



Dear Friends:

Columbus is home to a first-rate cultural community. In the last two years alone, we have experienced outstanding performances, exhibitions and programs from the Wexner Center, Columbus Jazz Orchestra, BalletMet, the Columbus Museum of Art, COSI, and many others.

We can be proud that cultural organizations in Columbus are a tremendously dogged and determined group. Recent years have been tremendously challenging to all businesses, including not-for-profit arts and cultural organizations. Thanks to dedicated leaders willing to make difficult decisions, local cultural organizations have weathered the storm remarkably well, while continuing to delight, challenge, and inspire their audiences.

We are also fortunate that the City of Columbus has maintained a strong commitment to funding the arts and culture, even in the face of serious budget shortfalls. This support has been critical to the survival of our cultural institutions. However, if we want to guarantee the long-term survival of our cultural assets, a strong city commitment to public funding is only one component. Long-term stability depends upon a balance of revenue sources, including endowments.

The enclosed research was commissioned by the Greater Columbus Arts Council and conducted by Benefactors Counsel, LLC. For a city that values the arts and culture as highly as we do, Columbus ranks surprisingly at the bottom in terms of endowments for cultural organizations. Endowments are not a silver bullet. But they are a crucial piece of the funding puzzle, and substantial endowments will be necessary to maintain the continued flourishing of our cultural community.

We appreciate any input or feedback you would like to provide.

Sincerely,

Mark Corna  
Chair, Board of Trustees

Ray Hanley  
President

# *Building Creative Capital*

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*Reflections on the assets available to sustain robust arts and culture in Columbus*

*Prepared for:*

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capital (*n*): a measure of the assets available to build a business. In general, companies with access to working capital will be more successful since they can expand and improve their operations.

### ***What is Creative Capital and why is it important?***

“Creative Capital” measures the assets that are readily available to advance the missions of artistic and cultural organizations: to create new works of enduring significance, present extraordinary exhibitions, produce grand performances, and inspire an ever-growing audience. Surely such activities have immeasurable intrinsic value—that’s why we give them tax-exempt status—but they also have concrete, measurable economic impact. The financial importance of these activities is far greater than the mere sum of organizations’ payrolls and the spending of audiences they attract. It is becoming increasingly clear that ***creativity itself*** is an essential ingredient in a community’s prosperity.

“Creativity has become the global gold standard for economic growth,” according to Alan M. Webber, founding editor of *Fast Company* magazine. Creativity guru Richard Florida asserts that the creative class now comprises more than 30% of the workforce. He states that “the choices these people make has already had a huge economic impact and in the future will determine which companies will prosper or go bankrupt, and even which cities will thrive or wither.”

Can Columbus attract and retain creative people sufficient to realize our artistic, cultural, and economic aspirations? To do so, we must compete with other communities—cities like Charlotte, Cincinnati, Cleveland, Indianapolis, Milwaukee, and St. Louis. Many variables will determine how each community fares in its effort to build an economically powerful creative class. Mr. Florida cites at least three: innovative employers, a lively urban core, and a dynamic ‘arts scene.’ We focused on just one of these critical factors: the assets available to sustain and expand Columbus’ dynamic arts environment.



***What did we measure?***

When a company seeks working capital to build its business, it has a variety of options to consider: debt or equity financing, venture capital, even ‘bootstrapping’ (which any entrepreneur will cite as the most precarious path to navigate successfully).

In order to determine the ‘creative capital’ available to energize a dynamic arts environment in Columbus (in comparison with the six cities mentioned above), we attempted to identify the financial resources that are *consistently* available to nonprofit arts organizations, specifically organizational endowments and foundation assets devoted to arts and culture...because just as creativity is the gold standard for economic growth, endowments and foundations are the gold standard of art institutions’ stability and growth. Without endowment and foundation assets, the arts are relegated to the functional equivalent of ‘bootstrapping,’ and their prospects for sustained success are precarious at best.

Surely Columbus arts organizations have enjoyed critical successes—BalletMet’s acclaimed performances at the Joyce Theatre, the Museum of Art’s notable exhibition *Circle of Bliss*, the reinstatement of the annual Thurber Prize. But can this level of performance be sustained with the equivalent of ‘bootstrap’ funding? Or are these isolated bright spots that will become increasingly rare as our arts organizations refocus their resources on day-to-day survival?

We identified six comparable communities to help benchmark Columbus’ level of creative capital. In each city, we utilized IRS 990 data to identify all arts and cultural organizations with annual operating budgets of \$100,000 or more. And in each city we identified all foundations with a self-proclaimed interest in arts, culture, or the humanities. As a result, we found 265 nonprofit organizations and 348 foundations and began to calculate and analyze the creative capital they contributed to their respective communities.

Table 1: Count of population, arts organizations, and foundations (based on 2003-2004 estimates)

City	Metropolitan Population	Number of nonprofit arts/culture organizations	Number of foundations supporting the arts
St. Louis	2,517,750	39	68
Milwaukee	1,500,741	38	65
Cincinnati	1,553,843	44	64
Cleveland	1,863,479	50	58
Charlotte	1,009,587	29	41
Indianapolis	1,474,128	36	28
<b>Columbus</b>	<b>1,394,666</b>	<b>29</b>	<b>24</b>
Total	11,314,194	265	348
Median	1,500,741	38	58
Average	1,616,302	38	50

For a thorough description of the methods used to collect this data please refer to the endnotes.

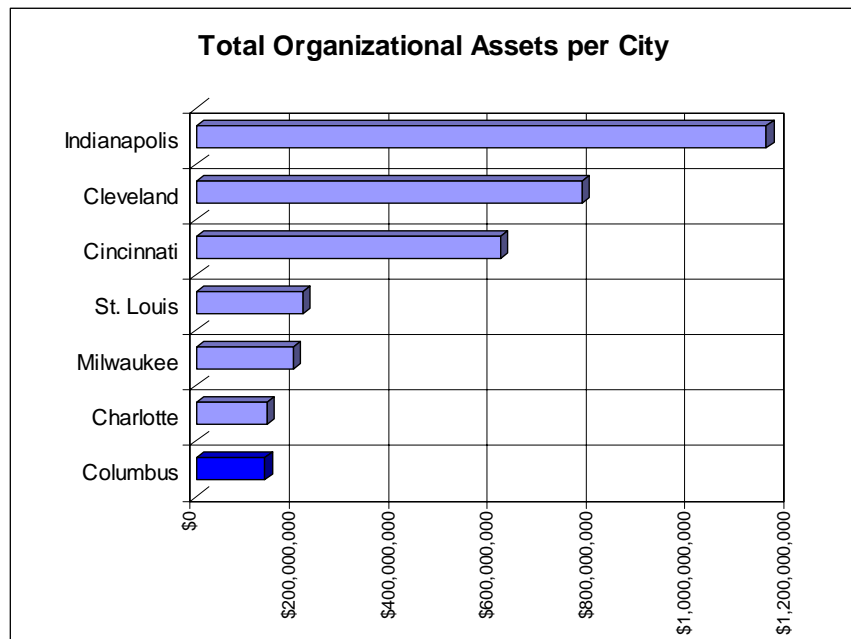


### ***How did Columbus fare?***

**Poorly.** Whether measured in outright dollars, dollars per organization, or dollars per capita, Columbus ranked at or near the bottom of every measure of creative capital. (The complete tables of each city's organizational assets can be found in the appendix.)

Consider, for example, **organizational endowments.** Arts organizations across the country have built sizeable endowments. Most are the result of contributions from visionary individuals—either during their lifetimes or as a result of their estates; people like Enid Smith Goodrich, who died in November 1996 at age 93. Indianapolis' Museum of Art and Children's Museum each received about \$40 million from her estate.

Goodrich was the widow of Pierre Goodrich, who amassed wealth through various investments, including 20 percent ownership of the parent company of the Indianapolis News and the Indianapolis Star. Enid Goodrich had been a longtime donor to the art museum, where she served as a trustee. She was also an honorary trustee of the Children's Museum.



While arts endowments have been built primarily with gifts from individual donors—most often hometown people like Enid and Pierre Goodrich who invested in the community where they lived and prospered—contributions from corporations, foundations, and the arts organizations' retained earnings have also been a factor to a lesser degree in building endowment.

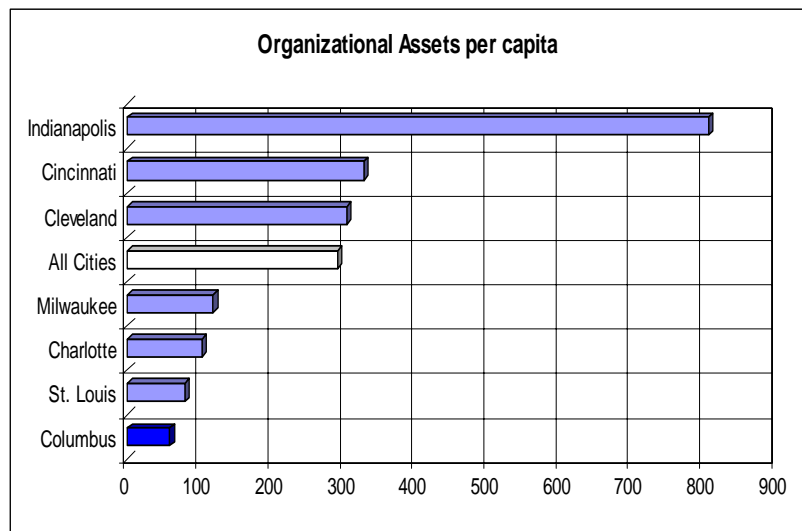
*Just imagine* the stabilizing influence of an endowment of \$40 million, providing revenue of \$2.2 million year after year. Institutions that had previously devoted human and financial resources to financial concerns can now allocate more time and attention to their core missions. Audiences that were once excluded because of high admission or restricted operations can now freely access the treasures of these institutions.

An arts organization with a robust endowment providing reliable revenue has a considerable competitive advantage. Well-endowed arts organizations are far less susceptible to short-term economic cycles and unpredictable events. The revenue earned by an endowment can fund experimental programs, enable



additional performances or exhibitions, provide expanded outreach programs, and otherwise expand the opportunities for a public—especially members of the creative class—with a growing hunger for authentic arts experiences.

Endowments might provide general unrestricted operating support, or might be designated for a particular activity. For example, an art museum with an endowed acquisition fund can seize that moment when the perfect work for its collection is suddenly available. A performing arts troupe might face a fiscal crisis when a snowstorm cancels a pivotal performance—unless they have an operating endowment. In the absence of an endowment, a museum might be forced to increase ticket prices, charge more for special activities, or find other ways to increase their per capita revenue. With a robust endowment, the opposite may occur. Admission to the permanent exhibition at the Cincinnati Art Museum is now free, thanks to a gift of \$2.15 million from Richard and Lois Rosenthal. The couple was inspired by their own childhood experiences at art museums and wanted others in the community to have the same opportunities.



Research conducted by the National Endowment for the Arts found that classical ballet companies (most of which lack endowments) faced economic hardships during the recession of 1990-1991 and needed an average of six years to recover while their artistic production languished.

The economies of managing a museum, a performing arts troupe, or other cultural institution are no different in Columbus than the cost of conducting similar activities in the other comparable cities. Yet the managers of art organizations in Columbus' peer cities have a considerable 'head start' each year, judging by the endowment assets available. Just imagine the transformational impact that an endowment of \$40 million might have when entrusted to the Board of one of our museums or arts organizations. Arts organizations in cities like Cleveland and Cincinnati, with organizational assets of more than \$300 per resident, can be more accessible and more creative. In Columbus, the lack of organizational assets restricts creativity and forces organizations to rely more heavily on ticket sales and annual donations.

***Foundation Support for the Arts***

Endowments are not the only reservoir of creative capital. Across America, visionary philanthropists (and ordinary people) have placed their assets in foundations, including community foundations, to carry out



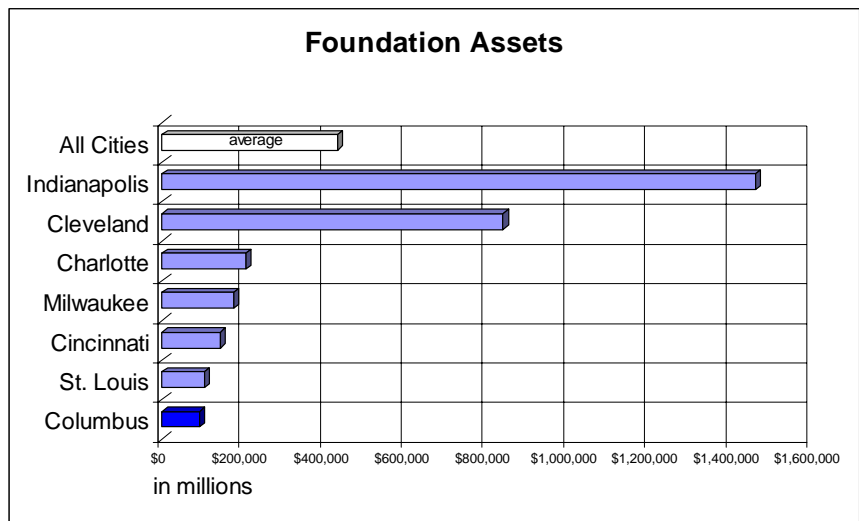
philanthropic aspirations during their lifetimes and beyond. Similarly, corporations have established foundations to facilitate their charitable activities. According to the Foundation Center, private and community foundations now hold assets of \$440 billion—and pay out approximately 5.5% of their value each year in support of worthy causes. On average, foundations devote approximately 12% of their giving to arts and culture, which means that foundations are a repository of nearly \$52 billion in creative capital nationally, yielding nearly \$3 billion in reliable revenue each year.

Table 4: Foundation assets available nationally to support arts and culture

Total foundation assets	Percentage of assets devoted to Arts and Culture	Creative Capital (i.e. foundation assets devoted to arts and culture)	Foundation giving to arts and culture annually
\$440,000,000,000	11.8%	\$51,920,000,000	\$2,855,600,000

Some foundations bear the name of America’s great industrialists, like Ford, Mellon, Lilly, and Packard; but most were created by the kind of people described in the seminal book *The Millionaire Next Door*. These philanthropists earned their money in one or two generations through entrepreneurial ventures. From 1993 to 2003, they fueled a 77% increase in the number of private foundations; today a total of 66,400 foundations support worthy nonprofit endeavors.

However, foundation assets are distributed disproportionately. To be certain, there are large concentrations in New York, Chicago, Los Angeles, and other major metropolitan areas. But there are also surprising pockets of strength in Midwestern cities like Minneapolis, Cleveland, and Indianapolis where great families like Dayton, Gund, and Lilly have had an



enduring impact upon the cultural landscape of their hometowns. These visionary philanthropists dedicated their life’s fortunes to the well-being of their hometowns. And new foundations are being created weekly to provide the same transformational opportunities in places like Charlotte, Cincinnati, and Milwaukee. But not in central Ohio *yet*.

In some cases, benefactors establish foundations or entrust their assets to a community foundation with clear instructions that the proceeds are to support specific organizations each year—the art museum, or the symphony. That’s what Marie Aull did, when she established a \$1 million fund at the Dayton

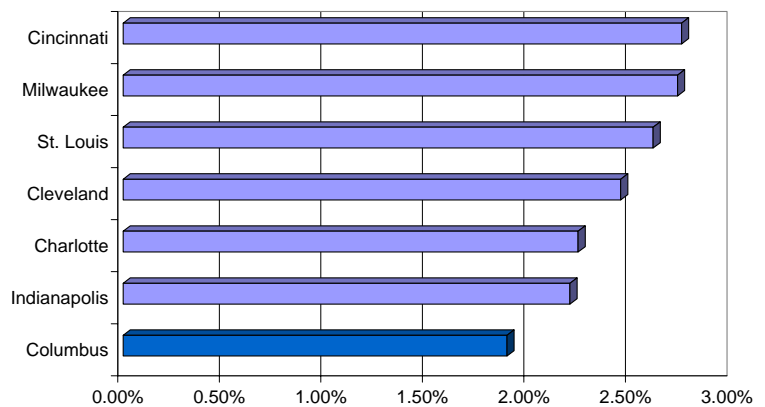


Community Foundation to endow the local Audubon Center. Mrs. Aull and her late husband owned a business that manufactured paper boxes.

