

JOEL DEAN PAPERS

Acc. # 1035

Inventory (Preliminary) OPA - 1941-1942

BOX 1 PERSONAL - Folders 1 through 16

1. Book file (progress reports. Summaries of staff meetings, memoranda, speeches, etc.)
2. Committee on Price Determination (correspondence, budget)
3. Articles (by J.D.)
4. American Economic Association
5. Conference on Price Research (5/8-9/1942)
6. Copper (price schedule, policy discussions)
7. Cost Studies (correspondence, memos, etc.)

(Note: 3-42 J. D. Moved from machinery section to head up gas rationing program for OPA)

8. Courtesy letters - J.D.
9. Daily Reports
10. Department Store Cost Functions (mostly regrets pamphlet out of print)
11. Harvard Business Review
12. Expense Statements - 1941
13. Expense Statements - 1942 (empty)
14. Financial
15. Hosiery Mill Monograph (J.D.)
16. Hosiery Monograph (J.D. "Statistical Cost Functions of a Hosiery Mill")

BOX 2 PERSONAL - Folders 17 through 23

17. Leather Belt Study (J.D.) (OPA Technical Paper #2)
18. Leather Belt Study - M.S.
19. Price Policy Questionnaire
20. Price Determination (various tables, survey results)
21. Shoe Stores, the long run behavior of costs in a chain
 (J.D. Correspondence Monograph)
22. Machinery Prices - Direct Control (booklet, correspondence -J.D.)
23. Mercury Costs (statistics)

BOX 3 Folders 24 through 29

24. Military Statistics Course
25. Miscellaneous (personal correspondence, memos, acknowledgements, etc.)
26. National Bureau - University Committee Conference
27. University of Chicago (various correspondence)
28. Reprints (includes study on industrial furnaces)
29. Speeches - J.D.

BOX 4 Folders 30 through 41

30. Retail Price Lag (monograph. Also includes OPA management price control report on metals)
31. Anecdote file - machinery (weed burner)
32. Business Specialists - Machinery (recruitment)
33. Coal Mining Equipment - descriptions
34. Forging Meetings - Machinery
35. Machine Tool Meetings - Machinery
36. Meetings of Unit Chiefs - Machinery (includes 1941 survey of West Coast machinery manufacturing)

BOX - Folders 30 through 41 (Continued)

- 37. Operational Memoranda - Machinery (J.D.)
- 38. Survey Questionnaire - Machinery mfgs.
- 39. Miscellaneous: ("Take to Washington") (Includes class lists for business school courses at University of Chicago, including T.O. Yntema class list); also, student paper on pricing in air heating industry and packet of miscellaneous materials on National Defense Contract Exhibit - 1941)
- 40. List of heat exchange mfgs. (includes wholesale price index graph, 4-42)
- 41. Material for Articles (various monographs, etc.)

BOX 5 MISCELLANEOUS OPA MONOGRAPHS, REPORTS, LETTERS, ETC. - Folders 42 and 43

- 42. Prices - Memoranda, reports, etc.
- 43. Machinery - Miscellaneous Reports and Monographs

BOX 6 Folders 44 and 45

- 44. Miscellaneous Dean Papers - reports, correspondence, WPB directives
- 45. Miscellaneous Reports, Directives, etc. - Coal, Fuel, Stoves

BOX 7 Folder 46

- 46. Miscellaneous Documents: field rationing instructions, rationing guides, filled requests, solid fuels rationing report, OEM report - corporate profits, OEM Handbook, O'Mahoney Report re post-war planning.

Inventory (Preliminary) OPA - 1941-1944

BOX 8 FUEL RATIONING: Various Secret and Confidential Reports, Plans and Directives - Folder 47

47. Studies and Policy Statements. Includes two letters from H. Ickes to Donald Nelson complaining about Prentiss Brown. Includes also folder on miscellaneous "administrative problems" in fuel rationing program.

BOX 9 FUEL RATIONING

Various memoranda, bulletins; progress reports, industry letters, notes. Contains folder of documents gathered by J.D. for proposed history of gasoline rationing; PIWC: petroleum supply reports (1942) mileage rationing, gas rationing.

BOX 10 FUEL RATIONING: J.D. PERSONAL - MISCELLANEOUS (1944) FILES

Confidential letters, memoranda, reports - all highly confidential at the time -; rationing forms, fuel rationing workshop folder, amendments to fuel rationing regulations, memo and booklet on rubber shortage; memo on nationwide gasoline rationing plan; Ellender (L.a.) bill to conserve existing stocks of rubber; WPB memo on rubber shortage, and passenger transportation; statistical controls (fuel rationing); fuel oil rationing: press releases (1942-43).

BOX 11 GASOLINE

Includes gasoline regulation booklets, various bulletins, directives and releases pertaining to gasoline rationing; press releases: gasoline; press releases: J.D.'s desk; "fan mail" (responses to J.D.'s letter telling of his retirement from OPA). Fuel Section, Gasoline Supply; Inter-Agency Memoranda; training manual for fuel rationing field force.

BOX 12 OPA 1942-1944

"Development of the Fuel Oil Rationing Program", by Joel Dean and L. C. Vass (Confidential) (Apparently, an attempt at a history

BOX 12 OPA 1942-1944 (Continued)

of the Fuel and Rationing Program, 1942-1944, under the auspices or request of the commission on Records of War Administration); "Need for Immediate National Gas Rationing" (a folder of educational memoranda); Gasoline-mileage (various memos and documents relating to gas rationing -- possibly being brought together to compile a later monograph); "Lesson of Mistakes: Gas Rationing" (memo of mistakes in the program); "Read" (memos, docket, statements on various aspects of the fuel, specifically, gas, rationing program).

