimate fear that, through its educational enquiries, the Foundation would force business principles on scholarship and university management. A close reading of the Cooke report confirms that, if endorsed, the report would have indeed been an intrusion on academic and institutional autonomy. It would have been an application of Taylorism, which was a popular industrial concept at the beginning of the 20th century. What is more important, however, within the context of this study, is Pritchett’s circumspect response in his preface to the report, which he concluded by saying:

The college is partly a business, and partly something very different from a business. Mr. Cooke is concerned with only the former aspect. It will be interesting for those to whom the latter viewpoint is more natural to consider how far his observations have suggestive significance.

In other words, the Foundation had no intention of endorsing the report, nor did it wish to impose the industrial model on universities. Universities could take or leave the report at their discretion. Pritchett, thus, publicly disowned the report, a matter of fact that Barrow (1990), Noble (1979), and Karl and Katz (1987) overlook.

Perhaps most significant to this study, Learned and Sills did not promote the industrial concept or mention the Cooke report. They did not speak about efficiency. They did, however, propose reorganization of the undergraduate liberal arts curriculum, assigning lower years to the central university and upper years to the constituent colleges, which they could specialize. The report assigned all professional programs to the central university. They did not, however, propose any academic changes in the content of the curriculum, either in liberal arts or professional programs. Their idea was to reorganize its delivery within a comprehensive system. This may or may not have been done in the name of

efficiency. Learned and Sills went into detail about what their proposal would cost modelled on the structure of federation at the University of Toronto. However, they did not forecast any savings, which would have been the litmus test of efficiency. There was one exception: libraries. Although the consolidation of libraries was not described as an efficiency, that as a matter of obvious fact was what it was. Not long after, in 1933, a Foundation advisory committee on Canadian university libraries confirmed Learned and Sills’s judgement by advocating consolidation of university libraries in all provinces (Ridington et al., 1933).

With the report in hand, and at the behest of the Foundation, the universities and colleges and their respective governments met in conference three times in 1922 to devise and come to agreement on a specific plan for carrying out Learned and Sills’s proposal for confederation. They were able to devise a plan, but not reach an agreement to participate in it.

The plan—*Conference of Representatives of the Universities and Governments of the Maritime Provinces and Newfoundland* (December 12, 1922, DAL, UA-3-173-7-05)—was evidence that the Learned and Sills report was taken seriously. Learned and Sills attended all the meetings of the conference. One month later, with the plan in hand, the Corporation formally agreed to provide the funding for which the Foundation’s report called (Henry Pritchett to A. Stanley McKenzie, January 17, 1923, UA-3-173-0; Henry Pritchett to W.E. Thompson, March 5, 1923, DAL, UA-3-7-710). The plan was more detailed than the report. When the several universities debated whether or not to join the confederation, their point of reference was the conference plan, not the Foundation report. The plan was, as the Foundation hoped, a blueprint for a complete system of higher education that crossed jurisdictional boundaries. The plan was evidence also that its framers understood that decisions to participate or not would be final; a university or province was either in or out of the system design. The conference plan named only Acadia, King’s, and Mount Allison, to which were added “a Presbyterian college, a Roman Catholic college, [and] a non-denominational college” (Conference of Representatives of the Universities and Governments of the Maritime Provinces and Newfoundland [December 12, 1922, DAL, UA-3-173-7-05]). Dalhousie could be the non-denominational constituent college on its own, within the new “University of the Maritime Provinces” as proposed by Learned and Sills (1922, p. 37). All liberal arts and pure science students would be registered in the new university—and pay fees to their respective constituent colleges, but the new university would set and conduct examinations for all stu-

dents in all programs, except for Theology. Dalhousie's McKenzie (in a public letter published in Nova Scotia's most influential newspaper) promptly endorsed the plan and, perhaps more important to the debates that would follow, made it clear that Dalhousie would place no claim on Dalhousie also being the name of the new university, which he called simply the "Central University" (*The Morning Chronicle*, January 2, 1922).

Other than ensuring that revenue from tuition fees from arts and science programs would go to the constituent colleges, the conference plan was silent about costs, assuming strategically that the Foundation would meet the fiscal requirements outlined by Learned and Sills.

The universities and provinces stewed and argued over the plan for the next five years without reaching a consensus that could satisfy the Foundation. The inter-provincial political intrigue and sectarian schemes that led to that outcome are described well by Reid (1984), Waite (1994), and Brison (2005), and do not need to be re-examined here. However, unlike the Flexner report that affected Canadian universities and was accepted and acted on quickly, there were early signs that the odds of an agreement on confederation being reached were impossibly long.