In other instances, the donor's intentions are more general, providing a foundation's staff and trustees with the flexibility to reward exceptional performance and/or attend to a struggling organization's needs on a case by case basis. Sarah Belk Gambrell, whose family built the Belk's Department Store chain, devotes nearly one-fourth of her foundation's giving to support a variety of arts organizations in the greater Charlotte area.

Whether a foundation is devoted to a specific arts organization or dedicated to the arts in general is immaterial. The former will sustain a community's time-honored organizations; the latter will reward innovation. The result is an overall increase in the creative capital available to ensure a vibrant arts environment and cultivate a productive creative class.

Households with Assets of \$1 million+ as % of Total Population

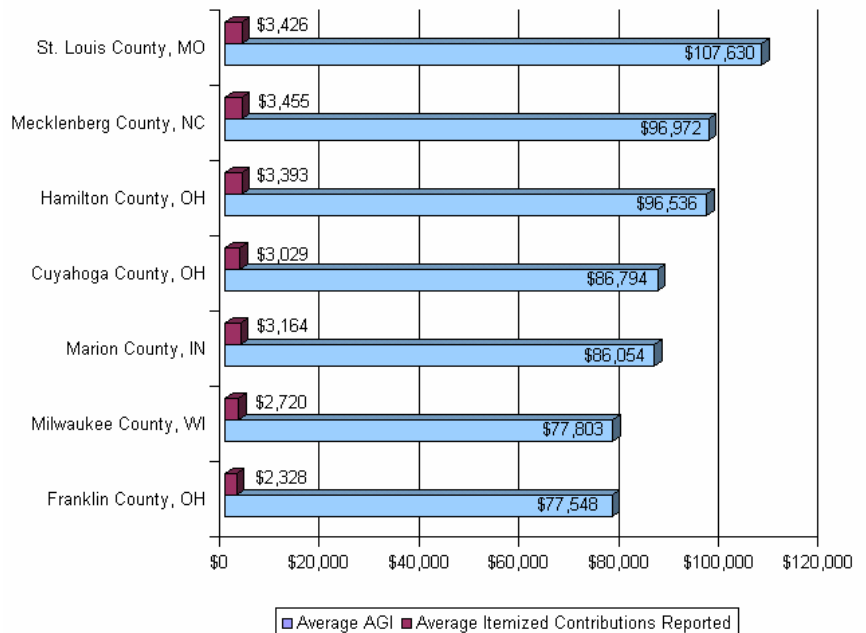


**Conclusion: Does Creative Capital Matter?**

The statistics clearly demonstrate that Columbus lacks the creative capital enjoyed by other cities but what impact might that disadvantage have on wealth and philanthropy? It's too soon to tell but the statistics do show that Columbus is clearly lagging in the creation of personal wealth and the philanthropy it provides. In cities with

robust arts scenes, more than 2% of households enjoy a net worth greater than \$1 million. In Cleveland, that means that there are more than 22,000 affluent households. Once again, Columbus lags the field of comparable cities, with only 12,000 affluent households—just 1.8% of all families.

Across the country, affluent households provided 112 gifts of \$1 million or more for the







arts in 2004, *but none was reported in Columbus*. The discrepancy is reinforced by a comparison of overall charitable giving among the households in each city. Across the country—and in the seven cities included in this study—households that report charitable gifts on their tax returns have a significantly higher adjusted gross income (AGI) than households that do not report charitable gifts. Again, Columbus ranks at the bottom with the lowest average adjusted gross income on itemized returns reporting charitable contributions (\$77,548) and the lowest average itemized contributions reported per household (\$2,328).

Why is Columbus lagging in wealth generation and the philanthropy that it enables? Are we failing to attract a wealth-producing creative class? This data alone cannot support a cause/effect conclusion but the clear correlation between creative capital, affluence and philanthropy bears further investigation. And, it demonstrates that Columbus relies on a relatively small pool of affluent households that have the capacity to turn this tide and increase access to creative capital by expanding arts endowments or establishing foundations that support the arts.

Who will take the lead in building creative capital for Columbus? National trends suggest it will be someone who calls Columbus “home” and whose family founded a successful enterprise here. It will be a person who has been inspired by music, dance, exhibitions, or other artistic expressions, and whose business was able to attract and retain employees because they found that Columbus met their financial, educational, and *creative* needs. Perhaps it will be the legacy of our community’s well known families, or it may be an anonymous “millionaire next door.” Whoever it is, he or she will be a visionary who will calculate the return on his or her investment not only in financial measures, but by the rising tide of creative capital that ensures Columbus residents the quality of life that results from a vibrant creative class enjoying a robust arts scene.



## Endnotes

### **Methodology**

A project such as this is a balancing act. How much data is needed to support meaningful conclusions and when does additional data merely overwhelm interpretation? When is absolute precision a requirement, and what margin of error is acceptable?

In gathering and analyzing information for this study, we attempted to achieve an appropriate balance, given the challenges. At times, we were willing to accept problematic data (as described below) when we felt that the overall impressions were accurate. Just as an impressionist painting can sometimes be more revealing than a sharply focused photograph, we have made every attempt to ensure that the judgment calls we were forced to make led to a fair and balanced comparative analysis.

**Organizational data:** Financial information on the nonprofit organizations in each city was obtained primarily from GuideStar, a national nonprofit organization that provides data from IRS Forms 990, the information tax return required of most nonprofit corporations.

We began by identifying arts and culture organizations within a five-mile radius of each target city using NTEE codes (The National Taxonomy of Exempt Entities assigns a code number to each nonprofit organization, depending on its type of activity.) We defined the search criteria for organizations generally considered “arts” or “culture,” eliminating zoos, nature centers, colleges of art, and other entities that might artificially inflate the statistics. Data came from the most recent IRS 990 available, including total income, total expenses, and assets. Most of the records were for the 2003 tax year, although a few were from 2002 or 2004.

We encountered some variances in the way nonprofit organizations report assets, making it difficult to pinpoint the precise value of endowments. In discussions with nonprofit financial officers, we learned that endowment might be indicated in one (or more) of several fields on the IRS 990, including unrestricted, permanently restricted, or temporarily restricted assets; or even in another part of the form as securities. Furthermore, non-endowment assets such as buildings and collections might be mingled with endowment assets in these same fields. On the other hand, some nonprofits have complex business structures and do not report endowed funds on their organization’s IRS 990; instead, there is a separate entity—usually a supporting foundation—with a completely different NTEE code number. In these cases, the data is reflected with foundations rather than organizations. As a result, we knew the data from the IRS 990 overstated endowment values in some cases and missed endowments entirely for other organizations.

The reporting of total income and expense may also be misleading, although these statistics played only a minor role in our analysis. Institutions that are in the midst of a capital campaign are required to report the entire value of a pledge as income in the year the pledge is received, which artificially inflates the revenue picture for these organizations.

To minimize these discrepancies, we contacted the local arts council in each community and asked them to review the data from their city. This allowed us to identify the most obvious anomalies, such as GuideStar’s omission of the Cleveland Museum of Art’s endowment which we included. We also adjusted the income, expenses, and assets of each city’s arts council, to eliminate double counting of the “pass through” funds reflected in the budgets of the arts organizations they support. In a few cases, we contacted nonprofit organizations directly or consulted their web sites when further clarification was needed. There were also seven arts and culture organizations reported by GuideStar that, because of how they function, were more



appropriately placed in the Foundation listings. These are listed at the bottom of the foundation tables and are separated from the other foundations by a bold line.

**Foundation data:** Obtaining financial data for foundations was somewhat more precise, though not without challenges. Again, we began by consulting a national information resource: the Foundation Center. We used their searchable database to develop a list of all foundations in each city that had a self-identified interest in arts, museums, or culture. This search also yielded each foundation's total assets and total giving. (Note: in the case of Charlotte, we included several foundations located throughout the state, given the unique philanthropic environment in that state.) Occasionally, a foundation's giving exceeded its assets, indicating that the foundation is used as a pass-through; therefore, we counted giving rather than assets in our calculation of creative capital. To this data we added the supporting foundations of nonprofit organizations, as mentioned above.

We then isolated the amount that each foundation devoted to arts and culture by reviewing each foundation's gifts as reported on their foundation web site and/or in their IRS 990. Although this process was labor-intensive, it provided accurate information in most instances. In a few cases, the foundation's reports were so extensive (or so disorganized) that we were unable to separate their gifts to arts and culture, and instead estimated their giving to arts and culture by multiplying their total giving by 11.8%—the average amount that foundations devote to arts and culture nationally.

**Other information:** We also sought a variety of other facts to help illuminate the data from organizations and foundations, as follows:

- Population statistics: "U.S. Census Bureau; Census 2000 Data for the States of Indiana, Missouri, North Carolina, Ohio, Wisconsin: Population, Housing Units, Area, and Density Table: State by County; <http://www.census.gov/census2000/states/>; (accessed: April 2005)."
- Affluence: the list is based on the discretionary spending power of affluent consumers, those in the top 20 percent of U.S. households in terms of wealth and income. Created expressly for marketing to the affluent and developed from the best available data on assets and income by the national marketing data firm Echelon.
- Individual Giving: Data is based on an analysis of actual 1040 tax returns conducted by the National Center on Charitable Statistics in 1997. NCCS is currently updating this data using 2002 tax filings.
- Million dollar donors: The Center on Philanthropy at Indiana University maintains a list of gifts of \$1 million or more, although they caution that "tabulation of million dollar gifts is estimated ... to be one-fourth to one-half of the gifts actually [given]. Gifts to health care, religious organizations, cultural institutions, social service agencies and other organizations are not reported in a systematic way by any one source." Despite these limitations, we procured the "Million Dollar Lists" for the years 2000 through 2004.
- Other donor anecdotes: the stories cited throughout the report came from a variety of sources including personal experience, helpful colleagues, web searches, and research into gifts cited on the "Million Dollar Lists."
- City profiles: we are indebted to the research reports developed by the National Arts Journalism Program of Columbia University and found on their web site [www.najp.org](http://www.najp.org).
- General information: the philanthropic context for this report came from several sources, most notably *Giving USA 2004*, researched and written by The Center on Philanthropy at Indiana University and published by the Giving USA Foundation/AAFRC Trust for Philanthropy.

## Appendix

<b>Compilation of All Cities</b>	page 12.
Snapshot: Summary of Statistics for All Cities	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>Charlotte, North Carolina</b>	page 15.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>Cincinnati, Ohio</b>	page 18.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>Cleveland, Ohio</b>	page 21.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>Columbus, Ohio</b>	page 24.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>Indianapolis, Indiana</b>	page 27.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>Milwaukee, Wisconsin</b>	page 30.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	
<b>St. Louis, Missouri</b>	page 33.
City Profile	
Arts & Culture Organizations	
Foundation Giving to the Arts & Culture	

# Snapshot

## A Summary of Statistics for All Cities

City	Metro Population				Arts & Culture Organizations				Foundations		TOTAL Organization + Foundation	
	People	Households	Affluent Households*	Donors' avg. AGI**	Number of Organizations	Total Expenses	Total Assets	Assets as % of Expenses	Number of Foundations	Assets Devoted to Arts & Culture	Assets	Assets per capita
<b>Charlotte</b>	1,009,587	630,245	14,100	\$96,972	29	\$58,541,979	\$104,614,096	179%	41	\$99,498,828	\$204,112,924	\$202.17
<b>Cincinnati</b>	1,553,843	666,337	18,324	\$96,536	44	\$153,598,480	\$510,340,102	332%	64	\$186,441,521	\$696,781,623	\$448.42
<b>Cleveland</b>	1,863,479	892,596	22,158	\$86,794	50	\$140,905,646	\$568,234,855	403%	58	\$584,026,856	\$1,152,261,711	\$618.34
<b>Columbus</b>	<b>1,394,666</b>	<b>639,764</b>	<b>12,091</b>	<b>\$77,548</b>	<b>29</b>	<b>\$91,685,943</b>	<b>\$81,645,626</b>	<b>89%</b>	<b>24</b>	<b>\$93,968,205</b>	<b>\$175,613,831</b>	<b>\$125.92</b>
<b>Indianapolis</b>	1,474,128	663,158	14,576	\$86,054	36	\$142,574,673	\$1,190,301,968	835%	28	\$1,476,705,869	\$2,667,007,837	\$1,809.21
<b>Milwaukee</b>	1,500,741	601,735	16,445	\$77,803	38	\$70,536,369	\$178,802,889	253%	65	\$178,577,818	\$357,380,707	\$238.14
<b>St. Louis***</b>	2,517,750	1,029,260	26,837	\$107,630	39	\$82,401,225	\$90,304,756	110%	68	\$168,806,782	\$259,111,538	\$102.91
<b>Average</b>	1,616,313	731,871	17,790	\$89,905	38	\$105,749,188	\$389,177,756	368%	50	\$398,289,411	\$787,467,167	\$506.45
<b>Median</b>	1,500,741	663,158	16,445	\$86,794	38	\$91,685,943	\$178,802,889	195%	58	\$178,577,818	\$357,380,707	\$238.14

\* Households with investable financial assets of \$1 million or more as reported by Echelon.

\*\* Adjusted Gross Income among households filing itemized returns including charitable gifts (county).

\*\*\* St. Louis totals do not reflect the Zoo-Museum Taxing District, which provides \$50 million in annual revenue, the equivalent of \$2 billion in endowment or foundation assets. The annual revenue from the taxing district is equivalent to an additional \$340 million in endowment for the Art Museum alone, which would increase organizational assets to 522% of arts & culture total expenses and assets to \$238 per capita.