BOX 13 Forms, coupon booklets, memoranda, rationing plans, document registers pertaining to gas rationing; Educational memoranda (raw material); Field Liaison Offices (Fuel Rationing Staff) (list of regional staff offices and directors); Educational Memoranda -- gasoline, monograph (carbons of various documents and statements, statistics, memos possibly brought together to aid in the preparation of a monograph by J.D.); various reports (quarterly - from OPA - Administrator statements and monographs).

BOX 14 CHAPTER I - HISTORY OF PLANNING (FUEL OIL) - (Early outlines and drafts of the Fuel Oil Report)-(SEE BOX 12)

Ration Records Project (various 1942 memos, minutes of policy sessions, etc.) Master Copy of Most Recent Draft - Chapter I (drafts of initial chapter and preface of Fuel Oil Report); Master Copy and Other Drafts - Chapter II (of Fuel Oil Report); Master Copy of Most Recent Draft - Chapter III; General Outline for Chapters (for Fuel Oil Report); Control File (later outlines of chapter headings and contents for fuel monograph). Early Planning Document -- Gasoline -- J.D. envelope (various documents pertaining to planning sessions, ca. 1942, relative to setting up fuel rationing program).

BOX 15 "Joel Dean's Gasoline Rationing Archives" (manila envelope containing material apparently gathered by J.D.; folders entitled "Committees"; "Congressional Contacts"; "Ingenious Schemes for Gasoline Rationing"; "Problems" - contains largely 1942 memos, correspondence, reports, directives and sample gasoline rationing booklet); OPA -- First Quarterly Report - 4/30/42 (Leon Henderson); "Utility" Program of British Board of Trade. Report by Dexter Keezer, Deputy Administrator-OPA; Fuel Oil Opus, Chapter XI - Public Reaction; Chapter X, "Top Level Politics of Rationing Fuel Oil" (secret and confidential memos and reports from Nelson, Patterson, Forrestal, Ickes, etc., re pipelines from Texas to New York - Philadelphia - 1942-43 (apparently gathered by J.D. for background in fuel monograph)).

BOX 16 Spec. Memo re gasoline rationing systems of Canal Zone and Republic of Panama -- 9/13/26/42 to J.D. from Cecil G. Tilton; Check Book Plan (Chicago) outline for Chapter II of Fuel Monograph; notes for Chapter IV (memos, plans -- fuel rationing); Fuel Oil Monograph - Chapters III and IV; Fuel Oil Monograph - Chapter V; Fuel Oil Monograph - Chapters VI and VII (includes supporting memos, reports and articles); General Material (re the fuel monograph, notes, suggestions, etc.); Chapter X, "Fun in Rationing" (anecdotes, jokes, including J.D.'s request for replacement).

BOX 17 FORD MOTOR COMPANY

Confidential Report on "Results of Third Sales Experiment in Reader's Digest", by R. J. Eggert to L. A. Iacocca, Incidence of Repairs, 1957-1962 Models (marketing research report on Ford cars and competitive models -- 5/25/64); Second copy of foregoing report with memo to Joel Dean from Robert W. Russell-Marketing-5/25/64; Dean's copy of "Survey of non-Ford Dealer's Service Buyers in Houston and Providence", from R. J. Eggert to L. A. Iacocca - 5/9/62; confidential research report (Dean's copy) from Eggert to Iacocca re: 1964 Galaxie IV, 8/22/62; Product Complexity Study - 2/26/62 (sent to J.D. with covering letter from R. W. Chambers, Director - Marketing Plans; report dated 2/27/62 from Eggert to Iacocca re: "Changes in the Structure of Automobile Retailing", (J.D.'s copy); report on "Owner Loyalty Among Customer Complainers" (from Eggert to Iacocca dated 4/30/62; Ford public relations release of 6/23/55, statement of Lewis D. Crusoe before the Senate sub-committee on anti-trust and monopoly legislation. JDA associates notes on meeting at FMC 11/15/61 on "The Future of the Franchised Dealer"; "The Challenges and Opportunities of the Future for Dealers", text and background materials of Benson Ford's address before Ford executives at Greenbrier, West Virginia, 11/60, which J.D. prepared; Marketing Research Report, "Bench Mark Study of 1962 Ford Registered Owner Plan", 4/26/62. Confidential Ford Division purchasing office report on "Overseas Procurement of Production Parts". Ford Advertising, 1954-1955 (notes and correspondence relating to JDA taking on various Ford Motor Company assignments); Priest Bill, 1955-56 (Notes and commentary re: HR 11500, a bill affecting the automotive industry).

BOX 18 Foreign Auto Producers Study plus Ford, Europe, 11/21/58, (JDA memoranda, confidential reports, analyses, notebook, etc.); Ford Advertising Economics, 1954 and later, (notebook of memoranda, marketing, reports, etc.); Kilgore Committee Hearing, 6/23/55 - Questions and Answers (notebook of short answers drafted by JD and others to reply to questions submitted by sub-committee on anti-trust and monopoly legislation of the Judiciary Committee).