As early as 1923, Acadia took a position that revealed a dimension of the sectarian debate that Learned and Sills had not taken into account, and to which Pritchett had also not attended in his 1908 address to denominational colleges. Baptist colleges and universities in Canada and the United States had long drawn a distinction between what the Foundation called *tax support*—a financial matter—and *state control*—a jurisdictional matter (Johnston, 1976; Longley, 1939; Potts, 1971). Acadia took this distinction further by expanding state control to include *public control*, with or without legislative authority. Acadia did not want to alienate its Baptist constituency by ceding control or being in any way beholden to a new university as proposed by Learned and Sills and defined by the conference plan that, while not under the control of any provincial legislature, would be (in the Foundation's terms) a state university. Sharing these views, John D. Rockefeller, a devout Baptist, pledged \$250,000 to the university, to which he later added \$375,000 as a matching fund (Longley, 1939). The distinction drawn by Acadia was not lost on Learned, who acknowledged that he did not think Acadia would ever submit to such control and would back out of the proposed federation, which it did under the instructions of the Baptist Convention (Learned, W. S. (1923, March 5). [Letter to G. F. Pearson, March 5, 1923], DAL, UA-3-1713-10; Learned, W. S. (1923, March 21). [Letter to A. Stanley McKenzie], DAL, UA-3-173-10).

The disposition of Saint Francis Xavier's University participation revealed another dimension of the sectarian debate that Learned and Sills did not foresee: that there may be divisions of opinions within denominations. Saint Francis Xavier was pulled in four directions within the Roman Catholic community, exemplifying in the extreme the dilemmas faced by all the Maritime denominational universities. Late in 1920, the university's board passed a resolution instructing the president to invite the Foundation to include the university in what would become the Learned and Sills study (Saint Francis Xavier University Board of Governors, Minutes, December 17, 1920, StFXUA, Box 70; Henry Pritchett to H. P. MacPherson, January 4, 1921, CUCFAT). The Foundation quickly accepted, even before the terms of reference of the study had been set (Pritchett, H. (1921, January 4). [Letter to H. P. MacPherson], StFXUA). When the report appeared, the parishes and dioceses in Nova Scotia and Newfoundland supported confederation, perhaps because of the attention that Learned and Sills paid to improving the quality of teaching in schools, a problem that the university's board acknowledged in another resolution passed on December 17, 1920. The incentive of access to the pension fund had been attractive enough for the university in 1921 to amend the composition of its board by increasing the number of lay members and decreasing the number of priests (all this before the report was written). In 1922, only days after the report's publication, the university's faculty, with the prospect of pension eligibility principally in mind, informed the Corporation that they unanimously supported the report (Pritchett, H. (1922, February 3). [Letter to A. Stanley McKenzie], CUCFAT). The university's board, still interested, sought exemption from relocation to Halifax (Reid, 1984). Despite support from local parishes and the expressed desire of the faculty, the diocesan bishop that the Hierarchy of Nova Scotia and Newfoundland commissioned a report that put forward several arguments against Saint Francis Xavier entering the proposed confederation. One argument was a warning from the rector of St. Michael's College that, based on the Catholic experience of federation at the University of Toronto, confederation would lead to conflicts with Catholic views. The report, however, acknowledged the division within the faculty on confederation, about whom the report said "had no reason for complaining" (Morrison, J., (1922, February 4). [Report to Governors of Saint Francis Xavier College], CUCFAT, Box 70). After nine months of fence-sitting, the board decided against confederation (Saint Francis Xavier University Board of Governors Minutes, October 20, 1922, StFXUA). Whether by serendipity or remarkable foresight, the strategy worked. Being included in the study led to recognition

of Saint Francis Xavier's extension program, for which the Corporation soon went on to award a \$70,000 grant.