**Compilation of All Cities**  
**Arts & Culture Organizations**  
**Income, Expenses & Assets**

CITY	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
<b>Charlotte</b>							
# Arts Organizations	29						
Regional Population	1,009,587						
TOTALS	\$64,130,153	\$58,541,979	\$30,461,747	\$34,190,864	\$26,836,115	\$43,587,117	\$104,614,096
PER CAPITA	\$63.52	\$57.99	\$30.17	\$33.87	\$26.58	\$43.17	\$103.62
AVERAGE	\$2,211,385	\$2,018,689	\$1,050,405	\$1,178,995	\$925,383	\$1,503,004	\$3,607,383
MEDIAN	\$490,620	\$461,752	\$0	\$84,267	\$0	\$0	\$185,849
<b>Cincinnati</b>							
# Arts Organizations	44						
Regional Population	1,553,843						
TOTALS	\$161,723,904	\$153,598,480	\$229,256,268	\$254,488,966	\$95,371,171	\$160,479,965	\$510,340,102
PER CAPITA	\$104.08	\$98.85	\$147.54	\$163.78	\$61.38	\$103.28	\$328.44
AVERAGE	\$3,675,543	\$3,490,875	\$5,210,370	\$5,783,840	\$2,167,527	\$3,647,272	\$11,598,639
MEDIAN	\$519,707	\$492,718	\$0	\$45,563	\$59,932	\$0	\$287,432
<b>Cleveland</b>							
# Arts Organizations	50						
Regional Population	1,863,479						
TOTALS	\$145,898,770	\$140,905,646	\$187,524,620	\$353,492,610	\$109,343,741	\$105,398,504	\$568,234,855
PER CAPITA	\$78.29	\$75.61	\$100.63	\$189.69	\$58.68	\$56.56	\$304.93
AVERAGE	\$2,917,975	\$2,818,113	\$3,750,492	\$7,069,852	\$2,186,875	\$2,107,970	\$11,364,697
MEDIAN	\$349,852	\$312,474	\$0	\$36,949	\$25,398	\$0	\$123,352
<b>Columbus</b>							
# Arts Organizations	29						
Regional Population	1,394,666						
TOTALS	\$91,169,951	\$91,685,943	\$7,221,555	\$50,122,787	\$7,929,357	\$23,593,482	\$81,645,626
PER CAPITA	\$65.37	\$65.74	\$5.18	\$35.94	\$5.69	\$16.92	\$58.54
AVERAGE	\$3,143,791	\$3,161,584	\$249,019	\$1,728,372	\$273,426	\$813,568	\$2,815,366
MEDIAN	\$362,347	\$419,783	\$0	\$36,908	\$3,259	\$0	\$102,525
<b>Indianapolis</b>							
# Arts Organizations	36						
Regional Population	1,474,128						
TOTALS	\$128,880,670	\$142,574,673	\$853,023,366	\$940,489,563	\$108,748,156	\$141,064,249	\$1,190,301,968
PER CAPITA	\$87.43	\$96.72	\$578.66	\$638.00	\$73.77	\$95.69	\$807.46
AVERAGE	\$3,580,019	\$3,960,408	\$23,695,094	\$26,124,710	\$3,020,782	\$3,918,451	\$33,063,944
MEDIAN	\$1,059,652	\$1,044,881	\$0	\$472,484	\$66,023	\$1,281	\$979,979
<b>Milwaukee</b>							
# Arts Organizations	38						
Regional Population	1,500,741						
TOTALS	\$66,704,177	\$70,536,369	\$38,746,911	\$27,825,198	\$93,258,114	\$57,719,577	\$178,802,889
PER CAPITA	\$44.45	\$47.00	\$25.82	\$18.54	\$62.14	\$38.46	\$119.14
AVERAGE	\$2,382,292	\$2,519,156	\$1,383,818	\$993,757	\$3,330,647	\$2,061,413	\$6,385,817
MEDIAN	\$474,162	\$417,089	\$0	\$40,472	\$6,612	\$0	\$70,907
<b>St. Louis</b>							
# Arts Organizations	39						
Regional Population	2,517,750						
TOTALS	\$92,266,698	\$82,401,225	\$28,018,933	\$31,212,557	\$26,599,489	\$32,492,710	\$90,304,756
PER CAPITA	\$36.65	\$32.73	\$11.13	\$12.40	\$10.56	\$12.91	\$35.87
AVERAGE	\$2,365,813	\$2,112,852	\$718,434	\$800,322	\$682,038	\$833,146	\$2,315,507
MEDIAN	\$749,807	\$684,994	\$0	\$33,832	\$5,000	\$0	\$122,875
<b>All Cities</b>							
# Arts Organizations	265						
Total Population	11,314,194						
TOTALS	\$750,774,323	\$740,244,315	\$1,374,253,400	\$1,691,822,545	\$468,086,143	\$564,335,604	\$389,177,756
PER CAPITA	\$66.36	\$65.43	\$121.46	\$149.53	\$41.37	\$49.88	\$34.40
AVERAGE/INSTITUTION	\$107,253,475	\$105,749,188	\$196,321,914	\$241,688,935	\$66,869,449	\$80,619,372	\$1,263,564
MEDIAN	\$92,266,698	\$91,685,943	\$38,746,911	\$50,122,787	\$93,258,114	\$57,719,577	\$267,560

*Compilation of All Cities*  
**Foundation Giving to the Arts & Culture**

	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
<b>Charlotte</b>					
# Foundations Giving to ACH	41				
Regional Population	1,009,587				
TOTALS	\$1,396,486,518	\$204,239,156	\$30,172,723	14.77%	\$99,498,828
PER CAPITA	\$1,383.23	\$202.30	\$29.89	N/A	\$98.55
AVERAGE	\$34,060,647	\$4,981,443	\$735,920	N/A	\$2,426,801
MEDIAN	\$3,652,962	\$318,417	\$40,000	12.56%	\$492,376
<b>Cincinnati</b>					
# Foundations Giving to ACH	64				
Regional Population	1,553,843				
TOTALS	\$811,980,831	\$72,664,804	\$12,762,155	17.56%	\$186,441,521
PER CAPITA	\$522.56	\$46.76	\$8.21	N/A	\$119.99
AVERAGE	\$12,687,200	\$1,135,388	\$199,409	N/A	\$2,913,149
MEDIAN	\$4,757,611	\$330,463	\$51,500	15.58%	\$904,512
<b>Cleveland</b>					
# Foundations Giving to ACH	58				
Regional Population	1,863,479				
TOTALS	\$2,982,410,263	\$200,201,504	\$56,431,236	28.19%	\$584,026,856
PER CAPITA	\$1,600.45	\$107.43	\$30.28	N/A	\$313.41
AVERAGE	\$51,420,867	\$3,451,750	\$972,952	N/A	\$10,069,429
MEDIAN	\$5,414,564	\$515,695	\$65,975	12.79%	\$699,045
<b>Columbus</b>					
# Foundations Giving to ACH	24				
Regional Population	1,394,666				
TOTALS	\$829,144,075	\$77,033,294	\$8,497,938	11.03%	\$93,968,205
PER CAPITA	\$594.51	\$55.23	\$6.09	N/A	\$67.38
AVERAGE	\$34,547,670	\$3,209,721	\$354,081	N/A	\$3,915,342
MEDIAN	\$3,085,284	\$322,936	\$26,500	8.21%	\$183,023
<b>Indianapolis</b>					
# Foundations Giving to ACH	28				
Regional Population	1,474,128				
TOTALS	\$12,003,630,731	\$523,846,565	\$63,810,303	12.18%	\$1,476,705,869
PER CAPITA	\$8,142.87	\$355.36	\$43.29	N/A	\$1,001.75
AVERAGE	\$428,701,098	\$18,708,806	\$2,278,939	N/A	\$52,739,495
MEDIAN	\$6,275,909	\$332,698	\$43,690	13.13%	\$696,542
<b>Milwaukee</b>					
# Foundations Giving to ACH	65				
Regional Population	1,500,741				
TOTALS	\$868,692,214	\$81,070,188	\$16,431,858	20.27%	\$178,577,818
PER CAPITA	\$578.84	\$54.02	\$10.95	N/A	\$118.99
AVERAGE	\$13,364,496	\$1,247,234	\$252,798	N/A	\$2,747,351
MEDIAN	\$3,843,000	\$330,437	\$61,000	18.46%	\$552,071
<b>St. Louis</b>					
# Foundations Giving to ACH	68				
Regional Population	2,517,750				
TOTALS	\$698,825,893	\$112,636,114	\$16,605,785	14.74%	\$168,806,782
PER CAPITA	\$277.56	\$44.74	\$6.60	N/A	\$67.05
AVERAGE	\$10,276,851	\$1,656,413	\$244,203	N/A	\$2,482,453
MEDIAN	\$5,592,319	\$375,949	\$46,400	12.34%	\$576,037
<b>All Cities</b>					
# Foundations Giving to ACH	348				
Total Population	11,314,194				
TOTALS	\$19,591,170,525	\$1,271,691,625	\$204,711,997	16.10%	\$398,289,411
PER CAPITA	\$1,731.56	\$112.40	\$18.09	N/A	\$35.20
AVERAGE/FNDTN	\$2,798,738,646	\$181,670,232	\$29,244,571	N/A	\$1,178,371
MEDIAN	\$868,692,214	\$112,636,114	\$16,605,785	14.74%	\$586,229

# Charlotte, North Carolina



## City Profile

page 15.

### ***At a glance:***

With Charlotte's meteoric growth as a trade and banking center, the city's cultural engines revved into high gear starting in the 1970s, with almost all the activity focused on North Tryon Street. The central force behind this explosion has been the Charlotte-Mecklenburg Arts & Science Council, a powerful non-profit agency founded in 1958 that operates on an annual budget of about \$11 million and also receives millions of dollars from the city, county, and state. A study commissioned by the Charlotte-Mecklenburg Arts & Science Council recently revealed that the arts add \$55 million a year to the local economy.

Funding from the Arts & Science Council has helped to offset the city's anemic permanent assets, which ranked well below the average and median in all categories—organizational assets, assets as a percentage of organizational expenses, and foundation assets devoted to arts and culture. The impact of this low asset base was further diminished by the relatively small number of major arts organizations among which these assets are distributed.

### ***Statistical Summary:***

Charlotte Residents	
Population / Households	1,009,587 / 630,245
Percentage of households that are affluent	2.24%
Number of affluent households	14,100
AGI of households reporting charitable contributions	\$96,972
Average contributions of h'holds reporting charitable contributions	\$3,455

Charlotte Nonprofit Arts and Cultural Organizations	
Number of Organizations included	29
Total Expenses	\$58,541,979
Average Expenses	\$2,018,689
Total Assets	\$104,614,096
Average Assets	\$3,607,383

Charlotte Foundations	
Number of Foundations included	41
Total Assets	\$1,396,486,518
Total Giving	\$204,239,156
Giving to Arts & Culture	\$30,172,723
Percentage of Giving to Arts & Culture	14.77%
Assets Devoted to Arts & Culture	\$99,498,828



Charlotte, North Carolina  
Arts & Culture Organizations  
Income, Expenses & Assets

ORGANIZATION	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
Actor's Theatre of Charlotte	\$189,725	\$181,717	\$0	\$0	\$0	\$0	\$0
Afro-American Cultural Center	\$676,015	\$665,832	\$0	\$477,855	\$0	\$51,152	\$529,007
Boys & Girls Choir at St. Peters, Inc.	\$135,270	\$148,611	\$0	\$40,755	\$0	\$0	\$40,755
Carolina Voices, Inc.	\$228,734	\$261,691	\$14,238	\$0	\$0	\$0	\$0
Carolinas Concert Association	\$611,224	\$577,795	\$0	\$574,354	\$165,783	\$0	\$740,137
Charlotte Artsfest, Inc.	\$539,618	\$505,598	\$0	-\$277,411	\$0	\$0	-\$277,411
Charlotte Childrens Choir	\$474,285	\$461,752	\$0	\$0	\$0	\$0	\$0
Charlotte Philharmonic Society	\$542,848	\$612,218	\$0	-\$118,464	\$0	\$0	-\$118,464
Charlotte Repertory Theatre	\$2,497,970	\$2,245,622	\$0	-\$294,716	\$452,434	\$411,036	\$568,754
Charlotte Symphony Orchestra, Inc.	\$8,429,919	\$7,324,503	\$2,270,975	-\$64,432	\$221,804	\$5,032,359	\$5,189,731
Charlotte Trolley, Inc.	\$129,151	\$123,030	\$0	\$433,227	\$52,518	\$0	\$485,745
Charlotte Youth Ballet, Inc.	\$117,975	\$114,689	\$0	\$24,152	\$0	\$0	\$24,152
Childrens Theatre of Charlotte, Inc.	\$2,497,655	\$1,902,095	\$7,779,343	\$128,294	\$322,102	\$11,056,817	\$11,507,213
Discovery Place, Inc.	\$8,630,281	\$9,337,519	\$0	\$4,526,634	\$13,582,642	\$1,449,236	\$19,558,512
Festival in the Park, Inc.	\$159,913	\$175,042	\$77,912	\$84,267	\$0	\$0	\$84,267
Founders Circle, Ltd.	\$170,462	\$269,057	\$0	\$120,784	\$0	\$0	\$120,784
Levine Museum of the New South	\$1,758,221	\$1,693,279	\$0	\$7,639,273	\$318,464	\$0	\$7,957,737
Light Factory	\$357,691	\$350,269	\$0	\$174,142	\$0	\$11,707	\$185,849
Little Theatre of Charlotte, Inc.	\$490,620	\$449,434	\$0	\$153,579	\$58,964	\$2,231	\$214,774
Matthews Playhouse Of Performing Arts Inc	\$198,884	\$200,774	\$0	\$0	\$0	\$0	\$0
McCull Center for Visual Art	\$1,035,501	\$1,436,457	\$0	\$7,960,514	\$0	\$6,453,973	\$14,414,487
McGill Rose Garden	\$101,516	\$129,990	\$0	\$0	\$0	\$0	\$0
Mint Museum Of Art, Inc.	\$7,938,446	\$5,107,210	\$11,017,941	\$11,617,971	\$2,891,465	\$10,787,180	\$25,296,616
Moving Poets, Inc.	\$201,984	\$192,406	\$0	\$0	\$0	\$0	\$0
North Carolina Dance Theatre	\$6,081,916	\$4,001,959	\$0	-\$338,852	\$2,547,283	\$1,234,656	\$3,443,087
North Carolina Performing Arts Center At Charlotte Foundation	\$16,826,320	\$16,809,713	\$8,352,906	\$1,090,852	\$6,166,644	\$6,354,047	\$13,611,543
Opera Carolina	\$2,590,979	\$2,653,144	\$948,432	\$133,974	\$0	\$742,723	\$876,697
St. Marks Foundation	\$261,357	\$358,085	\$0	\$0	\$0	\$0	\$0
The Symphony Guild of Charlotte, Inc.	\$255,673	\$252,488	\$0	\$104,112	\$56,012	\$0	\$160,124
TOTALS	\$64,130,153	\$58,541,979	\$30,461,747	\$34,190,864	\$26,836,115	\$43,587,117	\$104,614,096
AVERAGE	\$2,211,385	\$2,018,689	\$1,050,405	\$1,178,995	\$925,383	\$1,503,004	\$3,607,383
MEDIAN	\$490,620	\$461,752	\$0	\$84,267	\$0	\$0	\$185,849

Charlotte, North Carolina  
Foundation Giving to the Arts & Culture

FOUNDATION NAME	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
ABC Foundation	\$3,688,396	\$274,342	\$11,000	4.01%	\$147,890
Bank of America Foundation, Inc.*	\$2,255,903	\$76,513,808	\$9,028,629	11.80%	\$9,028,629
Belk Educational Foundation, Irwin	\$563,179	\$398,250	\$17,150	4.31%	\$24,252
Belk Foundation, Inc., Katherine and Thomas, The	\$3,200,442	\$146,250	\$22,500	15.38%	\$492,376
Belk Foundation, The	\$47,929,032	\$2,592,461	\$120,000	4.63%	\$2,218,542
Bernstein Family Foundation, Donald H. & Barbara K., The	\$828,713	\$165,393	\$24,550	14.84%	\$123,009
Blumenthal Foundation, The	\$18,598,973	\$1,733,218	\$168,000	9.69%	\$1,802,790
Dalton Foundation, Inc., Harry L.	\$5,542,432	\$318,417	\$20,500	6.44%	\$356,827
Deal Foundation, The	\$2,782,742	\$227,000	\$8,500	3.74%	\$104,200
Dowd Foundation, Inc.	\$13,615,392	\$811,151	\$54,667	6.74%	\$917,601
Duke Energy Foundation	\$42,875,062	\$10,046,968	\$1,208,514	12.03%	\$5,157,289
Ferebee Endowment, Percy B.	\$3,523,526	\$146,500	\$0	0.00%	\$0
Finch Foundation, Doak, The	\$3,888,240	\$236,000	\$1,500	0.64%	\$24,713
Fonville Foundation, Charles L. & Doris M.	\$783,199	\$120,500	\$5,000	4.15%	\$32,498
Foundation for the Carolinas	\$478,334,049	\$19,813,125	\$468,248	2.36%	\$11,304,575
Gambrell Family Foundation	\$54,930	\$240,000	\$69,000	28.75%	\$69,000 **
Gambrell Foundation, Sarah Belk	\$2,706,955	\$162,000	\$41,000	25.31%	\$685,094
Ginter Foundation, Karl and Anna	\$2,333,441	\$209,300	\$0	0.00%	\$0
Gorelick Family Foundation, Shelton	\$4,096,332	\$139,725	\$72,100	51.60%	\$2,113,763
Gorelick Family Foundation, William and Patricia	\$3,652,962	\$313,322	\$22,350	7.13%	\$260,574
Halton Foundation, Inc., D. F.	\$24,592	\$415,225	\$16,000	3.85%	\$16,000 **
Harris Foundation, James J. and Angelia M.	\$15,284,589	\$1,209,000	\$100,000	8.27%	\$1,264,234
Haun Residuary Trust, Paul	\$2,867,438	\$132,262	\$132,262	100.00%	\$2,867,438
Hayworth Foundation, Charles E. & Pauline, The	\$2,912,541	\$161,000	\$5,000	3.11%	\$90,452
Levine Foundation, Leon, The	\$159,613,804	\$7,674,950	\$342,800	4.47%	\$7,129,116
Love Foundation, Martha and Spencer	\$2,319,332	\$110,000	\$40,000	36.36%	\$843,393
McColl Foundation	\$3,313,266	\$137,000	\$12,000	8.76%	\$290,213
O'Herron Foundation, Inc.	\$8,267,720	\$432,175	\$22,300	5.16%	\$426,610
Price Family Foundation, Julian, The*	\$11,358,735	\$1,126,970	\$132,982	11.80%	\$1,340,331
Provident Benevolent Foundation*	\$14,913,814	\$851,000	\$100,418	11.80%	\$1,759,830
Ragland, Jr. Trust, Trent	\$3,310,745	\$182,875	\$8,260	4.52%	\$149,538
Rankin Foundation, Inc., O'H.	\$3,064,338	\$179,800	\$3,000	1.67%	\$51,129
Ray Foundation, Inc., Dee and Rick, The	\$153,847	\$150,463	\$0	0.00%	\$0
Richmond Community Foundation, Inc.	\$28,729,598	\$1,336,245	\$12,500	0.94%	\$268,753
Shelton Foundation, The	\$1,118,380	\$373,833	\$293,826	78.60%	\$879,027
Silverman Family Foundation, Marc and Mattye, The	\$1,999,188	\$107,093	\$6,560	6.13%	\$122,461
Spangler Foundation, Inc., C. D.	\$248,929,677	\$13,467,120	\$283,000	2.10%	\$5,231,044
Van Every Foundation, Philip L.	\$16,950,670	\$825,300	\$52,500	6.36%	\$1,078,287
Wachovia Foundation, Inc.	\$31,707,717	\$31,707,717	\$3,741,511	11.80%	\$3,741,511
Winston-Salem Foundation	\$173,762,053	\$15,493,106	\$1,335,576	8.62%	\$14,979,077
Arts & Science Council of Charlotte/Mecklenburg, Inc.	\$24,630,574	\$13,558,292	\$12,169,020	89.75%	\$22,106,763
TOTALS	\$1,396,486,518	\$204,239,156	\$30,172,723	14.77%	\$99,498,828
AVERAGE	\$34,060,647	\$4,981,443	\$735,920	14.77%	\$2,426,801
MEDIAN	\$3,652,962	\$318,417	\$40,000	12.56%	\$492,376

\*Giving to the arts calculated at 11.8% of Total Assets

\*\*ACH Assets calculated as Giving x % of Giving

# Cincinnati, Ohio



## City Profile

page 18.