- BOX 19 Automobile Transportation in Defense or War (booklet-report prepared by Wilfred Owen, Brookings Institution for the Defense Transport Administration, Washington, D. C., October, 1951); Typewritten (1-18-52) draft of application by FMC to U. S. Department of Commerce, National Production Authority for relief, exception, etc., re production schedules under Controlled Materials Plan; compilation of contemporaneous published statements bearing on competitive conditions in the automotive industry, 1/47-6/49: "Exhibit 50"; Exhibits 1 - 20 + charts, etc. (various letters, minutes, orders, memoranda from National Production Authority 1951-52); Final version of Relief Application (see above) and supporting exhibits (Exhibits 1 - 20^{4, B} above); Kilgore Committee questions (outlines of answers to possible questions, etc.). (Nos. 1-2 + A)
- BOX 20 Notebook (unlabeled) containing various J.D. memoranda, reports, analyses, exhibits, reports of strategy sessions and advice re upcoming Clayton Act (Section 7) government anti-trust suit against FMC (1960); Ford meetings - November, 1961 (contains J.D. copies of marketing advice re various company plans, marketing strategy meetings, notes, etc. - 1961); Ford Dealer Bill Testimony and questions and answers, June, 1956, (includes printed statements by Henry Ford II, Lewis Crusoe, Chrysler Corporation; HR 11500 (copy), Hufstader - GM, etc.).
- BOX 21 Ford Meeting, March, 1962 (Notebook - Forward Marketing Strategy Meeting between J.D. and Ford Division executives); Black notebook, ca. 1949-52 with various memos, reports, statistical tables, chronologies, etc., pertaining to FMC actions during those years; Ford Meeting, November, 1962, (Agenda items - largely forward marketing strategy - for series of meetings J.D. had with Product Planning Staff at FMC). Ford Product Planning, Spring, 1963 (black notebook containing correspondence, agendas, reports, position papers, etc., on market planning).
- BOX 22 Ford Personal Car Leasing --- JDA Study (includes Dealer Selection reports, 1964); Ford Meetings, February, 1964 (forward marketing and product strategy meetings - includes agenda and various presentation memos and discussion drafts -- marginal commentary by J.D.); Ford-JDA memoranda re marketing strategies and forward marketing planning -- specifically: "Ford Mini-car", "Thunderbird-Ford marriage", "Disassociating Mercury from Ford Image", etc., - 1963-1964); Ford-JDA memoranda, especially review of Canadian operations, (10/25/63).

- BOX 23 Forward Product & Marketing Strategy Meeting, 8/6/63. (Contains agenda, memos on Lincoln, Continental, Chrysler's 5/50 Warranty; Forward Comet Programs; Light car programs for 1966); 10/23/63: Memorandum: "Strategies for Dealing with Challenges from Chrysler" involving fleet and leasing and dealership real estate matters.
- BOX 24 Blue notebook containing anti-monopoly materials gathered for J.D.'s appearance before anti-trust sub-committee of Senate Judiciary Committee 4/30/59. (Corporate and private statements - some given under oath, etc.) ("Price Increase - Pre-Notification: S215").
- BOX 25 FORD - GLOBAL
- JDA-collection of plans, bibliographies, memos, reports, etc., ca. 1960. Commissioned survey on Ford's global expansion. Global-Comparative Advantage-Progress Report #4-Great Britain: Various materials compiled looking toward a study on the United Kingdom; Nos. 1 (Europe vs. U.S.); #2 (Germany vs. U.S.); #3 2 copies (Mexico vs. U.S.).
- BOX 26 FORD - GLOBAL
- Comparative Cost Study. Various memoranda, progress reports, presentations, comparative studies, correspondence ca. 1960; Ford-Global-trademark and nomenclature study (JDA).
- BOX 27 FORD MARKETING, 1958
- Correspondence - J.D.-Lundy, McNamara, Eggert, et al; "Turnover Pricing of Repair Parts" - 12/58 (includes hardware and accessories, division profit plan, and investigation of merger possibilities with O'Leary Corporation); "Economic Analysis of Uniform Delivered Pricing for the XKTB", 11/20/58; "Comments on the Parts & Service Study Outline", 11/58; Parts & Accessions-Product Line & Distribution, 9/26/58; "Recent & Prospective Sales Incentive Programs" (and other memos) 6/58; N.A.D.A., "Equality of Competitive Opportunity Program", 3/27/58 (JDA memo); "Critical Factors Determining the Future Pattern of Retail Distribution", 3/20/58 (JDA Memo); "The Economy Car" (Discussion Draft) 3/18/58 (JDA Memo); Style Forecasting Assignment, 3/12/58; Statement by T. O. Yntema before Senate Anti-Trust Committee, 2/4/58; (news release); "Study Plan for Volume Discounts", 2/58 (JDA Memo); Kefauver Hearing Memos (J.D.); "Cross-Selling" (copies of inter-company memos on

BOX 27 FORD MARKETING, 1958 (Continued)

cross-selling and other related matters); Priest Bill Testimony (statement of J.D. before sub-committee on automobile marketing practices of U.S. Senate Interstate & Foreign Commerce Committee, Washington, D. C., 6/12/56).

BOX 28 FORD MARKETING, 1959

Ford - JDA Correspondence - 1959 (Miscellaneous correspondence including copies of various memos, studies, reports, etc., on various marketing matters); Ford-Contact File (miscellaneous correspondence with Ford executives, some important, some routine thank yous and enclosures types); "English Ford Distribution in U.S.", 12/19/59 - memo prepared by JDA urging continuance of distribution of English Ford line thru Lincoln-Mercury dealers; comment on "Dealer Capital Financing Study", JDA report, 11/30/59; "Control over Retail Distribution", JDA report; "Evaluating Recent Chrysler Actions re: Product Lines & Distribution", 10/9/59 (JDA Memo); "Desirability of Twin Product Lines & Competing Full Price Range Distribution Networks", 9/15/59 (JDA Memo); "Demand Analysis Project", 6/18/59 (JDA Memo); "Ford Division 1960 Model Introduction Dates", 5/6/59 (JDA Memo - suggests a delay of 2-3 weeks of introduction of standard size Fords); "Common Ford Parts Pricing & Distribution", 4/1/59 (JDA - 12-page Memo); "Cost of Car Ownership Study", 3/26/59 (JDA Memo - 3 pages); "Study of Competitive Conditions in the World Automotive Market", 3/13/59 (JDA Memo); Salary Structure Study (analysis of compensation of salaried employees); "Notes on Product Planning for Twin-Line Divisions", (1959);

Ford-Mars -- Work Sheets & Memos (various drafts of positions and suggestions re proposed merger, 1960); Ford-Mars, Background Material (various drafts, graphs, reports, research notes re proposed merger, ca. mid-60); International Division Assignment (Ford-International), 1959.