The report also did not fully foresee the implication of relocation to denominational institutions. In Pritchett's 1908 address to the Methodist conference in which he warned against a tragedy of the commons, he portrayed denominational universities as having to choose between two roles: promoting a religion, mainly by preparing clergy, and promoting genuine higher education. The reluctance of denominational Maritime universities was based more on a third role, which can best be described in ecclesiastical terms as pastoral or diocesan. This bumped into the Foundation's rule, which Learned and Sills invoked, about separating seminaries and preparatory departments from the post-secondary components of the universities. At the same time, however, the report acknowledged that the reputation and public support for the denominational universities depended as much or more on their lay seminaries as on their university programs. This contradiction was especially a problem for Mount Allison, the last university to withdraw from the plan for confederation. From its inception and formally in its charter, Mount Allison was a hybrid combination of sub-baccalaureate and collegiate preparation, both closely tied to its locality (Reid, 1980). Within weeks of the release of the Learned and Sills report, the president of Mount Allison twice warned Learned that there would be local opposition to relocation of the university (Borden, B. C. (1922, May 27). [Letter to W. S. Learned]; Borden, B. C. (1922, December 14). [Letter to W. S. Learned], CUCFAT).

There was an important exception to the denominational opposition to the plan for confederation as it might impinge on institutional autonomy. The Learned and Sills report called for all existing professional programs to be taken fully into the new Central University. The conference plan devised by the universities, acting on their own, expanded this to include new professional schools. Even with allowance for upper-year course specialization, where the universities dug in their sectarian heels was their autonomy over undergraduate liberal arts programs.

Shortly before the report appeared, Dalhousie had firmly discouraged an overture from King's College, the campus of which had been destroyed by fire, to form a federation with temporary support from the Corporation (McKenzie, A. S. (1920, February 20). [Letter to W. S. Learned], DAL (3-173-7-09); McKenzie, A. S. (1922, March 8). [Letter to W. S. Learned], CUCFAT). With the encouragement of Sills (Sills, K. (1922, February 2). [Letter to A. Stanley McKenzie], DAL (UA-3-173-10)) and plans for confederation underway, a discussion was re-

opened (with the full support of the college's faculty) with the Foundation about a fully developed plan under which Dalhousie and King's would form their own federation that would be supported financially under the aegis of the Learned and Sills report, whether or not other universities could be brought on board (Learned, W. S. (1923, April 14). [Letter to Fred Pearson], DAL (UA-3-173-7-06)). A few days later the Foundation advised Dalhousie that the proposal was a "wise move regardless of the ultimate decision of other institutions" (Learned, W. S. (1923, April 26). [Letter to G. F. Pearson], DAL (UA-3-173-7-06)). In this letter Learned also told Pearson, who was vice-chair of Dalhousie's board, that the proposal could be made public as a "striking object lesson of how federation was going to work," and that the Foundation would make a decision on the proposal within one month, which it did by approving the proposal and awarding a \$600,000 one-time grant and a \$30,000 (totalling \$150,000 by 1928–1929) continuing grant under a provision in the conference plan that allowed for mergers. This was exactly what King's and Dalhousie asked for in the proposal. To this a general purpose grant of \$198,000 was later added (Lester, 1942).

This may explain why, despite the early signals that success for the plan for confederation was out of reach, the deliberations dragged on. The care and thoroughness with which Learned and Sills estimated the costs of the institutional shortcomings that confederation would address became as much an impediment as a boon. On the basis of the report's estimates, several universities played a waiting game in the hopeful view that, even if the conference plan did not go ahead, the Corporation on the instruction of the Foundation would provide what they calculated to be their share of the \$3 million commitment. They had reason to believe this. The Foundation may have overplayed its hand by acting quickly on the Dalhousie–King's proposal and making it public as an object lesson of the benefits of federation, by awarding the grant to Saint Francis Xavier for its extension program, and a \$260,000 start-up grant to Memorial. The unintended lesson was that benefits could be had without federation.

Mount Allison believed further, not only that the Foundation would pay out the \$3 million, but that it could be persuaded to authorize funding in addition to the \$3 million (*Mount Allison and the Carnegie Plan for University Federation, Appendix 1, April, 1928, MAUA*).

In addition to estimating the transitional costs of confederation their report also estimated the cost of sustaining the confederation, for which a \$4.5 million endowment would be required. The confederation plan made no provision for sustained funding, other than ensuring

that the constituent colleges would retain fee revenue. Learned and Sills thought the endowment could come from government and transfers from constituent college endowments but did not specify in what amounts. This became a sticking point in the negotiations from start to finish, even after New Brunswick and Acadia, the college with the largest endowment, dropped out.