### ***At a glance:***

Cincinnati has the highest percentage of high-net-worth households (2.75%) and the second highest number of foundations supporting the arts (64) among the cities studied.

Cincinnati is also home to the nation's oldest and largest united arts fund, which began raising funds for the arts in 1949. The fund, which distributes more than \$10 million to Cincinnati-area arts organizations each year, is financed by an annual workplace-giving campaign, as well as gifts from corporations, individuals, foundations, and the arts fund's budding endowment.

According to [cincinnatiarts.com](http://cincinnatiarts.com), "Cincinnati has a very rich arts community. Many other cities may claim to be arts meccas, but no other metropolitan area within Ohio has as many arts organizations as the Cincinnati region."

### ***Statistical Summary:***

Cincinnati Residents	
Population / Households	1,553,843 / 666,337
Percentage of households that are affluent	2.75%
Number of affluent households	18,324
AGI of households reporting charitable contributions	\$96,536
Average contributions of h'holds reporting charitable contributions	\$3,393

Cincinnati Nonprofit Arts and Cultural Organizations	
Number of Organizations included	44
Total Expenses	\$153,598,480
Average Expenses	\$3,490,875
Total Assets	\$510,340,102
Average Assets	\$11,598,639

Cincinnati Foundations	
Number of Foundations included	64
Total Assets	\$811,980,831
Total Giving	\$72,664,804
Giving to Arts & Culture	\$12,762,155
Percentage of Giving to Arts & Culture	17.56%
Assets Devoted to Arts & Culture	\$186,441,521

**Cincinnati, Ohio**  
**Arts & Culture Organizations**  
**Income, Expenses & Assets**

ORGANIZATION	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
American Classical Music Hall Of Fame And Museum	\$295,994	\$227,088	\$0	\$177,625	\$187,036	\$0	\$364,661
Artreach Theatre IV	\$787,167	\$864,507	\$0	-\$81,936	\$0	\$0	-\$81,936
Arts Consortium Of Cincinnati	\$322,606	\$390,089	\$294,499	\$77,725	\$294,499	\$0	\$372,224
Childrens Theatre	\$731,852	\$939,516	\$2,248,066	\$0	\$0	\$0	\$0
Cincinnati Arts Association	\$9,821,015	\$11,155,802	\$0	\$14,356,563	\$7,732,687	\$7,724,626	\$29,813,876
Cincinnati Arts School, Inc.	\$401,467	\$643,041	\$0	-\$327,572	\$368,776	\$0	\$41,204
Cincinnati Association For The Performing Arts	\$9,821,015	\$11,155,802	\$0	\$14,356,563	\$7,732,687	\$7,724,626	\$29,813,876
Cincinnati Ballet Company, Inc.	\$4,367,012	\$5,864,741	\$1,035,000	\$1,997,670	\$3,613,672	\$0	\$5,611,342
Cincinnati Black Theatre Company	\$145,055	\$119,907	\$0	\$20,861	\$0	\$0	\$20,861
Cincinnati Boychoir, Inc.	\$175,410	\$170,046	\$0	\$206,750	\$900	\$0	\$207,650
Cincinnati Chamber Orchestra, Inc.	\$398,936	\$398,531	\$0	\$30,746	\$0	\$0	\$30,746
Cincinnati Museum Center For Natural And Cultural History	\$11,190,432	\$13,784,593	\$7,507,216	\$23,528,185	\$3,703,978	\$6,656,049	\$33,888,212
Cincinnati Museum of Art	\$12,873,967	\$14,078,293	\$41,552,519	\$30,487,667	\$12,984,761	\$60,103,297	\$103,575,725
Cincinnati Musical Festival Association	\$831,781	\$1,675,758	\$5,047,800	\$2,608,396	\$566,888	\$2,837,394	\$6,012,678
Cincinnati Observatory Center	\$185,847	\$181,304	\$3,284	\$803,920	\$19,872	\$0	\$823,792
Cincinnati Opera Association	\$9,275,991	\$5,992,894	\$0	\$7,237,012	\$5,130,488	\$6,734,971	\$19,102,471
Cincinnati Playhouse in the Park	\$8,793,863	\$9,444,434	\$0	\$9,577,135	\$1,778,928	\$916,215	\$12,272,278
Cincinnati Shakespeare Festival	\$262,125	\$268,909	\$0	\$0	\$0	\$0	\$0
Cincinnati Symphony Orchestra	\$32,945,371	\$35,365,234	\$61,263,156	\$25,292,666	\$6,729,862	\$49,058,444	\$81,080,972
Cincinnati Symphony Orchestra Endowment Fund	\$212,656	\$431,028	\$2,640,768	\$0	\$0	\$2,655,721	\$2,655,721
Cincinnati Young Peoples Theatre	\$668,956	\$668,675	\$0	\$0	\$0	\$0	\$0
Contemporary Arts Center	\$11,237,421	\$3,443,820	\$16,230,174	\$11,720,383	\$18,484,036	\$2,848,790	\$33,053,209
Contemporary Dance Theater, Inc.	\$258,356	\$237,259	\$0	\$0	\$0	\$0	\$0
Downtown Theatre Classics	\$340,584	\$350,619	\$0	\$0	\$0	\$0	\$0
Enjoy the Arts	\$322,218	\$313,750	\$0	\$0	\$0	\$0	\$0
Ensemble Theatre Of Cincinnati	\$1,773,619	\$1,492,866	\$0	\$38,040	\$386,565	\$0	\$424,605
Fitton Center for Creative Arts	\$3,095,258	\$1,458,752	\$712,131	\$53,085	\$1,952,453	\$0	\$2,005,538
Friends Of The School For Creative And Performing Arts	\$616,703	\$554,407	\$438,174	\$29,991	\$22,978	\$547,624	\$600,593
Greater Cincinnati Arts & Education Center	\$422,711	\$85,042	\$0	-\$352,274	\$793,101	\$0	\$440,827
Greater Cincinnati Blues Society, Inc.	\$194,808	\$192,659	\$0	\$0	\$0	\$0	\$0
Greater Cincinnati Television Educational Foundation	\$6,971,879	\$7,638,831	\$0	\$9,026,050	\$4,177,864	\$818,757	\$14,022,671
Institute of Fine Arts/Taft Museum of Art	\$12,888,652	\$14,199,043	\$86,633,245	\$62,873,524	\$2,689,582	\$9,928,856	\$75,491,962
Linton Incorporated	\$212,102	\$232,843	\$0	\$0	\$0	\$0	\$0
Madcap Productions	\$953,782	\$947,553	\$0	\$86,094	\$53,350	\$0	\$139,444
Mariemont Players, Inc.	\$112,560	\$80,062	\$0	\$0	\$0	\$0	\$0
Muse Cincinnati Womens Choir	\$101,792	\$75,133	\$282	\$0	\$0	\$0	\$0
National Underground Railroad Freedom Center	\$14,523,958	\$5,673,671	\$3,578,099	\$39,870,025	\$15,601,780	\$1,924,595	\$57,396,400
Northern Kentucky Symphony, Inc.	\$349,192	\$317,841	\$1,630	\$120,262	\$89,940	\$0	\$210,202
Shadow Newport, Inc.	\$1,245,485	\$1,272,687	\$0	\$0	\$0	\$0	\$0
Starling Project Foundation, Inc.	\$218,397	\$209,568	\$0	\$19,967	\$0	\$0	\$19,967
Summerfair, Inc.	\$155,109	\$134,764	\$0	\$166,166	\$0	\$0	\$166,166
The Carnegie Visual & Performing Arts Center, Inc.	\$696,428	\$341,646	\$0	\$489,642	\$207,975	\$0	\$697,617
The World Piano Competition, Inc.	\$210,929	\$207,923	\$70,225	-\$1,965	\$66,513	\$0	\$64,548
Three Square Music Foundation	\$313,443	\$317,549	\$0	\$0	\$0	\$0	\$0
TOTALS	\$161,723,904	\$153,598,480	\$229,256,268	\$254,488,966	\$95,371,171	\$160,479,965	\$510,340,102
AVERAGE	\$3,675,543	\$3,490,875	\$5,210,370	\$5,783,840	\$2,167,527	\$3,647,272	\$11,598,639
MEDIAN	\$519,707	\$492,718	\$0	\$45,563	\$59,932	\$0	\$287,432

Cincinnati, Ohio  
Foundation Giving to the Arts & Culture

FOUNDATION NAME	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
Allen H. & Selma W. Berkman Charitable Trust	\$4,385,864	\$246,000	\$1,000	0.41%	\$17,829
August A. Rendigs, Jr. Foundation	\$4,632,793	\$136,178	\$27,678	20.32%	\$941,609
Brian H. & Jill R. Rowe Family Foundation, The	\$1,088,621	\$357,750	\$11,500	3.21%	\$34,994
Carol & Ralph Haile, Jr. Foundation	\$544,639	\$540,000	\$2,500	0.46%	\$2,521
Castellini Foundation	\$8,466,691	\$1,462,969	\$186,400	12.74%	\$1,078,759
Charles H. Dater Foundation	\$41,384,146	\$1,724,665	\$615,000	35.66%	\$14,757,214
Charles Moerlein Foundation	\$1,993,277	\$102,000	\$87,000	85.29%	\$1,700,148
Chemed Foundation	\$4,078,013	\$259,407	\$17,847	6.88%	\$280,564
Cinergy Foundation, The	\$73,787	\$3,457,018	\$408,500	11.82%	\$408,500 **
Clement and Ann Buenger Foundation	\$21,901,811	\$121,600	\$62,500	51.40%	\$11,257,099
Corbett Foundation, The	\$15,935,626	\$849,152	\$765,500	90.15%	\$14,365,769
Dudley Taft Charitable Foundation	\$1,995,002	\$150,000	\$115,000	76.67%	\$1,529,502
Edward L. Hutton Foundation	\$4,927,138	\$221,113	\$3,000	1.36%	\$66,850
Eleanora C. U. Alms Trust	\$3,584,927	\$567,000	\$552,000	97.35%	\$3,490,088
F. & J. Kloenne Foundation, The	\$3,739,925	\$117,500	\$10,000	8.51%	\$318,291
Farmer Family Foundation	\$75,695,721	\$2,684,857	\$524,250	19.53%	\$14,780,482
Fifth Third Foundation, The	\$20,700,163	\$9,518,320	\$179,700	1.89%	\$390,806
Fleischmann Foundation, The	\$2,760,960	\$136,211	\$67,163	49.31%	\$1,361,376
Four Winds Foundation	\$2,132,722	\$161,100	\$2,500	1.55%	\$33,096
Frances R. Luther Charitable Trust, The	\$44,463,542	\$1,739,500	\$783,000	45.01%	\$20,014,345
Friedlander Family Fund	\$3,215,392	\$131,720	\$26,560	20.16%	\$648,351
Gaynor Family Foundation, The	\$917,323	\$102,847	\$18,342	17.83%	\$163,598
Gradison Foundation, The	\$1,950,892	\$98,450	\$4,525	4.60%	\$89,668
Greater Cincinnati Foundation, The*	\$201,623,987	\$29,981,000	\$3,537,758	11.80%	\$23,791,630
Hartzell-Norris Charitable Trust	\$5,409,967	\$279,853	\$600	0.21%	\$11,599
Hayfields Foundation	\$5,905,951	\$290,000	\$46,000	15.86%	\$936,806
Heimann Family Foundation, The	\$5,832,903	\$264,415	\$14,255	5.39%	\$314,460
Helen G., Henry F. & Louise T. Dornette Foundation	\$13,943,687	\$126,070	\$0	0.00%	\$0
Howe Family Foundation	\$1,969,958	\$98,400	\$50,000	50.81%	\$1,000,995
John and Shirley Davis Foundation	\$927,546	\$843,509	\$29,925	3.55%	\$32,906
Josephine Schell Russell Charitable Trust, The	\$11,437,873	\$320,925	\$60,000	18.70%	\$2,138,420
L and L Nippert Charitable Foundation, Inc.	\$11,894,940	\$576,105	\$40,000	6.94%	\$825,887
Ladislav & Vilma Segoe Family Foundation	\$3,591,998	\$138,580	\$44,000	31.75%	\$1,140,481
LKC Foundation	\$9,298,271	\$579,359	\$35,475	6.12%	\$569,347
Lois and Richard Rosenthal Foundation	\$6,054,407	\$363,855	\$291,800	80.20%	\$4,855,440
Louise Taft Semple Foundation, The	\$20,810,996	\$942,358	\$550,000	58.36%	\$12,146,178
Manuel D. & Rhoda Mayerson Foundation	\$29,847,518	\$378,144	\$38,234	10.11%	\$3,017,872
Marge & Charles J. Schott Foundation	\$44,028,951	\$493,505	\$13,125	2.66%	\$1,170,971
Milacron Foundation	\$54,808	\$494,000	\$110,500	22.37%	\$12,260
MLFB Foundation	\$384,371	\$118,241	\$5,030	4.25%	\$16,351
Ohio Valley Foundation, The	\$6,477,183	\$577,833	\$127,000	21.98%	\$1,423,599
Philip G. Steiner Family Foundation	\$2,484,927	\$114,100	\$25,000	21.91%	\$544,463
Rieveschl Foundation, The	\$4,882,429	\$931,896	\$181,825	19.51%	\$952,625
Robert C. & Adele R. Schiff Foundation	\$37,287,665	\$1,804,500	\$451,000	24.99%	\$9,319,333
Robert T. Keeler Foundation	\$7,764,887	\$364,100	\$0	0.00%	\$0
Skyler Foundation	\$4,394,446	\$229,000	\$56,500	24.67%	\$1,084,219
Taft/Mahler Family Foundation	\$461,899	\$375,098	\$333,415	88.89%	\$410,570
The Convergys Foundation, Inc.	\$480,436	\$862,853	\$216,450	25.09%	\$120,519
The Kaplan Foundation	\$3,979,552	\$615,959	\$451,884	73.36%	\$2,919,506
The Ohio National Foundation	\$1,249,583	\$585,509	\$98,927	16.90%	\$211,128
The Oliver Family Foundation	\$10,091,898	\$286,000	\$37,500	13.11%	\$1,323,238
The Wohlgenuth-Herschede Foundation	\$8,875,623	\$417,000	\$131,000	31.41%	\$2,788,265
Thendara Foundation, Inc., The	\$7,991,182	\$340,000	\$53,000	15.59%	\$1,245,684
Thomas J. Emery Memorial, The	\$25,039,665	\$1,391,000	\$404,000	29.04%	\$7,272,484
Vista Foundation	\$1,590,019	\$104,945	\$14,100	13.44%	\$213,629
Walter L. Gross, Jr. Family Foundation	\$2,905,006	\$130,200	\$4,000	3.07%	\$89,247
William H. Albers Foundation, Inc., The	\$2,555,244	\$161,600	\$18,200	11.26%	\$287,781
William O. and Margaret H. DeWitt Foundation	\$978,966	\$97,600	\$10,000	10.25%	\$100,304
William O. Purdy, Jr. Foundation, The	\$2,404,475	\$111,600	\$92,600	82.97%	\$1,995,111
William P. Anderson Foundation	\$5,791,863	\$299,500	\$32,500	10.85%	\$628,499
Williams Foundation, The	\$6,681,050	\$480,578	\$62,740	13.06%	\$872,219
Wodecroft Foundation	\$16,212,852	\$906,000	\$422,000	46.58%	\$7,551,682
Zaring Family Foundation	\$2,643,862	\$112,660	\$8,750	7.77%	\$205,342
Nina Browne Parker Trust	\$5,169,012	\$191,597	\$191,597	100.00%	\$5,169,012
TOTALS	\$811,980,831	\$72,664,804	\$12,762,155	17.56%	\$186,441,521
AVERAGE	\$12,687,200	\$1,135,388	\$199,409	17.56%	\$2,913,149
MEDIAN	\$4,757,611	\$330,463	\$51,500	15.58%	\$904,512