BOX 29 FORD MARKETING, 1960

Ford Correspondence, 1960 (letters, reports, memos to various Ford marketing people of the time (McNamara, Eggert, Secret, Lorenz, Yntema (stock option plan); notes on Product Planning for Twin-Line Divisions, 11/17/60. "Forward Product Strategy" - Meeting of 11/15/60; (possible agenda items on Ford-JDA discussion of forward planning); "Multiple Series for the Canadian X", 11/14/60 (marketing analysis by JDA); Tractor Correspondence and

BOX 29 FORD MARKETING, 1960 (Continued)

Memos, 1960 (marketing assistance); "Increasing Efficiency in Marketing" (R. Eggert paper given before Boston Conference on Distribution, October 17-19, 1960); Trim Options (yellow copies) 10/3/60 (JDA thoughts on trim option strategy; forward product strategy - Tempest vs. Falcon approach to trim options; effect of options on Falcon; trim option planning).

Trucks (JDA memo commenting on FMC-Marketing Staff-"Analysis of Ford's Truck Business"; Booklet: "Cost Analysis for Competitive Railroad Rate Making", Joel Dean; JDA's copy of confidential report, "Analysis of Ford's Truck Business", mid-1960; United Shoe Machinery Corporation-Ford Global (rough draft, productivity comparison; letter to Walter Hertz, United Shoe Machinery Corporation, International Division); "Analysis of the Tractor Sourcing Decision", 9/30/60 (JDA Memo with covering letter to Charles Beck, Business Planning Office; "Comments in World Wide Tractor Study", 9/16/60 (JDA 13-page memorandum on their reactions to 9/2 draft report of World Tractor Study Committee); Cyclical Changes in Consumer Credit Lending Policies", 9/16/60 (memo for National Bureau of Economic Research - copy sent to S. N. Kuryla, FMC); Administrative Credit Standards of Finance Institutions, J.D. correspondence, 1960; Salary Distribution Study (1930-60); correspondence and memoranda, 1960; "Future of the Dealer", 1960 (various presentations, talks, transcriptions of discussions in which McNamara, Mills, Wright & Benson Ford and J.D. participated in the Fall of 1960); "Styling Research", 8/24/60 (a JDA research and analysis memo explaining and making recommendations re the Company's styling program); Forward Product Strategy, 8/25/60 (contains JDA Memo to McNamara on "Forward Product & Pricing Strategy", with earlier drafts & supporting material; "Fourth Quarter Market Share Forecasts", 7/13/60 (copies of JDA memorandum to McNamara which "takes issue with current projections for the Company's market penetration during the final quarter of 1960"); Forward Project-Plans (1960) (Presentations, memos, analyses, correspondence, etc., dealing with top level forward product planning in late 60's).

BOX 30 FORD MARKETING, 1960

1961 Thunderbird - Tables, charts, and materials, 1960. (JDA memoranda proposals, including one on "1963 Product Program"); "1961 Thunderbird Product Program", 5/20/60; (2 copies of an early 1960 JDA Memo expressing doubts about the 1961 Thunderbird design); Mercury-Dart, 1960 (various JDA & FMC memos in draft and copies explaining several facets of 1961 Mercury merchandising programs); JDA Projects, 1960 (various memos and proposals on knotty problems of Ford merchandising); "Lincoln as a Family Name",

BOX 30 FORD MARKETING, 1960 (Continued)

3/9/60 (JDA Memo on desirability of Lincoln as unifying symbol); "The Future of Medium Priced Brands", 5/3/60 (JDA Memo suggesting resurgence of medium priced brands in future); "1963 Product Program", 4/29/60 (final, file copy of memo listed in Folder 1 above); "Research for Near-Term Product and Pricing Decisions", 2/11/60. (JDA Memo on possible impact of compact cars in the near future); "Comments on Lincoln-Mercury Future Product Research Program", 1/28/60 (JDA draft memo of Mercury-Ford, Dodge-Dart, Lincoln-Continental sales prospects in 1961-62. Also includes inter-agency memo on genesis of stock option study); "Direct Ownership and Operation of Retail Outlets", 1/12/60 (Extensive JDA memorandum on a possible FMC merchandising move); "Dealer Capital Assistance", 1/7/60 (2 copies of a JDA memorandum explaining another facet of a possible expanded Company program to strengthen dealer network); "Nepotism in the Dealer Network: General Motors' Achilles Heel?" (Another JDA proposal to firm up dealerships); Owner Loyalty - 1960 (JDA Memo entitled "The Significance and Measurement of Owner Loyalty" - 1st draft as well as early version of "Customer Loyalty" memo, various FMC marketing research charts; pencil draft of "Interpreting Michigan New Car Registration and Trade-In Data"); "Growth, Diversification and Acquisitions" (6 part JDA memorandum on FMC's diversification problems-major effort); "Financial Assistance to Dealer Development" (carbon draft of JDA appraisal of FMC's possible moves in this area). Ford: Product Policy: Cardinal. Law of Station Wagon Gravitation (apparently, J.D.'s 1st Law of Station Wagon Gravitation); "Comments on Proposed Parts and Service Study Relating Study to the Issue" (File copy of JDA Memo); "Ford-Mars-Economic Opinion", (major JDA opinion on proposed acquisition of Mars (possible pseudonym) for major battery and electrical equipment supplier (Autolite) to automotive industry) by FMC. Three copies including J.D.'s copy with backup papers inside; Ford-Mars-yellow copies of reports (extra copies of original opinion plus backup material and correspondence).