Another sticking point was relocation. New Brunswick from the start refused to consider relocation. Two other universities—Mount Allison and Saint Francis Xavier—indicated a willingness to participate in confederation if they did not have to move to Halifax. Mount Allison went so far as to propose that the university join the Dalhousie–King’s federation (*Mount Allison and the Carnegie Plan for University Federation, Appendix 1, April, 1928, MAUA*). In the end, Mount Allison’s president concluded that having to study outside the province would be too great an economic burden on students (Reid, 1989). The university’s faculty of theology did, however, move to Halifax. Support for the confederation-without-relocation argument came coincidentally from an educational study of Vermont that the Foundation had commissioned several years earlier. In that report (Carnegie Foundation for the Advancement of Teaching, *Education in Vermont, 1914*) the commission recommended against relocation of Middlebury College to Burlington, where the state university was located. W. S. Learned was a member of the commission, a fact of which Mount Allison was aware (*Mount Allison and the Carnegie Plan for University Federation, Appendix 1, April, 1928, MAUA*).

Dragging the negotiations out over five years blunted the significance of access to the Foundation’s pension plan. Dalhousie was already in the pension plan, as was New Brunswick, although absent confederation it would not continue to be. Access to the plan was, however, as Learned and Sills’s report confirmed, important for the others. However, by 1922 the Foundation was openly reporting that the pension fund was approaching its actuarial limits, which would have reduced the incentive to only a few years for new members, no matter the merit of their cause. Dalhousie and New Brunswick would have known this as recipients of the Foundation’s bulletins. On April 24, 1928, after a meeting with representatives of all the Maritime universities, the Foundation and Corporation withdrew their offer.

The Learned and Sills report, nevertheless, confirmed a principle that Andrew Carnegie and Henry Pritchett set in motion at the start and with which the Foundation kept faith: whether or not a university met the standards for acceptance into the pension fund or followed the recommendations of educational studies, the standards would have been set and institutions

would aspire to meet them, either directly or indirectly. This is the prism through which to judge the overall effect of the Foundation’s pension plan mandate and its educational influence reform mandate on Canadian higher education. The influence was often felt without financial support from the pension plan. The presence of the plan itself was an incentive, as Carnegie and Pritchett predicted it would be.

Canadian universities with medical schools quickly accepted and acted on the recommendations of the Flexner report, even when they were criticized by the medical profession, and in the case of Dalhousie when they complicated the university’s status within the pension fund.

The Learned and Sills report failed to convince Maritime universities to join in confederation. A variety of reasons explain the failure. The report’s judgements about the poor quality of higher education in the Maritime provinces and Newfoundland, however, was not among them, and were not lost on government and the universities’ religious sponsors, several of whom—especially at Acadia and Mount Allison—increased their financial support by more than the universities would have received under the plan for confederation plan. Sills may have written the report’s epitaph right at the start when told the president of Dalhousie that if the report did nothing else it was of some use “stirring up interest in higher education in the provinces (Sills, K. (1923, March 16). [Letter to A. Stanley McKenzie], CUCFAT). It indeed did that.

After the collapse of the plan for confederation, the United Church raised \$2 million to correct capital shortfalls that Learned and Sills had identified (*Mount Allison and the Carnegie Plan for University Federation, Appendix 1, April, 1928, MAUA*). During the course of the negotiations Acadia, in addition to the Rockefeller gift, raised \$750,000, \$150,000 of which came from the local citizenry (Longley, 1939). From this it can be said that, in terms of raising the quality of higher education in the Maritime provinces, some of the report’s objectives were realized without any cost to the Foundation, a possibility that Carnegie and Pritchett foresaw in 1905.

Taken together, between the announcement of the report in 1922 and its formal rejection in 1928, Corporation and Foundation grants to Maritime universities (Harris, 1976; Lester, 1942), together with the private donations that the Learned and Sills report leveraged, a total of \$5 million was invested in higher education, which was more than the estimated cost of confederation. The amount did not include the \$200,000 cost of pensions for Dalhousie and New Brunswick faculty during that period (Carnegie Foundation List of Pensionables, January 4, 1929, Box 86, CUCFAT).

Geis Report, *Dental Education in the United States and Canada*

In 1920 the Foundation commissioned William Geis to conduct a study of dental education. Geis's mandate was "to do for dental education...the same service that the Foundation undertook for medical education" (Geis, 1922 preface). At the time there were four dental schools in Canada—Dalhousie, Laval, McGill, and Toronto—and one about to open at Alberta.