\*Giving to the arts calculated at 11.8% of Total Giving

\*\*ACH Assets calculated as Giving x % of Giving



### ***At a glance:***

Cleveland's arts and cultural community rivals that of other major cities across the country. The Cleveland Museum of Art, Severance Hall, and the Symphony—all are considered among the gems in their respective fields. Cleveland enjoys artistic quality *and* quantity—the community has the highest number of arts and cultural organizations in this study and ranks second in terms of foundation assets devoted to arts and culture. Cleveland's foundations direct an extraordinary proportion of their giving—28.2% to arts and culture.

Yet a report by the Civic Study Commission on the Performing Arts, funded by the Cleveland Foundation, declares that the city's cultural life is in danger unless the community finds new ways to sustain the arts over the long term. A Community Partnership for Arts and Culture, (The Partnership) was launched to work with the region's people to create an arts and culture blueprint for success. The Partnership was formed by The Cleveland Foundation, The George Gund Foundation, and The Cleveland Cultural Coalition.

### ***Statistical Summary:***

Cleveland Residents	
Population / Households	1,863,479 / 892,596
Percentage of households that are affluent	2.45%
Number of affluent households	22,158
AGI of households reporting charitable contributions	\$86,794
Average contributions of h'holds reporting charitable contributions	\$3,029

Cleveland Nonprofit Arts and Cultural Organizations	
Number of Organizations included	50
Total Expenses	\$140,905,646
Average Expenses	\$2,818,113
Total Assets	\$568,234,855
Average Assets	\$11,364,697

Cleveland Foundations	
Number of Foundations included	58
Total Assets	\$2,982,410,263
Total Giving	\$200,201,504
Giving to Arts & Culture	\$56,431,236
Percentage of Giving to Arts & Culture	28.19%
Assets Devoted to Arts & Culture	\$584,026,856

Cleveland, Ohio  
Arts & Culture Organizations  
Income, Expenses & Assets

ORGANIZATION	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
African American Museum	\$234,238	\$235,872	\$0	-\$434	\$591	\$0	\$157
Apollos Fire The Cleveland Baroque Orchestra	\$643,490	\$705,286	\$0	\$23,571	\$115,000	\$0	\$138,571
Blossom Music Center Endowment Fund	\$1,271,844	\$395,272	\$13,436,761	\$5,656,298	\$5,007,585	\$3,725,013	\$14,388,896
Cara Mia, LLP	\$37,249,428	\$36,650,586	\$2,299,921	\$34,633,207	\$16,831,097	\$3,154,028	\$54,618,332
Cleveland Artists Foundation	\$209,719	\$189,212	\$0	\$0	\$0	\$0	\$0
Cleveland Ballet	\$5,324,850	\$6,306,864	\$0	-\$1,639,864	\$0	\$217,600	-\$1,422,264
Cleveland Chamber Music Society	\$147,546	\$139,784	\$1,234,441	\$1,247,662	\$0	\$0	\$1,247,662
Cleveland Contemporary Dance Theater	\$179,303	\$166,420	\$0	\$8,633	\$0	\$0	\$8,633
Cleveland Institute of Art	\$15,971,141	\$17,699,360	\$22,644,572	\$188,815,548	\$1,572,732	\$11,623,230	\$202,011,510
Cleveland Institute of Music	\$14,201,136	\$15,671,783	\$37,368,881	\$17,148,168	\$15,144,384	\$19,382,903	\$51,675,455
Cleveland Jazz Orchestra	\$145,850	\$117,753	\$0	\$7,201	\$0	\$0	\$7,201
Cleveland Jewish Museum	\$2,034,521	\$53,887	\$583	\$1,980,634	\$0	\$0	\$1,980,634
Cleveland Museum of Natural History	\$13,591,163	\$9,625,950	\$83,686,714	\$65,406,906	\$1,114,369	\$39,431,616	\$105,952,891
Cleveland Play House	\$6,758,854	\$7,917,452	\$6,402,495	\$10,231,565	\$822,208	\$4,424,311	\$15,478,084
Cleveland Pops Orchestra	\$606,139	\$608,952	\$0	-\$63,233	\$22,341	\$0	-\$40,892
Cleveland Public Art, Inc.	\$461,344	\$618,169	\$99,963	\$85,670	\$206,477	\$0	\$292,147
Cleveland Public Theatre, Inc.	\$905,075	\$1,068,746	\$0	\$762,420	\$77,429	\$0	\$839,849
Cleveland Signstage Theatre, Inc.	\$154,556	\$165,284	\$0	-\$88,954	\$0	\$0	-\$88,954
Dobama Theatre, Inc.	\$258,623	\$313,502	\$0	\$32,761	\$133,173	\$0	\$165,934
East Cleveland Theater	\$202,001	\$226,978	\$0	\$0	\$0	\$0	\$0
Ensemble Theater	\$190,383	\$197,843	\$0	-\$27,366	\$0	\$0	-\$27,366
Fairmount Music Education Fund Inc	\$139,786	\$147,212	\$0	\$0	\$0	\$0	\$0
Great Lakes Theater Festival, Inc.	\$3,585,938	\$3,345,918	\$0	-\$827,805	\$372,900	\$400,000	-\$54,905
Groundworks Dancetheater	\$187,462	\$148,099	\$0	\$0	\$0	\$0	\$0
Harbor Heritage Society	\$435,251	\$391,816	\$0	\$91,111	\$56,012	\$0	\$147,123
Healthspace Cleveland	\$3,059,243	\$2,542,315	\$0	\$6,203,096	\$7,039,910	\$7,840,864	\$21,083,870
Huntington Theatre, Inc.	\$150,658	\$155,190	\$0	\$0	\$0	\$0	\$0
Intermuseum Conservation Association	\$688,425	\$874,166	\$303,042	\$2,132,186	\$28,455	\$0	\$2,160,641
International Womens Air And Space Museum, Inc.	\$583,528	\$83,290	\$100,000	\$663,691	\$32,196	\$0	\$695,887
Karamu House	\$1,424,520	\$1,392,924	\$0	\$922,392	\$155,095	\$0	\$1,077,487
Lyric Opera Cleveland Corporation	\$435,214	\$558,489	\$13,477	-\$83,827	\$0	\$13,477	-\$70,350
Millikin Severance (Cleveland Museum of Art)	\$340,306	\$41,342	\$0	\$0	\$0	\$0	\$0
Music & Performing Arts at Trinity Cathedral, Inc.	\$200,880	\$257,861	\$0	-\$9,891	\$0	\$118,024	\$108,133
Near West Theatre	\$359,397	\$421,234	\$0	\$58,713	\$43,906	\$0	\$102,619
New Cleveland Opera Company	\$3,875,785	\$3,883,507	\$1,437,827	\$172,371	\$1,937,757	\$0	\$2,110,128
Northeast Ohio Jazz Society	\$105,189	\$139,772	\$0	\$0	\$0	\$0	\$0
Northern Ohio Childrens Performing Music Foundation, Inc.	\$376,109	\$363,696	\$49,040	\$170,090	\$8,196	\$0	\$178,286
Ohio Chamber Orchestra Society, Inc.	\$952,088	\$914,562	\$0	-\$187,426	\$94,050	\$0	-\$93,376
Piano International Association Of Northern Ohio	\$210,863	\$257,538	\$398,881	-\$15,367	\$51,420	\$532,147	\$568,200
Pianofest Inc	\$298,925	\$182,399	\$31,509	\$277,748	\$48,145	\$0	\$325,893
Pipes And Drums Of The Cleveland Police	\$109,655	\$107,936	\$0	\$0	\$0	\$0	\$0
Rainey Institute	\$327,600	\$375,638	\$2,052,784	\$2,034,004	\$104,110	\$36,950	\$2,175,064
Repertory Project, Inc.	\$169,524	\$189,268	\$0	-\$58,297	\$10,000	\$0	-\$48,297
Robert Page Singers And Orchestra	\$160,756	\$171,379	\$0	-\$23,658	\$0	\$0	-\$23,658
Rock And Roll Hall Of Fame And Museum Inc	\$17,459,563	\$16,022,825	\$3,458,572	\$5,819,062	\$51,397,212	\$0	\$57,216,274
Safmod Performance Ensemble, Inc.	\$130,167	\$119,633	\$0	\$18,230	\$0	\$0	\$18,230
Sculpture Center	\$252,913	\$299,259	\$0	\$68,812	\$0	\$0	\$68,812
Spaces	\$286,849	\$311,445	\$0	\$53,609	\$31,663	\$321,690	\$406,962
Western Reserve Historical Society	\$8,740,576	\$8,056,380	\$12,505,157	\$11,752,236	\$6,885,328	\$14,176,651	\$32,814,215
Zygot Press, Inc.	\$110,396	\$75,598	\$0	\$41,137	\$0	\$0	\$41,137
TOTALS	\$145,898,770	\$140,905,646	\$187,524,620	\$353,492,610	\$109,343,741	\$105,398,504	\$568,234,855
AVERAGE	\$2,917,975	\$2,818,113	\$3,750,492	\$7,069,852	\$2,186,875	\$2,107,970	\$11,364,697
MEDIAN	\$349,852	\$312,474	\$0	\$36,949	\$25,398	\$0	\$123,352

Foundation Giving to the Arts & Culture

FOUNDATION NAME	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
Abington Foundation, The	\$33,219,043	\$1,464,794	\$107,750	7.36%	\$2,443,587
Andrews Foundation, The	\$8,170,941	\$589,500	\$61,000	10.35%	\$845,509
Baker & Hostetler Foundation, The	\$20,627	\$204,977	\$12,485	6.09%	\$12,485
Baker & Hostetler Founders' Trust	\$452,265	\$286,000	\$40,000	13.99%	\$63,254
Cleveland Foundation, The*	\$1,520,736,774	\$75,620,259	\$8,923,191	11.80%	\$179,446,939
Codrington Charitable Foundation, George W., The	\$17,818,623	\$1,165,820	\$266,650	22.87%	\$4,075,531
DBJ Foundation, The	\$17,806,894	\$704,000	\$180,000	25.57%	\$4,552,899
DJ Foundation	\$6,346,948	\$358,714	\$210,000	58.54%	\$3,715,659
Drinko Charitable Foundation, Elizabeth G. & John D., The	\$506,315	\$343,000	\$15,000	4.37%	\$22,142
Dusenbury Charitable Trust, Warren and Zoann Little	\$625,384	\$212,750	\$65,000	30.55%	\$191,069
Ferro Foundation	\$153,865	\$398,650	\$117,600	29.50%	\$117,600
Firman Fund	\$11,280,369	\$611,500	\$20,000	3.27%	\$368,941
Forest City Enterprises Charitable Foundation, Inc.	\$222,000	\$3,534,136	\$314,392	8.90%	\$314,392
Foster Family Foundation, The	\$1,525,779	\$291,018	\$38,725	13.31%	\$203,031
Fox Charitable Foundation, Harry K. & Emma R., The	\$8,781,359	\$350,550	\$52,000	14.83%	\$1,302,612
Frohning Foundation, Inc., William O. and Gertrude Lewis, The	\$5,094,419	\$227,000	\$50,500	22.25%	\$1,133,340
Gibson Foundation, Inc.	\$49,775	\$136,527	\$2,500	1.83%	\$2,500
Ginn Charitable Trust, Frank Hadley Ginn and Cornelia Root, The	\$3,161,279	\$137,900	\$31,000	22.48%	\$710,657
Green Foundation, Roe, The	\$9,402,685	\$717,499	\$221,210	30.83%	\$2,898,914
Gries Charity Fund, Lucile and Robert H.	\$2,089,345	\$182,400	\$5,350	2.93%	\$61,283
Gund Foundation, George, The	\$448,453,097	\$19,078,471	\$1,867,975	9.79%	\$43,908,087
H.C.S. Foundation	\$94,518,810	\$3,819,050	\$975,300	25.54%	\$24,137,991
Hankins Foundation, The	\$6,320,866	\$298,500	\$92,000	30.82%	\$1,948,140
Hit Two Foundation	\$25,232	\$219,200	\$2,500	1.14%	\$2,500
Hoover Trust Fund, W. Henry	\$5,427,641	\$264,000	\$49,000	18.56%	\$1,007,403
Horvitz Foundation, Lois U.	\$4,532,923	\$1,144,796	\$300,000	26.21%	\$1,187,877
Humphrey Foundation, Gilbert W. & Louise Ireland	\$1,489,901	\$258,000	\$90,000	34.88%	\$519,733
Humphrey Fund, George M. and Pamela S.	\$20,628,621	\$1,470,400	\$49,000	3.33%	\$687,434
Kramer Charitable Foundation, Milton A. and Charlotte R.	\$5,821,744	\$366,464	\$37,762	10.30%	\$599,897
Krouse Foundation, Flora Dale	\$1,655,948	\$100,500	\$10,500	10.45%	\$173,009
Kulas Foundation	\$33,870,796	\$2,523,046	\$1,208,964	47.92%	\$16,229,816
Lincoln Electric Foundation, The	\$1,640,742	\$515,000	\$19,000	3.69%	\$60,532
Lippitt Foundation, Katherine Kenyon, The	\$5,292,823	\$455,500	\$36,000	7.90%	\$418,313
Mahan Charitable Trust, Alfred C.*	\$3,934,627	\$192,000	\$22,656	11.80%	\$464,286
Mandel Family Foundation, Morton and Barbara, The	\$67,568,437	\$3,806,773	\$73,000	1.92%	\$1,295,716
Mellen Foundation, The	\$2,387,125	\$797,200	\$55,000	6.90%	\$164,691
Miller Family Fund, Inc., Samuel H.	\$11,403,987	\$1,471,765	\$107,000	7.27%	\$829,091
Mixon Foundation, A. Malachi Mixon III & Barbara W.	\$768,938	\$516,390	\$134,265	26.00%	\$199,929
Morley Family Foundation, John C. and Sally S.	\$437,596	\$266,750	\$70,000	26.24%	\$114,833
Murch Foundation, The	\$16,495,316	\$728,358	\$238,358	32.73%	\$5,398,157
Murphy Foundation, John P.	\$51,958,742	\$2,610,756	\$1,117,500	42.80%	\$22,240,261
NCC Charitable Foundation*	\$96,632,554	\$17,972,966	\$2,120,810	11.80%	\$11,402,641
Northrup II Fund Trust, Edwin D.	\$2,438,861	\$103,174	\$27,000	26.17%	\$638,235
Norweb Foundation, The	\$1,541,116	\$140,000	\$37,600	26.86%	\$413,900
Ohio Savings Association Charitable Foundation	\$7,688,197	\$5,937,689	\$2,770	0.05%	\$3,587
Payne Fund, The	\$3,568,972	\$778,362	\$340,400	43.73%	\$1,560,814
Peterson Foundation, Thomas F., The	\$2,262,862	\$1,189,400	\$106,000	8.91%	\$201,668
Reinberger Foundation, The	\$74,352,236	\$3,458,321	\$562,000	16.25%	\$12,082,729
Rosenthal Family Foundation, Leighton A.	\$5,401,486	\$480,469	\$18,750	3.90%	\$210,790
Sage Cleveland Foundation, The	\$7,115,598	\$982,000	\$300,000	30.55%	\$2,173,808
Sears-Swetland Family Foundation, The	\$3,260,921	\$147,800	\$61,000	41.27%	\$1,345,847
Sherwin-Williams Foundation, The	\$14,409,374	\$709,925	\$66,950	9.43%	\$1,358,887
Smith Foundation, Kelvin and Eleanor, The	\$141,261,711	\$5,836,959	\$2,029,850	34.78%	\$49,124,910
South Waite Foundation, The	\$2,582,925	\$124,500	\$19,000	15.26%	\$394,181
Talbot Foundation, Nelson	\$2,918,616	\$109,703	\$19,205	17.51%	\$510,943
Watson Foundation, Walter E. and Caroline H.	\$6,711,759	\$381,555	\$21,000	5.50%	\$369,401
Cleveland Musical Arts Association	\$154,983,670	\$32,300,413	\$32,300,413	100.00%	\$154,983,670
J H Wade Trust for Cleveland Museum Of Art	\$23,180,804	\$1,108,355	\$1,108,355	100.00%	\$23,180,804
TOTALS	\$2,982,410,263	\$200,201,504	\$56,431,236	28.19%	\$584,026,856
AVERAGE	\$51,420,867	\$3,451,750	\$972,952	28.19%	\$10,069,429
MEDIAN	\$5,414,564	\$515,695	\$65,975	12.79%	\$699,045