BOX 31 FORD MARKETING, 1960

Ford-Mars-Memo and correspondence (Correspondence notes corporate decision against acquiring Mars was made between 6/30 and 8/23/60); Ford-Mars "Economic Opinion", 7/11/60 (incomplete version); Ford-Mars-"Preliminary Injunction Trial", 6/22/60 (preliminary arguments for acquisition); "Ford-Mars-Forecasted Outcome of Government Suit for Preliminary Injunction Against the Acquisition", 6/20/60. (J.D.'s opinion on government action and probable outcome of injunction trial; Ford-Mars "Suggestions for Grand Strategy in Anti-Trust Aspect of Mars Acquisition", 6/20/60, (memo and backup material); Ford-Mars-"Analytical Preparation for Consent Decree

BOX 31 FORD MARKETING, 1960 (Continued)

Needed Now", 6/20/60, (Arguments for the desirability of a consent decree); Ford-Mars-"Economic Analysis", 6/22/60. (Complete set, 3 parts; incomplete set; memo on "Future of the Medium Priced Brands"); Ford-Mars "Outline of Probable Government Case"); Ford-Mars-Economic Opinion of Effects in Competition (corrected yellow copy of major JDA opinion, 6/11/60); Unconnected material in Mars area; "Replacement Parts Market-Trend of Ford's Share of Market for Parts for Ford Vehicles", draft exhibits, later draft version of "Ford-Mars-Economic Opinion of Effects on Competition"); Priest Bill, 1956 (various correspondence and commentary on effects of HR11500) Ford-Canada-Product Policy (various memos and analyses of Ford Canadian policy); "Analysis of the "Canadian Market Review" (8/25/58 JDA-commentary on Ford marketing study). FMC-Global-Summary of U.K. and West German data on Earnings, Productivity and Unit Labor Costs (major JDA Memo with tables)-Planning for Ford, Europe, 5/14/59. ("Discussion Draft A" -- Ford's participation in the Common Market-JDA Memo, 17 pages); "Notes for Conference 7/21/59" - 5/18/59, (JDA Memo comparing two plans of organization of Ford-Europe operations); Ford-International-Notes on Conference, 7/21/59. (Final version of the memo above); Ford-Global-comparative advantage study #3 for Germany, (major JDA report). Ford-International-Notes on meeting, 8/20/59, (J.D. notes with additional observations on meeting held in Dearborn at Tom Lilley's request); Ford-International-Interim Organization for Ford in Europe, 8/3/59, (Memo outlining plan for 1960-65 compatible with long-run plan 1965 and beyond.

BOX 32 FORD MARKETING - GLOBAL - 1960

Ford-International-Proposed Expansion by Ford of England, 3/22/60, (3-1/2 page JDA Memo to Secrest); "Global Comparative Advantage Study", 5/13/60. (JDA Memo "sketching program for carrying out international economics project Secrest outlined earlier in Dearborn"); Ford-Global-Comparative Advantage Study-Progress Reports, 7/60, (#2 dealing with wages and unit labor costs in Germany and #2 dealing with same subject on Mexico, including background study on glass needs); Prices of sheet steel in Europe and the United States, 7/1/60, (staff report #1); Cost Data for Foundries, 8/24/60 (two copies of inter-company communication-C. V. Talbot to A. H. Baune); "Some Further Thoughts Occasioned by Comments on our "Capital-Labor Mix Memo", 11/15/60, (carbon file copies of JDA follow-up memo); "Possible Lines of Further Research", 11/15/60, (JDA's Global Comparative Advantage Study); "Productivity Comparisons, Western Europe", 11/15/60, (extension of GCA Study); List of Foreign Contacts (on Ford Global Study); Glass, Starters Cost Data (two studies prepared by the appropriate divisions with commentary by JDA); Investment in European Steel Producing Facilities (set of recommendations preparatory to building

BOX 32 FORD MARKETING - GLOBAL - 1960 (Continued)

Belgian Steel Mill-authorship uncertain, probably JDA); Werner Chilton Reports (various drafts of the JDA staff member who apparently was mainly responsible for Global Comparative Advantage Study, 1960); W. Chilton Copy for Second Progress Report, 8/60, (Chilton's original copies of Reports Nos. 3 and 4 on Mexico and Germany of GCAS); Comparative Advantage Progress Report #4 - Great Britain (Major seven-part report prepared by JDA including two company reports on Mexico and Germany and Great Britain based on JDA reports); Ford-1960-61 Weakness (Early version or draft of JDA Memo on Ford's penetration problems).

BOX 33 FORD MARKETING, 1961

Correspondence re: Belgian Steel Mill Proposal, 1/61, (preliminary economic analysis plus relevant correspondence and backup dates plus draft of proposed "Distribution of Tractors and Implements, 1/2/61, (2 copies with correspondence, Ford-Global-Comparative Advantage Study-West German Productivity Estimates, 1/11/61, (Major JDA effort); Comments on Study of Foreign Auto Producers (JDA Memo). "In Defense of Purchase of Minority Interest of Ford of England", 1/13/61, (JDA commentary on public criticisms of above move); "Corporate Investment Program", 1/25/61, (yellow copies of memo sub-titled "Major Screening Criteria for Industries in which to invest Ford Money", including addition entitled "Objective: Make Ford Stock Sell Higher"); "Determining the Optimism Advertising Budget", 2/10/61, (copy of original JDA Memo plus Marketing Research reactions); Advertise, 2/14/61, (Original of Marketing Research commentary on JDA advertising memo, plus copies of JDA memo on "Sales Weakness of the 1960 and 1961 Standard Ford Car", including notes, drafts, FMC memos, backup material, articles, etc. on advertising); "Names for 1962-63 Car Lines", 2/15/61; (Memo-JDA-in response agenda item on February Forward Product Strategy Meeting); Letter to J. O. Wright re: Naming the Canadian X, 2/28/61; Correspondence re: Cost study and Werner Chilton (the latter's affiliation with FMC); Wage Rates, Productivity and Price Trends - United Kingdom, West Germany, and the United States; Review of British Labor Costs and Productivity Trends (by Ford, 3/8/61) (Ford-produced study). "Uniform National Advertised Price", 3/20/60 (?), (JDA draft memo considering the advantages and pitfalls of this proposed policy); Ford Diversification, 3/22/61, (JDA copy memo on "Minimum Acceptable Rate of Return for Ford on Diversification Investment", including 4/14/61 letter to T. O. Yntema); World-wide Trademark and Product Nomenclature Study, 3/10/61, (Commenting on a recurring theme for FMC in the early 1960's). "Minimum Acceptable Rate of Return for Ford on Diversification Investments, 3/22/61, (continuing JDA exploration into diversification possibilities); "Reactions to 1963 Falcon Product Change Program, 3/28/61, (endorsement of Company policy to