Unlike Flexner, the Geis report found little to criticize about dental education in Canada. Flexner had expressed concern about an over-emphasis on applied professional practice, and too little emphasis on basic science and research. Repeating the importance of science taught at university standards, Geis placed the Canadian schools ahead of many American schools. His report, on the other hand, said that all the Canadian schools, compared to their American counterparts were inadequately funded, which had a particularly deleterious effect on research. In the years between 1921 and 1925, every Canadian dental school operated at a deficit.

The performance of the Canadian dental schools was attributed by Geis to Flexner and the standards that his report advanced. The study highlighted the strength of the dental program at Dalhousie as stemming from its "intimate association" (Geis, 1926, p. 219) with the medical school. In the same vein, the report credited the strength of McGill's dental school to its close integration with the medical school, and, in the case of Alberta, noted that the new dental school was actually within the faculty of medicine.

Given Pritchett's flat-out declaration that Geis had the same mandate that Flexner had, and the chronology of dental education in Canada as soon as the Foundation announced the Geis commission, one cannot overlook the possibility that the message of the Flexner report was not lost on Canadian dental schools and professional associations. As a result of the Flexner report, by 1920 not only were the medical schools at Dalhousie and Western fully integrated into their respective universities, so too were the dental schools. That was not the case for dental schools elsewhere. In 1921, Alberta added three years to its dental curriculum to gain American, as well as Canadian, recognition; otherwise it would not have met Geis's standards. Also, in 1921, the dental program at Laval, which the university had taken over from the province's professional Dental Association, was relocated to Montreal as a full faculty within the university. In Ontario the province's dental school was under the ownership and control of the professional Royal College

until 1925 when, as in the case of the medical schools at Dalhousie and Western, the University of Toronto bought out the college and founded its own faculty of dentistry fully within the university. It is reasonable to suspect that, had these steps not been taken in anticipation of the Geis report, it would have looked like the Flexner report insofar as its effect on Canadian higher education was concerned.

Redlich Report, *The Common Law and The Case Method in American University Law Schools*, and Reed Report, *Training for the Public Profession of The Law*

In 1913 the Foundation commissioned two studies of legal education. The first, which was completed rapidly and appeared in 1914, investigated the pros and cons of the case method as the basis for legal instruction in university law schools and bar association law schools. The purpose was to improve legal scholarship and promote research (Redlich, 1914). The report did not examine Canadian law schools, except to say that they followed the English model. The passing reference, however, was an important factor in the second study, which took eight years to complete, and critiqued the English model in the course of examining Canadian law schools (Reed, 1921). The report made no recommendations with regard to Canada.

Repeating Redlich, Reed described Canadian law schools as "mere simplifications of the existing English system" but "strong on the side of practical training and professional spirit" (1922, p. 26). The weakness, according to Reed, was "the obstacles it places in the path of legal scholarship" (p. 28). The appraisal of strengths and weaknesses was very similar to Flexner's critique of Canadian medical schools. Also like the Flexner report, the Reed report examined university law schools and law schools that operated under the aegis of law societies. The report concluded that the university law schools in Canada struck a better balance between legal scholarship and practical training, which in Nova Scotia and New Brunswick was recognized by *diploma privilege*, the exemption of their graduates from bar examinations. However, despite their greater emphasis on legal scholarship, the report's overall assessment was that it was not sufficient to offset the university law schools "general subordination to the practitioners" (p. 28). The re-

port said the same about most American university law schools.

Like the Redlich report, the Reed report did not make any specific recommendations, although in this case for a different reason: unlike other Foundation educational studies, the Reed study was commissioned at the request by the American Bar Association. It also may have been because Pritchett disagreed with some of Reed's conclusions (Reed, A. (1921, June 27). [Letter to Henry Pritchett], CUCFAT). The report did come to conclusions that, given its remit from the Bar Association, was more an agenda for the future action for the bar—not the Foundation—to take. The overarching conclusion was that “unitary” (p. 417) one-size-fits-all legal education was no longer tenable in the United States. There instead should be different types of law schools, with different purposes. *Short course* law schools with three-year or shorter courses of instruction were “destined to disappear” (p. 417) and no effort should be made prevent that outcome. These were the type of schools that Flexner said should either be abandoned or taken over and reformed by universities. Schools that were faculties within universities should continue to rely on the case book method, maintain high matriculation standards, focus on “national law,” and conduct research for textbooks (p. 420). Law schools under the aegis of law societies should continue more or less as they were in terms of length of program and matriculation requirements—full-time or part-time—but curricular should shift focus to “local law” (p. 420). Critics of the Foundation's educational studies argue that the classification of law schools was motivated in the name of efficiency. Reed, however, was careful to cast the classification as ways and means of responding to probable demand, and to explicitly exclude Canada.