\*Giving to the arts calculated at 11.8% of Total Giving

\*\*ACH Assets calculated as Giving x % of Giving



# Columbus, Ohio



## City Profile

page 24.

### *At a glance:*

Despite perennial funding challenges, Columbus' arts and culture institutions continue to receive critical acclaim—BalletMet's triumphant engagement at New York's Joyce Theatre, the Museum of Art's elegant exhibition "Circle of Bliss," the installations of home-town product Ann Hamilton. Yet these bright spots are growing less frequent as the symptoms of chronic under-capitalization weigh down the creative output of local organizations.

Columbus ranked dead last in nearly every category measured in this study—organizational assets, foundation assets, the number and percentage of affluent households. These statistics are further reinforced by the anecdotal evidence—the **"million dollar list" did not cite a single gift of \$1 million or more to central Ohio arts organizations in the past five years**. Nor does Columbus enjoy a stable source of public funding—such as St. Louis' tax district or Charlotte's well-funded arts council—to offset the scarcity of creative capital.

### *Statistical Summary:*

Columbus Residents	
Population / Households	1,394,666 / 639,764
Percentage of households that are affluent	1.89%
Number of affluent households	12,091
AGI of households reporting charitable contributions	\$77,548
Average contributions of h'holds reporting charitable contributions	\$2,328

Columbus Nonprofit Arts and Cultural Organizations	
Number of Organizations included	29
Total Expenses	\$92,071,808
Average Expenses	\$3,069,060
Total Assets	\$81,753,370
Average Assets	\$2,725,112

Columbus Foundations	
Number of Foundations included	24
Total Assets	\$829,144,075
Total Giving	\$77,033,294
Giving to Arts & Culture	\$8,497,938
Percentage of Giving to Arts & Culture	11.03%
Assets Devoted to Arts & Culture	\$93,968,205

**Columbus, Ohio**  
**Arts & Culture Organizations**  
**Income, Expenses & Assets**

ORGANIZATION	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
Ballet Metropolitan, Inc.	\$4,811,736	\$4,927,819	\$0	\$1,476,954	\$416,376	\$193,709	\$2,087,039
Capital Regiment Drum And Bugle Corps	\$5,276,690	\$5,364,927	\$0	\$102,525	\$0	\$0	\$102,525
Chamber Music Columbus	\$114,682	\$95,121	\$0	\$36,908	\$59,000	\$0	\$95,908
Columbus and Central Ohio Childrens Chorus Foundation	\$249,076	\$242,106	\$0	\$0	\$0	\$0	\$0
Columbus Association For The Performing Arts, Inc.	\$12,307,364	\$12,941,687	\$0	\$28,509,686	\$1,210,291	\$832,534	\$30,552,511
Columbus Childrens Theatre	\$634,885	\$644,301	\$0	\$36,685	\$34,579	\$28,304	\$99,568
Columbus Dance Theatre, Inc.	\$248,384	\$231,230	\$0	\$3,635	\$0	\$0	\$3,635
Columbus Gay Mens Chorus	\$148,053	\$144,787	\$0	\$10,570	\$0	\$2,007	\$12,577
Columbus Light Opera	\$286,941	\$284,200	\$0	\$20,952	\$0	\$6,031	\$26,983
Columbus Museum Of Art	\$8,629,899	\$6,773,149	\$7,203,671	\$6,234,356	\$1,382,115	20,560,771	\$28,177,242
Columbus Ohio Fire Fighters Museum, Inc.	\$161,062	\$167,782	\$0	\$1,028,096	\$0	\$0	\$1,028,096
Columbus Symphony Orchestra, Inc.	\$11,017,186	\$11,066,771	\$0	\$1,430,437	\$2,705,905	\$1,557,230	\$5,693,572
Community Arts Project, Inc.	\$1,582,970	\$1,586,505	\$0	\$3,155,931	\$185,580	\$0	\$3,341,511
Contemporary American Theatre Company	\$1,473,824	\$1,755,981	\$0	\$0	\$0	\$0	\$0
Ohio Historical Society	\$28,109,525	\$30,444,904	\$0	\$1,396,628	\$883,215	\$0	\$2,279,843
First Night Columbus, Inc.	\$330,003	\$322,124	\$0	\$25,195	\$0	\$0	\$25,195
Foundation For Visual Art	\$138,993	\$164,808	\$0	-\$6,926	\$0	\$0	-\$6,926
Greater Columbus Arts Council, Inc.	\$4,893,555	\$4,839,706	\$0	\$922,120	\$426,374	\$0	\$1,348,494
Jazz Arts Group Of Columbus	\$1,518,657	\$1,551,729	\$0	\$420,397	\$19,905	\$0	\$440,302
Ohio Designer-Craftsmen	\$176,453	\$165,593	\$0	\$504,572	\$3,667	\$5,000	\$513,239
Ohio Railway Museum	\$143,147	\$133,967	\$0	\$44,946	\$0	\$0	\$44,946
Opera Association Of Central Ohio	\$2,096,716	\$2,463,404	\$9,622	-\$244,222	\$255,785	\$358,077	\$369,640
Phoenix Theatre Circle	\$362,347	\$419,783	\$0	-\$68,476	\$0	\$12,266	-\$56,210
Pro Musica	\$950,228	\$965,147	\$0	\$504,481	\$10,000	\$35,800	\$550,281
Red Herring Theatre Company	\$130,242	\$116,737	\$0	-\$18,504	\$3,259	\$1,753	-\$13,492
Shadoart Productions, Inc.	\$361,058	\$375,377	\$0	\$0	\$0	\$0	\$0
Vaud-villities Foundation	\$285,829	\$303,409	\$0	\$0	\$0	\$0	\$0
Wexner Center Foundation (not including OSU)	\$4,391,070	\$3,047,902	\$0	\$4,603,991	\$0	\$0	\$4,603,991
Worthington Arts Council, Inc.	\$339,376	\$144,987	\$8,262	-\$8,150	\$333,306	\$0	\$325,156
TOTALS	\$91,169,951	\$91,685,943	\$7,221,555	\$50,122,787	\$7,929,357	\$23,593,482	\$81,645,626
AVERAGE	\$3,143,791	\$3,161,584	\$249,019	\$1,728,372	\$273,426	\$813,568	\$2,815,366
MEDIAN	\$362,347	\$419,783	\$0	\$36,908	\$3,259	\$0	\$102,525

Foundation Giving to the Arts & Culture

FOUNDATION NAME	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
Boles Family Foundation	\$3,929,810	\$190,000	\$24,000	12.63%	\$496,397
Columbus Foundation and Affiliated Organizations*	\$628,139,633	\$50,179,800	\$5,921,216	11.80%	\$74,120,477
Community Foundations, Inc.*	\$22,378,182	\$3,116,547	\$367,753	11.80%	\$2,640,625
Don M. Casto Foundation, The	\$959,673	\$148,500	\$7,500	5.05%	\$48,468
Donald and Edie Garlikov Family Foundation	\$900,016	\$50,766	\$7,500	14.77%	\$132,965
E.F. Wildermuth Foundation, The	\$5,085,933	\$567,333	\$26,000	4.58%	\$233,080
Edwards Foundation, Inc., The	\$53,488	\$296,317	\$48,500	16.37%	\$48,500**
English Family Foundation	\$2,600,391	\$134,500	\$31,000	23.05%	\$599,347
Fishel Foundation	\$2,455,128	\$499,700	\$20,500	4.10%	\$100,721
George Edward Durell Foundation	\$31,525,676	\$1,090,500	\$215,000	19.72%	\$6,215,516
Gerlach Foundation, Inc.	\$31,860,868	\$1,564,330	\$41,000	2.62%	\$835,051
Harry C. Moores Foundation	\$29,737,046	\$1,599,184	\$106,000	6.63%	\$1,971,085
Hazelbaker Foundation	\$1,379,601	\$98,625	\$31,669	32.11%	\$442,997
Joe and Jan Mollmann Foundation	\$191,001	\$9,950	\$1,000	10.05%	\$19,196
M/I Homes Foundation	\$5,736,730	\$1,675,020	\$27,000	1.61%	\$92,472
Miriam Stanley Schwartz, Jr.	\$6,856	\$225,000	\$18,500	8.22%	\$564
Montei Foundation	\$883,786	\$40,500	\$5,000	12.35%	\$109,109
Motorists Insurance Group Foundation, The	\$231,092	\$349,555	\$8,850	2.53%	\$8,850**
Nationwide Foundation	\$41,126,211	\$12,656,149	\$1,265,500	10.00%	\$4,112,248
Paul R. Gingher State Auto Insurance Companies Foundation	\$3,143,128	\$419,834	\$35,200	8.38%	\$263,528
Richard H. and Ann Shafer Foundation, The	\$3,027,439	\$144,000	\$4,500	3.13%	\$94,607
Thomas R. Gross Family Foundation	\$3,389,308	\$160,365	\$1,000	0.62%	\$21,135
Wasserstrom Foundation	\$2,619,692	\$173,050	\$1,700	0.98%	\$25,735
Wolfe Associates, Inc.	\$7,783,387	\$1,643,769	\$282,050	17.16%	\$1,335,531
TOTALS	\$829,144,075	\$77,033,294	\$8,497,938	11.03%	\$93,968,205
AVERAGE	\$34,547,670	\$3,209,721	\$354,081	11.03%	\$3,915,342
MEDIAN	\$3,085,284	\$322,936	\$26,500	8.21%	\$183,023

\*\*ACH Assets calculated as Giving x % of Giving

# Indianapolis, Indiana



## City Profile

page 27.

### **At a glance:**

With gleaming new museums, stable and acclaimed performing arts, and a growing audience, Indianapolis' arts scene is thriving. According to a study by Americans for the Arts, "the nonprofit arts are a \$294.4 million industry in Indianapolis—one that supports 10,412 full-time jobs and generates \$32.0 million in local and state government revenue. Nonprofit arts organizations in Indianapolis leverage a remarkable \$146.1 million in additional spending by arts audiences—spending that pumps vital revenue into [the] local [economy]."

Indianapolis clearly demonstrates the return that a community receives on a long-term investment in the arts—in their case largely attributable to the generosity and success of the Lilly family. In nearly every measure of creative capital—organizational assets, foundation assets, assets per capita or as a percent of expenses—the city's arts and cultural institutions enjoy remarkable funding. This has created vibrancy and stability—but not bloated operating budgets in comparison to their peers in other cities.

### **Statistical Summary:**

Indianapolis Residents	
Population / Households	1,474,128 / 663,158
Percentage of households that are affluent	2.20%
Number of affluent households	14,576
AGI of households reporting charitable contributions	\$86,054
Average contributions of h'holds reporting charitable contributions	\$3,164

Indianapolis Nonprofit Arts and Cultural Organizations	
Number of Organizations included	36
Total Expenses	\$142,574,673
Average Expenses	\$3,960,408
Total Assets	\$1,190,301,968
Average Assets	\$33,063,944

Indianapolis Foundations	
Number of Foundations included	28
Total Assets	\$12,003,630,731
Total Giving	\$523,846,565
Giving to Arts & Culture	\$63,810,303
Percentage of Giving to Arts & Culture	12.18%
Assets Devoted to Arts & Culture	\$1,476,705,869