BOX 33 FORD MARKETING, 1961 (Continued)

extend basic Falcon unchanged through the 1965 model run); "Pricing XKT-Bird and Volume Estimation", 3/61, (Ford Motor Company studies on Falcon and Thunderbird pricing: Includes JDA study entitled "Outside Directors Appraise Stock Options" with revisions, May 10-19, 1961); "Rate of Return Premium Required on Overseas Investments", 4/5/61, (JDA Memo sent to Charles Beck, FMC; "Pricing 1962 Models", 5/3/61, (4 copies) JDA memo to J. O. Wright concerning the Chevrolet Corvair and the 1962 Fairlane; "Convertible and Futura-Type Vehicles", 5/5/61, (two copies of JDA Memo to J. O. Wright including inserts and working data plus FMC executive communication on 1963 Falcon Convertible); "Quality Sales Manpower Program", 5/5/61, (file copy of memo prepared for Secrest-Wright); Miscellaneous Material re: 11/16/60 and May 11-12, 1961 Meetings (memos, correspondence, etc.); Pricing 1962 models, May, 1961 (miscellaneous copies and memos related to 5/3/61 study above).

BOX 34 FORD-MARKETING

Peugeot: A Potential Acquisition, 9/25/61, (A preliminary analysis by JDA with statistical appendix; Peugeot (10/4/61 correspondence); "Forward Product and Marketing Strategy Meeting", 10/12/61, (JDA Memo subtitled "Notes on Observations on European Automotive Manufacturing and Markets"); "Financial Assistance for Dealer Development Purposes", 10/26/61, (authorship uncertain, probably JDA draft version of memo); "Future of the Monterey", 11/15/61, (JDA study of the pros and cons including styling); "Style Change Strategy for Different Car-Lines", 11/15/61, (JDA Memo looking toward post-1964 style changes); "Forward Product and Marketing Strategy: Economy Car Market and the Cardinal A", 11/15/61, (JDA Memo); "Future of the Franchised Dealer", 11/21/61, (JDA notes on 11/15/61 Ford-Dearborn meeting); "Suggestions for Advanced Marketing Seminar", 11/22/61, (JDA Memo); "Pricing Strategy for Cardinal A", 11/27/61, (JDA Memo suggests low pricing); New Electric Autolite File, 11/30/61, (JDA-Ford executive correspondence re: participation in Autolite anti-trust suit); "The 2-passenger personal car", 11/30/61, (JDA Memo on market and source); Correspondence - 1961 (mostly covering letters and other interesting miscellany); Correspondence re: Potential Employees Referred-1961. "1962 Model Price Structure (Tables)", 5/9/61, (JDA Memo); Automotive Service Center Correspondence, 6/6/62, (includes draft JDA Memo plus related correspondence); "Unfavorable Level and Trend in Relative Used-Car Prices", 7/5/62, (Discussion draft B of JDA Memo); "Design Cost Subsidy", 7/5/62, (JDA Memo-issues, assumptions and analysis); "Company-Owned Automotive Service Centers", 7/6/62, (JDA Memo re: Fairlane and Falcon for 1965-66); "Assignment of

BOX 34 FORD-MARKETING (Continued)

Responsibilities in Automotive Distribution -- Outline of Issues", 8/15/62, (JDA discussion draft).

BOX 35 FORD-MARKETING - 1963-64

Response to Chrysler's 5/50 Warranty, 7/31/63, (JDA Memo on an agenda item for upcoming forward planning and marketing strategy meeting); Ford-Autolite Division (J.D. correspondence); Ford Real Estate, 8/5-6/63 Meeting, (brochures, drafts and notes by J.D. on selecting real estate agency); Thunderbird-Ford Marriage, 10/21/63, (JDA Memorandum); Possible Business Planning Assignment, 8/15/63, (J.D. inter-office memo draft); New Assignment, 11/12/63, (inter-office notes); Ford-Correspondence-1963 (interesting details on JDA relationship); Seminar Notes on Stock Options and Public Policy, 3/63, (JDA publication); Background: Interpretation of Buying Intentions Data (JDA memo with routing correspondence); Long-Range Strategy for Lincoln-Mercury Division, 1/28/64, (JDA Memorandum); Cut-Off Criterion for Capital Investments, 2/3/64, (JDA discussion draft memo); Preliminary Thoughts About a Mini-Car Ford (Agenda Item 6, February 4 Meeting), 2/10/64, (JDA Memo); Back-up Material, 2/64, (JDA assignments and FMC studies); Identifying Good Dealers, 3/3/64, (JDA Memo); Use of Buying Intentions, Survey Data in Forecasting Automobile Sales, 3/13/64, (JDA Memo); Economics of Dealer Selection, 9/12/64, (JDA Memo-discussion drafts); Economics of Vehicle Leasing, 8/12/64, (Major JDA Memo); Lincoln-Mercury Product Plans, 8/14/64, (Mercury Mustang preliminary questions and issues posed in draft form by J.D.); Long Term Consequences of Substantial Vehicle Leasing, 9/14/64, (JDA discussion draft including 12/64 FMC study on long-term leasing of 12/64 with interleaved commentary by J.D.); Notes on Ford Meetings 8/17-18/64 (dictated and hand-written notes by J.D.); Leasing Strategy Memo, 8/26/64, (J.D. draft memo, 1965 model year); Post-Meeting Material, 8/17-18/64, (draft discussions of areas JDA can be of help to FMC); Ford: Miscellaneous Pre-Meeting (correspondence, various drafts, background material, etc.).