Did any of these observations and conclusions make a difference in Canada? Some could have applied by inference to Canada. The report explicitly said that, given the state of Canada's political and economic evolution, the unitary model should continue to apply. Although no reference was made to the Reed study, in 1915 the Second Conference on Canadian Universities struck a committee to review legal education. This was while the Foundation study was well underway, and Reed was visiting law schools in Canada as well as the United States. Whether by coincidence or not, the committee, in 1917, recommended changes in curriculum and matriculation standards that would “have the advantage of bringing the Canadian schools up to the standards required by the Association of American Law Schools...and further the development of law as an academic subject” (Second National Conference of Canadian Universities, *Pro-*

ceedings, 1917, p. 16, UTA). No action was taken on the recommendations, mainly because provincial law societies were not members of the committee (Harris, 1976). The Canadian Bar Association took the issue up again in 1919, endorsed the proposals, and in 1923 reported an improvement in matriculation standards and an increased use of the case method (Canadian Bar Association, 1923).

The Reed report made a further observation specific to Canadian law schools that foreshadowed modern concerns about socio-economic access. University law schools, like all university programs, absent government subsidies of any significance, charged high tuition fees. The law society clerkship model, although minimally costly, took longer to complete, thus deferring financial returns. The result, the report concluded, was a Canadian bar that was “as a whole more exclusive than” the American bar (Reed, 1921, p. 26). No notice of this was taken at the time, but the Canadian Bar Association, perhaps inadvertently, confirmed that the comparative arithmetic of Reed's claim was correct (Denison, 1924).

Taken a step beyond legal education, the Reed report addresses the concern of some modern historians that the Foundation was colonial and continental. For example, Reed's unitary prism was indeed continental, but the result was neither continental nor colonial: unitary made sense for Canada but not for the United States. Reed and Redlich both observed that Canadian law schools were following the English model, of which Reed was critical. But Reed went on to say that the Canadian schools did better than the English in striking the balance between legal scholarship and practical training. Was that colonial? Assuming that by “colonial” the Foundation's critics mean that Canada was treated as a colony of the United States, the answer is no. It may have been a discreet message that from one former British colony to another that, despite their mutual foundation in English common law, it could move further away from the English model of legal education.

Learned and Wallace Report, *Local Provision for Higher Education in Saskatchewan*

Although the grand plan for a pan-provincial university system in the Maritimes collapsed and the pension plan was wound-up in 1929, the Foundation's Division of Educational Enquiry produced one more Canadian educational study to resolve a jurisdictional dispute between the University of Saskatchewan and Regina College, an

affiliated two-year junior college that sought funding and authority to expand to four-year baccalaureate status (Learned & Wallace, 1932). W. S. Learned was, again, one of the commissioners, this time joined by E.W. Wallace of Victoria University. The university argued that, as the provincial university, the college could only do that as a constituent college of the university, and that it was up to the board of the university to determine when and if the college met the requisite standards.

The study, in supporting the university's position, reaffirmed the Foundation's principles, most already put forward in the Learned and Sills report, perhaps not surprising given that Learned was one of the commissioners. The report repeated a principle that Andrew Carnegie and Henry Pritchett set in motion at the start and with which the Foundation kept faith: whether or not a university met the standards for acceptance into the pension fund or followed the recommendations from educational studies, the standards would have been set and institutions would aspire to meet them, either directly or indirectly, which is what the report said the college should do.

Furthermore, the report reaffirmed the Foundation's long-held confidence in planned systems of public higher education. Local details of the dispute between Regina College and the University of Saskatchewan aside, elementally the Learned and Wallace report conveyed the same message that Pritchett sent to the governor of Ohio in 1909, which he called the "guiding principle of concentration." Learned and Wallace called the Saskatchewan model of public higher education a defining Canadian characteristic that recognized "the financial obligation of the state for education in all its phases" and "the determination of these western provinces to educate their people, to support and supervise the process" all without "social control" (1932, p. 15) which was a polite allusion to sectarian higher education. Their report was less circumspect about political control. The Learned and Sills report had bluntly labelled educational policy in every Maritime province "a political product" (1922, p. 6). Learned and Wallace were even more blunt. Speaking about political influence that governors of Regis College had brought to bear on the provincial government and on the Foundation's commission, the report said:

The moment this happens and the institution finds itself in the hands of the Provincial Treasury, any student of education understands that the way is wide open for all sinister "log-rolling" that has characterized this phase of state education both in Canada and the United States for a century back. (p. 18)

Summing Up

The Foundation's Division of Educational Enquiry is one prism through which to assess the overall effect of the Foundation on Canadian higher education. Carnegie and Pritchett from the start charged the Foundation to be an educational influence. The influence was often felt without the financial incentive of the pension plan, although in the case of the Maritime provinces the plan itself was the principal incentive. Access to the pension plan was also a significant factor in Dalhousie's decision to take over instead of cutting loose the Halifax Medical College, and in the changes that Mount Allison and Saint Francis Xavier made in their charters and by-laws. The Learned and Sills and Learned and Wallace reports embedded the concept of planned systems of public higher education.

A final word about modern histories that cast the early philanthropic trusts, including the Carnegie Foundation for the Advancement of Teaching, as proxies for corporate capitalists aiming to impose industrial models on social policy, including higher education (Barrow, 1991; Harvey et al., 2012; Graebner, 1979; Karl & Katz, 1981, 1987; Noble, 1979). These histories bear serious consideration in assessing the impact of early corporate philanthropy on colleges and universities. This study, however, is about the Carnegie Foundation's educational studies only. It can neither confirm nor refute views about other philanthropic foundations contemporary with it and only coincidentally about the Foundation's pension plan when the studies intersected with it. We do, however, know that all of Carnegie's major biographers report that he was a meddler (Krass, 2011; Lagemann, 1999; Wall, 1970). This might have affected the conduct of the pension plan, but only one of the studies that made specific reference to Canada—the Flexner report—was completed in Carnegie's lifetime.

Did the Foundation, through its educational studies, impose business principles on universities in the name of efficiency? This is a question on which the Canadian experience must be viewed separately from the American experience, as must the Canadian experience with regard to the six studies that affected Canadian higher education. Two studies, if they were about efficiency, addressed the organization of provincial systems and did not attempt to force changes in academic practice. If there was an imposition, it was on government policy. The remaining four studies were aimed to reform academic practice only in professional schools that were loosely associated with universities but not part of them. In all cases the end result was raising professional prac-

tice up to existing university standards. In none of the four studies of professional education was efficiency a driving force or even mentioned.

Setting efficiency aside, a further question remains: were there other effects of the Foundation's educational studies that intruded on institutional autonomy and professional practice? In the case of Learned and Sills report on Maritime universities, wedges were certainly and knowingly driven between denominational universities and their churches. The Foundation did this in the name of raising the standard of quality, an argument that no denominational Maritime university rejected. Some not only did not reject the argument; Acadia and Mount Allison used it to lever financial support from their respective churches. Accepting the Foundation's academic standards and, in turn, seeking access to Foundation funding, however, did not mean that any of the denominational universities—Acadia, Mount Allison, Saint Francis Xavier, King's—willingly sought independence from their respective churches. They sought work-around compromises under which they would cede some, but not all, autonomy in return for funding or acceptance into the pension plan. In the case of the Learned and Sills report, the Maritime provinces in a practical sense cherry-picked the Foundation's plan. From this follows a reasonable conclusion that the outcome of the Foundation's efforts, intrusions or not, was tempered by the resilience, and sometimes push-back, from the universities and their denominational sponsors, and possibly the continual presence of Canadian university presidents on the Foundation's board.

The Flexner report drove wedges between universities and the medical schools associated with them, and the medical profession. After more than 20 years, the medical profession could not forgive Flexner. Absent the Flexner report, and the successful integration of medical education into universities, the Geis commission might also have driven wedges and the dental profession may have been less willing to accept the shift of control from professional association to university.

Absent the Reed report, for the same reasons, Canadian law schools and bar associations might have resisted upgrading curriculum and matriculation standards and expanding use of the case method. Although Canadian law schools and bar associations were slower to accept the Reed report than their dental counterparts were of the Geis report, in the end law school curricula and admission standards were upgraded and instructional use of the case method expanded.