**Indianapolis, Indiana**  
**Arts & Culture Organizations**  
**Income, Expenses & Assets**

ORGANIZATION	ASSETS						
	REVENUE	EXPENSES	EOY SECURITIES	EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	EOY TOTAL ASSETS
American Cabaret Theatre, Inc.	\$940,581	\$1,029,346	\$0	\$1,397,906	\$0	\$919,147	\$2,317,053
Blues Society Of Indiana, Inc.	\$754,005	\$768,378	\$0	\$0	\$0	\$0	\$0
Booth Tarkington Civic Theatre Of Indianapolis, Inc.	\$1,717,648	\$1,665,098	\$628,401	\$2,257,664	\$1,088,884	\$628,401	\$3,974,949
Cathedral Arts, Inc.	\$751,460	\$1,060,415	\$0	\$0	\$0	\$0	\$0
Children's Museum of Indianapolis	\$14,791,178	\$26,136,196	\$250,394,561	\$243,979,600	\$14,420,900	\$19,369,327	\$277,769,827
Conner Prairie Museum (An Earham Museum)	\$8,068,798	\$8,595,593	\$62,985,639	\$59,259,475	\$276,403	\$1,221,403	\$60,757,281
Dance Kaleidoscope, Inc.	\$853,031	\$801,020	\$0	\$216,737	\$151,155	\$1,700	\$369,592
Edyvean Repertory Theatre, Inc.	\$487,315	\$542,202	\$0	-\$2,220	\$0	\$0	-\$2,220
Eiteljorg Museum Of American Indian And Western Art, Inc.	\$9,352,728	\$5,056,943	\$3,281,794	\$24,528,047	\$13,674,137	\$85,000	\$38,287,184
Festival Music Society Of Indiana	\$112,051	\$113,853	\$485,719	\$511,205	\$0	\$0	\$511,205
Footlite Musicals, Inc	\$143,466	\$150,493	\$0	\$80,228	\$0	\$0	\$80,228
Indiana Historical Society	\$9,198,468	\$9,210,013	\$108,907,306	\$119,420,483	\$1,933,703	\$32,678	\$121,386,864
Indiana Opera Society, Inc.	\$2,539,374	\$2,343,326	\$0	-\$61,498	\$426,765	\$0	\$365,267
Indiana Repertory Theatre, Inc.	\$5,576,519	\$5,370,124	\$7,521,696	\$5,712,086	\$4,649,764	\$6,000,000	\$16,361,850
Indiana State Museum Foundation, Inc.	\$3,124,822	\$5,732,154	\$1,212,863	\$20,036,370	\$3,258,404	\$372,881	\$23,667,655
Indiana State School Music Association, Inc.	\$1,215,639	\$1,206,414	\$0	\$455,341	\$0	\$862	\$456,203
Indianapolis Arts Center	\$3,539,379	\$2,847,826	\$606,766	\$5,198,828	\$2,705,563	\$171,042	\$8,075,433
Indianapolis Ballet Theatre, Inc.	\$5,780,049	\$2,729,195	\$0	-\$610,362	\$3,023,734	\$20,000	\$2,433,372
Indianapolis Chamber Orchestra, Inc.	\$399,940	\$543,481	\$1,908	\$489,627	\$0	\$959,264	\$1,448,891
Indianapolis Children's Choir	\$1,324,110	\$1,539,084	\$0	\$914,443	\$484,574	\$3,427	\$1,402,444
Indianapolis Civic Theatre	\$1,717,648	\$1,665,098	\$628,401	\$2,257,664	\$1,088,884	\$628,401	\$3,974,949
Indianapolis Dance Company, Inc. (GHDT)	\$124,507	\$127,691	\$0	\$0	\$0	\$0	\$0
Indianapolis Museum Of Art, Inc.	\$25,042,362	\$19,335,362	\$316,664,000	\$376,815,475	\$37,846,000	\$82,711,000	\$497,372,475
Indianapolis Opera	\$49,081	\$125,000	\$0	\$788,917	\$0	\$0	\$788,917
Indianapolis Symphonic Choir, Inc.	\$174,469	\$276,966	\$2,417	\$13,048	\$1,250	\$0	\$14,298
Indianapolis Symphony Orchestra	\$23,135,203	\$28,841,008	\$3,926,049	-\$2,175,439	\$11,411,095	\$0	\$9,235,656
Indianapolis Symphony Orchestra Foundation, Inc.	\$3,588,887	\$10,703,694	\$95,462,151	\$73,825,627	\$11,555,090	\$27,665,197	\$113,045,914
Madame Walker Urban Life Center, Inc.	\$1,178,722	\$942,460	\$0	\$3,995,542	\$0	\$0	\$3,995,542
New Harmony Project, Inc.	\$171,443	\$149,052	\$0	\$145,634	\$13,735	\$0	\$159,369
Penrod Society	\$304,763	\$282,425	\$0	\$138,193	\$0	\$0	\$138,193
Philharmonic Orchestra Of Indianapolis, Inc.	\$161,502	\$111,642	\$82,328	\$69,359	\$0	\$50,516	\$119,875
Phoenix Theatre, Inc.	\$600,884	\$557,460	\$231,367	\$216,483	\$31,955	\$224,003	\$472,441
Storytelling Arts Of Indiana	\$198,707	\$176,244	\$0	\$57,286	\$0	\$0	\$57,286
Theater On The Square, Inc.	\$275,728	\$174,790	\$0	-\$7,156	\$100,091	\$0	\$92,935
Women In The Arts Inc National Womens Music Festival	\$196,991	\$219,021	\$0	\$0	\$0	\$0	\$0
Young Audiences Of Indiana, Inc.	\$1,289,212	\$1,445,606	\$0	\$564,970	\$606,070	\$0	\$1,171,040
TOTALS	\$128,880,670	\$142,574,673	\$853,023,366	\$940,489,563	\$108,748,156	\$141,064,249	\$1,190,301,968
AVERAGE	\$3,580,019	\$3,960,408	\$23,695,094	\$26,124,710	\$3,020,782	\$3,918,451	\$33,063,944
MEDIAN	\$1,059,652	\$1,044,881	\$0	\$472,484	\$66,023	\$1,281	\$979,979

**Indianapolis, Indiana**  
**Foundation Giving to the Arts & Culture**

FOUNDATION NAME	ASSETS	GIVING	% OF		ASSETS DEVOTED TO ARTS AND CULTURE
			GIVING TO ARTS AND CULTURE	ARTS AND CULTURE	
Ackerman Foundation, The	\$7,993,473	\$346,500	\$25,500	7.36%	\$588,264
ADL Charitable Trust	\$6,576,989	\$313,854	\$5,000	1.59%	\$104,778
Annis Educational Foundation, R. B., The	\$11,643,045	\$237,846	\$183,675	77.22%	\$8,991,264
Ayres Foundation, Inc.	\$3,603,460	\$152,230	\$34,000	22.33%	\$804,819
Burriss Foundation, Inc., Jerry L. and Barbara J.	\$3,738,222	\$107,500	\$7,500	6.98%	\$260,806
Central Indiana Community Foundation*	\$419,349,010	\$13,362,362	\$1,576,759	11.80%	\$49,483,183
Clowes Fund, Inc., The	\$71,567,390	\$2,836,161	\$1,342,000	47.32%	\$33,863,888
Cohen Family Foundation, Inc., The	\$6,236,699	\$175,694	\$8,200	4.67%	\$291,080
DeHaan Family Foundation, Christel	\$44,328,372	\$1,052,993	\$814,765	77.38%	\$34,299,569
Glick Foundation Corporation, Eugene and Marilyn	\$84,648,617	\$3,362,786	\$83,383	2.48%	\$2,098,931
Griffith Foundation, W. C., The	\$11,437,456	\$481,100	\$124,000	25.77%	\$2,947,920
Hanson Family Foundation, Michael E. and Jacquelyn I.	\$1,594,144	\$102,593	\$30,000	29.24%	\$466,156
Hilbert Foundation, The	\$100,212	\$394,199	\$25,000	6.34%	\$6,355
Jordan Foundation, Arthur	\$16,284,428	\$710,000	\$160,500	22.61%	\$3,681,198
Klapper Family Foundation, Inc., The	\$7,195,131	\$171,181	\$13,100	7.65%	\$550,623
Lacy Foundation	\$5,202,524	\$195,257	\$18,500	9.47%	\$492,923
Lilly and Company Foundation, Eli*	\$88,280,528	\$19,307,901	\$2,278,332	11.80%	\$10,417,102
Lilly Endowment Inc.*	\$10,849,402,388	\$462,336,723	\$54,555,733	11.80%	\$1,280,229,482
Mervis Family Foundation	\$31,448	\$128,341	\$10,325	8.04%	\$10,325**
O'Brien Foundation, Inc., Cornelius and Anna Cook	\$1,873,723	\$318,895	\$52,750	16.54%	\$309,942
Owings Family Foundation, Inc., Frank N.	\$120,326	\$153,200	\$2,000	1.31%	\$2,000**
Pulliam Charitable Trust, Nina Mason*	\$341,181,845	\$13,225,995	\$1,560,667	11.80%	\$40,259,458
Sablosky Family Foundation, Inc., The	\$4,482,923	\$133,863	\$34,630	25.87%	\$1,159,720
Simon Charitable Foundation Number One, Melvin and Bren, The	\$2,248,952	\$2,684,185	\$95,000	3.54%	\$95,000**
Simon Charitable Foundation, Max, The	\$6,315,119	\$794,856	\$404,383	50.88%	\$3,212,817
Tobias Fund, Randall L. & Marianne W.	\$2,732,986	\$521,457	\$356,000	68.27%	\$1,865,816
Transformation Trust, Inc.	\$3,588,186	\$133,063	\$6,500	4.88%	\$175,279
Westwood Foundation, The	\$1,873,135	\$105,830	\$2,100	1.98%	\$37,169
TOTALS	\$12,003,630,731	\$523,846,565	\$63,810,303	12.18%	\$1,476,705,869
AVERAGE	\$428,701,098	\$18,708,806	\$2,278,939	12.18%	\$52,739,495
MEDIAN	\$6,275,909	\$332,698	\$43,690	13.13%	\$696,542

\*Giving to the arts calculated at 11.8% of Total Giving

\*\*ACH Assets calculated as Giving x % of Giving

# Milwaukee, Wisconsin



## City Profile

page 30.

### **At a glance:**

Arts organizations in Milwaukee enjoy diverse funding sources—including 65 foundations, a robust united arts fund, a County Fund for the Arts, and a highly philanthropic public. Milwaukee's percentage of affluent households is among the highest in the comparison group (2.73%).

As a result, "Milwaukee's arts and cultural community has truly blossomed and become nationally recognized as an innovative leader over the last twenty years. Milwaukee has not one, but two opera companies. It is also home to a ballet company, a symphonic orchestra, art museums, galleries, and numerous professional theatres," according to [www.metromilwaukee.org](http://www.metromilwaukee.org).

### **Statistical Summary:**

Milwaukee Residents	
Population / Households	1,500,741 / 601,735
Percentage of households that are affluent	2.73%
Number of affluent households	16,445
AGI of households reporting charitable contributions	\$77,803
Average contributions of h'holds reporting charitable contributions	\$2,720

Milwaukee Nonprofit Arts and Cultural Organizations	
Number of Organizations included	38
Total Expenses	\$70,536,369
Average Expenses	\$2,519,156
Total Assets	\$178,802,889
Average Assets	\$6,385,817

Milwaukee Foundations	
Number of Foundations included	65
Total Assets	\$868,692,214
Total Giving	\$81,070,188
Giving to Arts & Culture	\$16,431,858
Percentage of Giving to Arts & Culture	20.27%
Assets Devoted to Arts & Culture	\$178,577,818

**Milwaukee, Wisconsin  
Arts & Culture Organizations  
Income, Expenses & Assets**

ORGANIZATION	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
Artist Series at The Pabst, Inc.	\$228,061	\$285,096	\$0	-\$741	\$0	\$0	-\$741
Bel Canto Chorus of Milwaukee, Inc.	\$309,532	\$323,420	\$138,592	\$81,358	\$0	\$135,177	\$216,535
Bialystock & Bloom Company	\$220,638	\$220,955	\$0	-\$22,772	\$0	\$0	-\$22,772
Boulevard Ensemble, Inc.	\$123,710	\$122,376	\$0	\$41,865	\$0	\$0	\$41,865
Captain Frederick Pabst Mansion, Inc.	\$549,234	\$318,840	\$0	\$1,668,079	\$340,837	\$0	\$2,008,916
Friends of Channel 10 / 36, Inc.	\$5,514,547	\$5,207,103	\$3,208,146	\$5,037,105	\$0	\$0	\$5,037,105
City Ballet Theatre, Inc.	\$150,604	\$141,194	\$0	\$0	\$0	\$0	\$0
Civic Theater Corp.	\$1,860,736	\$1,910,736	\$0	\$150,000	\$0	\$0	\$150,000
Danceworks, Inc.	\$429,789	\$442,878	\$0	\$207,596	\$0	\$0	\$207,596
Discovery World The James Lovell Museum of Science Economics	\$1,761,831	\$2,199,711	\$1,848,156	\$2,084,207	\$4,900,108	\$0	\$6,984,315
First Stage Milwaukee, Inc. Performing Arts Center	\$2,656,373	\$2,632,724	\$0	-\$130,746	\$202,485	\$0	\$71,739
Florentine Opera Co., Inc.	\$3,786,129	\$3,644,769	\$2,468,113	\$1,466,884	\$1,718,444	\$1,014,902	\$4,200,230
Friends Of The Milwaukee Public Museum, Inc.	\$243,974	\$229,851	\$413,346	\$62,793	\$370,257	\$0	\$433,050
Gatherings on the Green, Inc.	\$256,730	\$259,498	\$0	\$70,074	\$0	\$0	\$70,074
International Clown Hall of Fame and Research Center, Inc.	\$130,543	\$148,824	\$0	\$0	\$0	\$0	\$0
Irish Festivals, Inc.	\$2,141,851	\$2,002,414	\$2,137,070	\$3,046,360	\$0	\$0	\$3,046,360
Ko-thi, Inc.	\$584,987	\$752,012	\$0	-\$89,985	\$77,743	\$0	-\$12,242
Latino Arts, Inc.	\$397,338	\$394,416	\$0	\$52,199	\$0	\$0	\$52,199
Milwaukee Art Museum, Inc.	\$14,223,406	\$19,331,628	\$18,940,695	\$4,517,004	\$86,153,827	\$15,780,974	\$106,451,805
Milwaukee Ballet Company, Inc.	\$4,747,866	\$5,196,862	\$0	\$1,247,104	\$26,667	\$105,618	\$1,379,389
Milwaukee Ballet Orchestra, Inc.	\$209,577	\$209,577	\$0	\$0	\$0	\$0	\$0
Milwaukee Chamber Orchestra, Inc.	\$137,869	\$143,427	\$0	\$0	\$0	\$0	\$0
Milwaukee Chamber Theatre, Ltd.	\$788,238	\$781,002	\$0	\$671	\$34,489	\$0	\$35,160
Milwaukee Childrens Choir, Inc.	\$199,706	\$191,248	\$0	\$26,038	\$0	\$0	\$26,038
Milwaukee Public Theatre	\$437,256	\$439,761	\$0	\$0	\$0	\$0	\$0
Milwaukee Repertory Theater, Inc.	\$10,057,760	\$9,570,028	\$10,836,306	\$10,454,626	\$2,230,963	\$7,805,697	\$20,491,286
Milwaukee Shakespeare Company	\$209,714	\$220,913	\$0	\$28,745	\$0	\$0	\$28,745
Milwaukee Showcase Productions Festival City Symphony	\$368,567	\$295,208	\$0	\$893,413	\$0	\$0	\$893,413
Milwaukee Symphony Orchestra, Inc.	\$15,264,255	\$16,228,291	\$0	-\$6,837,185	\$423,085	\$30,737,480	\$24,323,380
Milwaukee Youth Arts Center, Inc.	\$2,411,849	\$314,019	\$0	\$2,752,824	\$0	\$0	\$2,752,824
Milwaukee Youth Symphony Orchestra, Inc.	\$1,012,853	\$693,529	\$3,164,094	\$2,111,966	\$821,965	\$345,136	\$3,279,067
Modjeska Theatre Company, Inc.	\$243,591	\$274,874	\$0	\$1,529	\$56,474	\$0	\$58,003
Music In The Park, Inc.	\$220,285	\$220,909	\$0	\$0	\$0	\$0	\$0
Next Act Theatre, Inc.	\$511,068	\$540,833	\$0	\$238,151	\$5,223	\$0	\$243,374
Present Music, Inc.	\$384,728	\$384,722	\$0	-\$32,594	\$3,948	\$16,327	-\$12,319
Skylight Opera Theatre Corp	\$2,784,018	\$2,972,025	\$0	\$3,364,563	\$653,877	\$1,126,156	\$5,144,596
Theatre X, Inc.	\$192,606	\$180,401	\$0	\$26,500	\$8,000	\$0	\$34,500
Wisconsin Conservatory of Music, Inc.	\$2,101,040	\$2,282,604	\$787,287	\$4,554,264	\$470,667	\$787,287	\$5,812,218
TOTALS	\$66,704,177	\$70,536,369	\$38,746,911	\$27,825,198	\$93,258,114	\$57,719,577	\$178,802,889
AVERAGE	\$2,382,292	\$2,519,156	\$1,383,818	\$993,757	\$3,330,647	\$2,061,413	\$6,385,817
MEDIAN	\$474,162	\$417,089	\$0	\$40,472	\$6,612	\$0	\$70,907