BOX 36 FORD-MARKETING, 1964

Dealer Section Practices, Research Material, etc., (JDA Memo 11/5/64) "Dealer Selection Practices in Various Industries", plus various publications).

Ford Meetings, August, 1964, (various J.D. & JDA studies and presentations, some in draft form on advertising research, service parts, European dealer franchising, economics of dealer selection, long-run consequences, economic implications of leasing, Lincoln-Mercury

BOX 36 FORD-MARKETING, 1964 (Continued)

products, miscellaneous); FMC-Leasing Strategy for the 1965 Model Year, 9/1/64, (JDA discussion draft study); Tariff Commission Search, 9/3/64, (JDA search for possible candidates for Tariff Commission vacancies; Advertising Policy, 10/28/64, (JDA study of mass-media vs. mail promotions and suggestions for strategy); Dealer Selection Practices-Interview notes and bibliography, 11/5/64, (various raw materials); Real Estate, 11/9/64, (correspondence and a JDA study "The Real-Estate Developer and Dealer Facilities", 11/9/64). Research on Personal Vehicle Leasing, 12/21/64, (JDA Study); "Long-run strategy for Ford Participation in the Service & Parts Market"; Promotional Outlays: Concept, Measurement and Effectiveness, 1964, (JDA Memo); Strategy for Dealing with Challenges from Chrysler, 1964, (JDA Memo); Minute Memos, 1964, (miscellaneous marketing matters); Ford Correspondence, 1964, (miscellaneous, but important).

BOX 37 FORD-MARKETING, 1965

What Causes Ford Resale Price Disadvantage, 2/2/65, (JDA memorandum); Economics of Service Parts Pricing and Distribution, 2/8/65, (JDA discussion memo draft); Reactions to Finance Staff Long-Term Leasing Study, 2/23/65, (JDA Memo); How Many Cars and How Much Commonality for Ford-Europe, 9/7/65, (JDA Memo); (John S.) Andrews-Europe: Think Piece #1, 9/7/65, (JDA Study); Folder containing copies of correspondence and JDA reports on advertising policy, dealer selection, personal leasing market research and FMC marketing reports; Ford leasing memos-interviews, 1964-65; Notes for Fred Secrest Meeting, 6/23/65; Double Overtime Bill-Bugas (John), 7/2/65, (Various versions of a presentation prepared by JDA for Bugas' appearance as automotive industry spokesman at hearings on bill). How To Prepare For American Motors Dropout, 9/15/65, (JDA Memo); John Andrews Proposal Letter, 9/23/64, (JDA proposal for international organization plus notes, etc.); Ford-Clippings and 1964 Annual Report.

BOX 38 FORD-GLOBAL MARKETING, 1965-66

Andrews (John S., European V-P): Basic Program for Objectives in Europe (Confidential report on long-range program); International Product Policy Notes (Various drafts and notes re: formulation of policy statement); Europe/Andrews: Think Piece #2: Tariff Penalized Owner-Body, 10/1/65, (JDA Memo "Should Ford-Europe Continue to Subsidize its Tariff-Penalized Owner Body?"); Same as above: two discussion draft copies; Andrews -- Think Piece Draft: "Twin Lining", 10/5/65, (draft version of "Theory of Twin Lining" (takeoffs or

BOX 38 FORD-GLOBAL MARKETING, 1965-66 (Continued)

Siblings); Andrews-Balance of Payment: Think piece, Preliminary Notes, 10/6/65, (Balance of payments, etc.); Andrews-Europe: Think Piece #3: Vertical Integration for Ford-Europe, 10/10/65; (notes and finished memo); Andrews - Think Piece #4: "Two Dealer Networks or One?", 10/29/65, (notes and finished copy of memo); Andrews - Comments on List of Think Pieces (proposal), 10/12/65; Ford International Correspondence and Memos (1965, includes 1957 report by Harder & Davis of European tour of Ford plants); Ford Precision-Puerto Rico, 1965, (JDA Report of inspection tour); Correspondence and Memoranda, 1965; Bugas' Statement on H.R.8259 "Fair Labor Standards Amendments of 1965"; Survey 2/25/66 on Company Employee Buying Habits (Ford Market Research Report).

BOX 39 CHRYSLER-MARKETING, 1956-1957

Chrysler Correspondence, 1956-57 (including JDA consulting agreement); Chrysler Corporation-Cost of Capital, 11/27/56, (JDA Study); Memos (List of special memos-Chrysler assignment, 5/15/56); Chrysler Who's Who: Central Facilities Planning, November 29, 1956, (JDA Memo); Engineering Assignments, 11/23/56, (Notes and copy of engineering study); Cost of Capital (another copy of above); Cost of Capital: Exhibits for Executive Presentation, 12/3/56; Cost of Capital (Charts and Worksheets, including those not used); Assignments, 3/28/57; Owen Keeler, Personal, 6/9/56-57, (Correspondence, resumes); Candidates, 1956-57, (correspondence and resumes re: Chrysler position). Proposal Letter, 4/10/56, (copy of JDA letter outlining Chrysler consulting proposal); Minutes of 5/18/56 Meeting (formal notes on the Chrysler discussion meeting); Training Program 12/19/56 (proposed series of executive seminars to be undertaken by JDA for Chrysler management); Minutes of Meeting of 6/13/56 (JDA meeting with Chrysler management, draft and final version); Conflicts of Interest Memo (intra-divisional procurement);

Transfer Prices (offprint of 1956 article on oil products market); Compensation Notes, October-December, 1956 (Executive Compensation Notes and Study); Cost of Capital (covering letter from author of report); Product Manager Organization Structure (J.D. draft version of memo); Cost of Capital, Drafts of Exhibits for Executive Presentation, 12/3/56; "Make or Buy", 10/10/56, (Apparently JDA Study of Chrysler sourcing problems and decisions for the future published by Chrysler); "A Cost Information System for Planning and Control of Future Vehicle Costs", JDA Chrysler Study, 6/13/56.