While these events may be seen as evidence of intrusion on autonomy, we also see in the case of Maritime universities and Saskatchewan the Foundation arguing

forcefully for the protection of institutional autonomy from political interference. We also see in the case of the Learned and Sills report a willingness on the part of Foundation, recognizing the dilemma in which the denominational universities found themselves, to accept compromise; for example, by pre-emptively supporting the King's–Dalhousie federation while the conference plan was under active discussion. Finally, had the conference plan for a central Maritime university been accepted, provincial membership would have been in the minority and no provincial members could have been government officers.

There is another way of thinking about the question of intrusion. Graebner (1979) speaks about “threats to the integrity of teachers and educational institutions” (p. 103). This distinction between faculty and the institutions that employed them, on the basis of this study, has a Canadian dimension. The Canadian experience in response to the educational studies adds definition to the question. In the case of the report on the Maritime provinces we see the senates of two universities acting apart from their universities' boards to support the Foundation's plan. Mount Allison felt that it had to offer an explanation of why it did not support the plan and how hard it had fought to secure eligibility for its faculty in the pension plan. Although not directly connected to an educational study, the faculties at Queen's, McGill, and Toronto, where a pension plan operated by faculty apart from the university had collapsed, faculty were keen to support the pension fund (Lang, 2021). There is no evidence that Canadian university faculty feared that their academic integrity was threatened. What there is evidence of is faculty in sheltered Canadian professional schools not only fearing but opposing what they saw as threats to their academic integrity. Thus, in Canada, the answer to the question of intrusion on the integrity of teachers is different depending on the type of institution by which they were employed.

In the case of intrusions on the integrity of institutions, we also see different answers. On either side of the border, no one, critics or proponents, disagrees about the intrusion on the autonomy of denominational universities. The Canadian experience, however, adds significant nuance. In the cases of Acadia, Mount Allison, and Saint Francis Xavier, the intrusion was felt more by the religious organizations that financially sponsored, spoke for, and, in some cases, owned the universities than by the universities themselves. In the case of the University of New Brunswick, it was the government of New Brunswick that pre-emptively withdrew from discussions of the plan for confederation.

A further nuance can be found in the effect of the

Flexner, Geis, Redlich, and Reed reports on the scholastic integrity of institutions. As noted, the faculties of sheltered professional schools felt intrusions on their competence as teachers. However, the universities with which they were associated did not feel that Flexner had stepped on their academic toes. In practical effect, the Flexner report, as adopted in Canada, granted a monopoly to university medical schools. The medical and legal professions, however, believed Flexner and Reed had interfered with their professional self-regulatory autonomy. Although Canadian law schools moved slowly but certainly to make changes in accordance with Reed's conclusions, the Canadian Bar Association was not disposed to raise its standards for admission to the bar accordingly until the American Bar Association did, nor did it support the diploma privilege that the Nova Scotia and New Brunswick bars had already introduced.

Was the Foundation, through the Division of Educational Enquiry, continentalist and colonial? To begin considering this possibility we should note that between 1905 and 1932 there was always a Canadian university president on the Foundation's board of trustees, sometimes leading the development of centrally important policies, the rules for admission to the pension fund, and standards for matriculation for American universities as well as Canadian. In that sense, the Foundation's conduct was continental but not colonial. The Reed report was continental in scope, but not in its conclusions. It was in no respect colonial, except in observing that Canadian legal education should distance itself more from British colonialism. Flexner tarred Canadian and American medical schools with the same brush, and recommended the same remedies, which Canadian universities did not contest.

The reports on the Maritime provinces and Saskatchewan present a different prism through which to address the question about colonialism and continentalism. Both reports stood firm on protecting university autonomy from political interference. Both planted and promoted the embryo of planned systems of public education, which could be seen as limiting the autonomy of universities to set their own mandates and governments to set their own policies, and so it was seen by some universities in the Maritime provinces, the government of New Brunswick, and one college in Saskatchewan.

Were these intrusions coincidental by-products or deliberate? Graebner (1979) concluded that they were deliberate. Savage (1953) reported that Andrew Carnegie took the objections of denominational universities as evidence that the standards set for the pension fund and applied in the educational studies were working as he expected them to. In its first annual report (1906) the

Foundation declared its commitment to forging "reasonable unity in our arrangement of educational institutions" (p. 12). The reports on the Maritimes and Saskatchewan advanced that commitment unequivocally.

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- McGill University Archives (MUA)
- Mount Allison University Archives (MAUA)
- Falconer Papers, University of Toronto Archives (FPUTA)
- Queen’s University Archives (QUA)
- Saint Francis Xavier University Archives (StFXUA)
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