BOX 40 CHRYSLER

Chrysler-Miscellaneous Notes, 4/9/56, (Notes-JDA on Issues and background of assignments); Target Costs for Planning and Control of Future Vehicle Costs, 5/16/56, (Chrysler Study); The Concept of Cost for Target Costing, 5/1/56, (JDA-Study); Proposed Program for Divisionalization of Sourcing, 5/10/56, (JDA rough draft); Target Cost Information System for Planning and Control of Future Vehicle Costs, 9/13/56, (Chrysler Study); Proposal for Establishment of New Product and Volume Planning Department, 9/21/56, (Chrysler Study); Target Cost System for Planning Future Vehicles Costs - #2 Draft - 6/1/56 (JDA Chrysler Study); Target Costs, Standard Costs and Transfer Pricing-undated (1956?) (JDA Study); Some Comments on "Possible Plans for Reporting Performance Against Target Costs", 4/3/56, (JDA Study); "Decisions on Common Parts and Parts Peculiar", 7/6/56, (JDA Study); Special Memos on Chrysler Assignment for May 18, 1956 Meeting in Detroit (JDA's copy); Make or Buy Decisions: Economics and Organization, 5/29/56, (JDA Study); Concept of Cost for Target Costing, 5/1/56, (JDA discussion draft); Evaluating Divisional Performance, 7/9/56 (JDA Study); The Relation of Capital Management to Divisional Decentralization, 6/1/56, (JDA Study).

BOX 41 CHRYSLER

The Philosophy of Decentralization, 6/1/56, (JDA Study); Profit Center Boundaries, 6/8/56, (JDA Study); Proposed Program for the Divisionalization of Sourcing, 5/10/56, (JDA (rough draft) Study); Functional Organization vs. Product-Line Organization, 12/28/56, (JDA Study); Cost of Capital, 11/27/56, (JDA Study); Executive Compensation in a Profit Center Organization, 11/7/56, (JDA Study); "Comments on 'Target Costs for Planning and Control of Future Vehicle Costs'", 5/28/56, (JDA-Chrysler draft dated 5/16/56); Organizational Effects of the Proposal to Assemble all DeSotos at Plants of other Divisions, 12/4/56, (JDA-Chrysler draft study).

END OF CHRYSLER MATERIALS.

BOX 42 SOCONY-VACUUM OIL COMPANY - MARKETING (Water Damaged)

How to Determine Whether to Dispose of a Marketing Investment, (J.D.-Socony-Vacuum Study); How to Allocate the Capital Budget for Marketing, (J.D.-Socony-Vacuum Study); Truck Replacement Policy, Socony-Vacuum Eastern Marketing Region (undated, unknown authorship); Investment Memorandum #2, "How to Determine the Area in Which New Service Investments Should Be Made"; "How to Estimate the Productivity of Capital", (J.D.-Socony-Vacuum Oil marketing study); Memorandum #8: "Random Reflections on Forms Control", 12/1/44, (J.D. Memo); "Purchasing Policy Report #1: Appraisal of Program for Purchasing Products for Price Advantage", (J.D. Study).

BOX 43 SOCONY-VACUUM OIL COMPANY - MARKETING

S-V Truck Replacement Policy Meeting, 2/14/46, (agenda, summary, etc.); Memorandum #10: "Key Cost Concepts of Managerial Economics", 11/17/44, (JDA monograph); Memorandum #9: "How to Make More Use of Cost Survey Results", 1/15/45, (JD Memo). Program of Product Purchase, Product Change and Inter-Refinery Sales (undated but apparently J.D. Memo); Memo #6: "Profit Margin Policy for Structure Prices", 2/15/45, (2 copies J.D. Memo); Memo #5: "Administration of the Cost Survey", 1/24/44, (J.D. Memo); Memo #3: "Fundamental Problems of Determining Structure Costs", 1/30/45, (J.D. Memo); Memo #7: "How Should We Measure Performance by Divisions?", 10/25/44, (J.D. Memo); Memo #4: "Determination of Individual Components of Structure Cost", 1/19/44, (J.D.-Socony-Vacuum Marketing Study).

BOX 44 MISCELLANEOUS MARKETING MATERIALS - FORD-GM-ETC., 1954-1963

American Economic Review, May, 1954; T. O. Yntema (1961) Statement on Automobile Sales Financing and Insurance re: HR71; Lincoln-Mercury Marketing Report on dealers inventory, 10/62; Lincoln-Mercury Marketing Report-Buying Intentions, 11/29/61; Lincoln-Mercury Marketing Research Report-New Car Price-Shopping Survey, 8/23/63; Study-Ford Satellite Service Center, 1/62; Sales Brochure, FMC, 1962; FMC-Canada-Market Research Study-Image Study-Six Low Priced Canadian Cars, 3/69;

Financial Report - GM by Stock appraisal firm, 2/63. Motor Business - 10/1963 (British marketing periodical); U. S. Senate, Hearings: Sub-Committee on Anti-Trust and Monopoly legislation of Committee of the Judiciary, 6/9/55.

END

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