**Milwaukee, Wisconsin  
Foundation Giving to the Arts & Culture**

FOUNDATION NAME	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
Apple Family Foundation, Inc.	\$774,066	\$97,500	\$17,500	17.95%	\$138,935
Badger Meter Foundation, Inc.	\$1,786,214	\$165,219	\$25,100	15.19%	\$271,361
Baird and Company Foundation, Inc., Robert W.	\$7,945,086	\$1,199,165	\$83,325	6.95%	\$552,071
Birmschein Foundation, Inc., Alvin and Marion	\$4,047,958	\$212,000	\$23,000	10.85%	\$439,165
Chapman Foundation	\$4,629,410	\$844,225	104580	12.39%	\$573,477
Charter Manufacturing Company Foundation, Inc.	\$1,079,884	\$758,275	\$28,000	3.69%	\$39,876
Cobalt Corporation Foundation, Inc.	\$3,517,801	\$611,223	\$105,050	17.19%	\$604,599
Coleman Charitable Foundation, Inc., David & Ruth	\$9,192,657	\$559,000	\$20,000	3.58%	\$328,896
Cudahy Fund, Patrick and Anna M.	\$20,358,468	\$1,061,699	\$69,000	6.50%	\$1,323,100
Demmer Charitable Trust, Mae E.	\$9,098,833	\$420,000	\$160,000	38.10%	\$3,466,222
Demmer Foundation, Edward U.	\$850,437	\$110,500	\$31,500	28.51%	\$242,432
Ellinger Foundation, Inc., Albert J. & Flora H.	\$2,025,903	\$104,900	\$25,000	23.83%	\$482,818
Elliott Foundation, Inc., John A.	\$442,312	\$205,000	\$775	0.38%	\$1,672
Epstein Family Foundation, Inc., H. L.	\$2,151,456	\$148,210	\$500	0.34%	\$7,258
F & A Trucking Foundation, Inc., The	\$114,083	\$119,950	\$6,500	5.42%	\$6,500
French Family Foundation, Inc., J. L.	\$667,921	\$221,258	\$30,400	13.74%	\$91,770
Gardner Foundation, The	\$2,106,318	\$102,000	\$22,000	21.57%	\$454,304
Harley-Davidson Foundation, Inc.	\$15,233,808	\$2,236,422	\$135,000	6.04%	\$919,578
Herzfeld Foundation, Inc., Richard & Ethel, The	\$73,622,785	\$2,421,316	\$948,848	39.19%	\$28,850,771
Hunt Memorial Trust, Frieda & William	\$6,399,205	\$251,300	\$75,000	29.84%	\$1,909,830
Inbusch Foundation, Inc., Dorothy	\$3,635,345	\$159,900	\$35,000	21.89%	\$795,729
Jacobus Family Foundation, Charles D.	\$4,937,281	\$243,740	\$5,500	2.26%	\$111,410
Jones Foundation, Stella H.	\$3,417,784	\$124,500	\$61,000	49.00%	\$1,674,577
Joy Global Foundation, Inc.	\$10,473,718	\$790,732	\$136,250	17.23%	\$1,804,713
Kadish Foundation, Halbert & Alice	\$5,640,392	\$1,199,800	\$187,000	15.59%	\$879,108
Koss Foundation, Inc.	\$2,014,827	\$196,008	\$20,500	10.46%	\$210,726
Krause Family Foundation	\$6,247,906	\$274,871	\$68,500	24.92%	\$1,557,027
Kritzik Family Foundation, Inc., Stanley	\$14,402	\$146,200	\$16,900	11.56%	\$16,900
Leach Foundation, Inc., Elmer, The	\$2,992,885	\$108,500	\$4,500	4.15%	\$124,129
Lonstorff Trust, Camille A.	\$3,140,104	\$125,000	\$33,000	26.40%	\$828,987
Lubar Family Foundation, Inc., The	\$1,958,428	\$598,547	\$268,967	44.94%	\$880,052
Manpower Foundation, Inc.	\$488,271	\$431,299	\$94,162	21.83%	\$106,600
Marcus Corporation Foundation, Inc.	\$1,351,549	\$619,818	\$137,020	22.11%	\$298,780
Marquette Electronics Foundation	\$205,275	\$260,636	\$35,206	13.51%	\$35,206
Marshall & Ilsley Foundation, Inc.	\$224,120	\$2,442,950	\$475,000	19.44%	\$475,000
Martin Family Foundation	\$6,249,727	\$325,000	\$24,600	7.57%	\$473,056
Milwaukee Foundation, Greater	\$340,954,094	\$23,128,124	\$3,256,546	14.08%	\$48,007,901
Northwestern Mutual Foundation	\$74,533,170	\$12,938,786	\$2,015,634	15.58%	\$11,610,950
Peck Foundation, Inc., Milton and Lillian	\$10,260,000	\$647,333	\$102,000	15.76%	\$1,616,664
Petullo Foundation, Inc., Anthony	\$2,026,440	\$123,048	\$42,797	34.78%	\$704,811
Pick Charitable Trust, Melitta S.	\$25,335,201	\$1,140,000	\$272,000	23.86%	\$6,044,890
Pollybill Foundation, Inc.	\$3,916,717	\$1,539,250	\$507,000	32.94%	\$1,290,093
Posner Foundation, Inc., Gene & Ruth	\$5,826,316	\$326,272	\$16,750	5.13%	\$299,109
PPC Foundation	\$133,423	\$330,437	\$18,550	5.61%	\$18,550
Puelicher Foundation, Inc.	\$8,966,584	\$1,154,000	\$620,000	53.73%	\$4,817,402
Rao Foundation, Kailas J. & Becky L.	\$611,716	\$205,875	\$101,100	49.11%	\$300,398
RDK Foundation	\$6,090,802	\$242,624	\$220,000	90.68%	\$5,522,852
Rexnord Foundation Inc.	\$3,843,000	\$397,846	\$20,480	5.15%	\$197,827
Rolfs Foundation, Inc., Robert T.	\$1,348,675	\$3,440,000	\$218,000	6.34%	\$218,000
Ross Memorial Foundation, Inc., Will	\$1,965,653	\$302,700	\$31,500	10.41%	\$204,553
Sampson Charitable Fund, Inc., Scott & Peggy	\$2,715,546	\$129,113	\$2,200	1.70%	\$46,271
Schlegel Foundation, Oscar C. & Augusta	\$8,060,000	\$391,100	\$33,000	8.44%	\$680,082
Schoenleber Foundation, Inc.	\$7,740,000	\$390,000	\$120,000	30.77%	\$2,381,538
Sensient Technologies Foundation, Inc.	\$9,107,836	\$582,793	\$135,500	23.25%	\$2,117,582
Soref Charitable Trust, Daniel M.	\$52,690,679	\$566,242	\$115,000	20.31%	\$10,701,128
Stratton Foundation, Inc., The	\$3,070,913	\$119,500	\$32,000	26.78%	\$822,337
Tallman Trust, George K.	\$2,449,488	\$109,700	\$9,000	8.20%	\$200,961
Telly Foundation, Ltd.	\$1,404,821	\$107,210	\$15,250	14.22%	\$199,828
Uihlein Charitable Foundation, Inc., David and Julia	\$6,567	\$2,986,750	\$810,900	27.15%	\$810,900
Uihlein Foundation, Robert A.	\$4,020,684	\$150,700	\$10,000	6.64%	\$266,801
Van Drisse Charitable Trust, Joseph & Sarah	\$5,206,984	\$231,500	\$22,000	9.50%	\$494,832
Walter Family Trust, Byron L.	\$12,956,000	\$656,298	\$86,300	13.15%	\$1,703,651
Waterman & E. Blade Charitable Foundation, Inc., S. B.	\$14,427,270	\$585,000	\$530,000	90.60%	\$13,070,860
Wisconsin Energy Corporation Foundation, Inc.	\$30,382,501	\$5,337,677	\$640,521	12.00%	\$3,645,899
Pabst Theater Foundation, Inc.	\$9,604,515	\$2,913,647	\$2,913,647	100.00%	\$9,604,515
TOTALS	\$868,692,214	\$81,070,188	\$16,431,858	20.27%	\$178,577,818
AVERAGE	\$13,364,496	\$1,247,234	\$252,798	20.27%	\$2,747,351
MEDIAN	\$3,843,000	\$330,437	\$61,000	18.46%	\$552,071

\*\*ACH Assets calculated as Giving x % of Giving



### **At a glance:**

St. Louis is the most populous community studied, enjoys the highest household adjusted gross income, and also has the greatest number of foundations supporting arts and culture. The community's arts environment is thriving, which seems to contradict the apparent weakness in organizational endowments and foundation assets. However, arts and cultural organizations in St. Louis benefit from extraordinary support from permanent public funding sources.

The Zoo-Museum Taxing District, approved by the voters of St. Louis County in 1971, now provides approximately \$50 million to five organizations: the Zoo, Science Center, Art Museum, Historical Society, and Botanical Garden. The Art Museum alone receives an estimated \$17 million annually from this fund, equivalent to the income generated by \$340 million in permanently endowed assets.

Additionally, the St. Louis Regional Arts Commission distributes \$3.6 million to the area's arts organizations, funded by a portion of the hotel/motel room tax, the equivalent of \$72 million in permanently endowed assets.

### **Statistical Summary:**

St. Louis Residents	
Population / Households	2,517,750 / 1,029,260
Percentage of households that are affluent	2.61%
Number of affluent households	26,837
AGI of households reporting charitable contributions	\$107,630
Average contributions of h'holds reporting charitable contributions	\$3,426

St. Louis Nonprofit Arts and Cultural Organizations	
Number of Organizations included	39
Total Expenses	\$82,401,255
Average Expenses	\$2,112,852
Total Assets	\$90,304,756
Average Assets	\$2,315,507

St. Louis Foundations	
Number of Foundations included	68
Total Assets	\$698,825,893
Total Giving	\$112,636,114
Giving to Arts & Culture	\$16,605,785
Percentage of Giving to Arts & Culture	14.74%
Assets Devoted to Arts & Culture	\$168,806,782

St. Louis, Missouri  
Arts & Culture Organizations  
Income, Expenses & Assets

ORGANIZATION	REVENUE	EXPENSES	EOY SECURITIES	ASSETS			EOY TOTAL ASSETS
				EOY UNRESTRICTED	EOY TEMPORARILY RESTRICTED	EOY PERMANENTLY RESTRICTED	
Annonnyarts	\$105,110	\$60,576	\$0	\$5,980	\$0	\$0	\$5,980
Art St. Louis	\$166,802	\$179,267	\$0	\$100,714	\$0	\$0	\$100,714
Arts & Education Council of Greater St. Louis	\$1,818,062	\$2,058,400	\$0	\$236,909	\$186,584	\$51,000	\$474,493
Bach Society of St. Louis	\$246,841	\$235,062	\$0	\$33,665	\$0	\$121,084	\$154,749
Circus Art Foundation of Missouri	\$458,972	\$495,182	\$0	-\$58,124	\$0	\$0	-\$58,124
City Museum	\$2,540,752	\$2,767,135	\$0	\$1,194,533	\$203,181	\$0	\$1,397,714
Compton Heights Concert Band	\$1,018,924	\$1,070,814	\$54,631	\$50,830	\$13,572	\$0	\$64,402
Contemporary Art Museum St. Louis	\$1,851,345	\$1,011,932	\$0	-\$112,884	\$7,037,457	\$0	\$6,924,573
Dance Saint Louis	\$1,666,150	\$1,817,074	\$19,898	\$161,909	\$60,000	\$15,150	\$237,059
Dimensions Dance Company	\$208,055	\$200,857	\$0	\$33,521	\$0	\$0	\$33,521
Dunham Fund For Research And Development Of Cultural Arts	\$1,246,890	\$352,080	\$0	\$0	\$0	\$0	\$0
Friends of KWMU, Inc.	\$1,405,591	\$1,335,400	\$0	\$202,897	\$0	\$0	\$202,897
Gateway Men's Chorus	\$143,498	\$147,879	\$14,996	\$22,266	\$48,363	\$0	\$70,629
Grand Center, Inc.	\$3,438,288	\$3,487,525	\$0	\$5,234,886	\$1,323,752	\$0	\$6,558,638
Historyonics Theatre Co.	\$230,523	\$228,133	\$0	\$33,832	\$0	\$0	\$33,832
Hothouse Theatre Co.	\$115,194	\$101,907	\$0	\$0	\$0	\$0	\$0
Jazz at the Bistro	\$658,336	\$684,994	\$0	-\$8,260	\$29,895	\$0	\$21,635
Kirkwood Theatre Guild	\$106,971	\$89,040	\$0	\$0	\$0	\$0	\$0
Laumeier Sculpture Park	\$1,124,220	\$1,080,796	\$1,784,475	\$316,100	\$2,170,782	\$0	\$2,486,882
Metro Theatre Company	\$581,583	\$626,144	\$0	\$131,760	\$143,499	\$0	\$275,259
Municipal Theatre Association of St. Louis	\$10,104,981	\$9,951,124	\$2,178,853	\$15,043,820	\$777,051	\$0	\$15,820,871
Off The Cuff Productions, Inc.	\$202,682	\$213,228	\$0	\$0	\$0	\$0	\$0
Opera Theatre of Saint Louis	\$6,265,944	\$6,063,076	\$11,493,120	\$407,818	\$1,367,652	\$14,679,502	\$16,454,972
Primo Concerts, Inc.	\$103,484	\$100,653	\$0	\$0	\$0	\$0	\$0
Regional Cultural & Performing Arts Development Commission	\$3,909,235	\$4,443,816	\$0	\$509,596	\$0	\$0	\$509,596
Repertory Theatre of St Louis	\$5,935,143	\$6,254,515	\$6,987,616	\$3,590,742	\$664,514	\$1,517,833	\$5,773,089
Saint Louis Art Fair	\$1,267,421	\$1,264,234	\$0	\$27,333	\$44,265	\$0	\$71,598
Saint Louis Symphony Orchestra	\$26,795,504	\$21,241,620	\$3,998,058	-\$2,040,226	\$11,234,720	\$15,292,061	\$24,486,555
Shakespeare Festival of St. Louis	\$749,807	\$751,072	\$0	\$95,744	\$112,796	\$0	\$208,540
Sheldon Arts Foundation	\$2,295,572	\$2,269,761	\$1,362,382	\$5,087,689	\$1,060,154	\$735,564	\$6,883,407
St Louis Black Repertory Company, Inc.	\$1,485,126	\$1,485,106	\$0	-\$15,875	\$5,000	\$0	-\$10,875
St Louis Cathedral Concerts	\$234,287	\$238,956	\$0	\$6,316	\$0	\$28,016	\$34,332
St Louis Science Center Foundation	\$10,216,822	\$6,348,265	\$0	\$0	\$0	\$0	\$0
St. Louis Childrens Choirs	\$594,726	\$567,077	\$0	\$250,366	\$10,653	\$0	\$261,019
Stages St. Louis	\$2,402,803	\$2,496,926	\$0	\$308,387	\$0	\$52,500	\$360,887
That Uppity Theatre Company	\$148,813	\$134,879	\$1,804	\$122,875	\$0	\$0	\$122,875
The Frank Lloyd Wright House in Ebsworth Park	\$151,608	\$287,555	\$0	\$237,438	\$105,599	\$0	\$343,037
Union Avenue Opera Theater	\$169,014	\$167,822	\$0	\$0	\$0	\$0	\$0
Young Catholic Musicians	\$101,619	\$91,343	\$123,100	\$0	\$0	\$0	\$0
TOTALS	\$92,266,698	\$82,401,225	\$28,018,933	\$31,212,557	\$26,599,489	\$32,492,710	\$90,304,756
AVERAGE	\$2,365,813	\$2,112,852	\$718,434	\$800,322	\$682,038	\$833,146	\$2,315,507
MEDIAN	\$749,807	\$684,994	\$0	\$33,832	\$5,000	\$0	\$122,875

*St. Louis, Missouri*  
**Foundation Giving to the Arts & Culture**

FOUNDATION NAME	ASSETS	GIVING	GIVING TO ARTS AND CULTURE	% OF GIVING TO ARTS AND CULTURE	ASSETS DEVOTED TO ARTS AND CULTURE
Alvin Goldfarb Foundation	\$12,339,522	\$1,813,000	\$17,200	0.95%	\$117,066
Anheuser-Busch Foundation	\$40,311,916	\$16,609,421	\$565,000	3.40%	\$1,371,284
Aronson Foundation	\$3,227,541	\$134,760	\$61,035	45.29%	\$1,461,806
Baer Charitable Foundation, Arthur & Helen	\$8,542,812	\$455,167	\$85,000	18.67%	\$1,595,324
Bodine Charitable Trust, Jack and Mary Jane	\$378,223	\$173,692	\$25,160	14.49%	\$54,787
Boeing-McDonnell Foundation	\$7,985,594	\$4,677,446	\$147,500	3.15%	\$251,820
Bohm Charitable Foundation, Milford and Lee, The	\$6,045,899	\$272,479	\$26,700	9.80%	\$592,433
Brauer Charitable Trust, Stephen F. and Camilla T., The	\$62,078	\$376,398	\$46,500	12.35%	\$46,500 **
Bunge Corporation Foundation	\$85,990	\$479,522	\$90,710	18.92%	\$90,710 **
Cahn Foundation, Paul and Elissa	\$2,422,304	\$181,616	\$72,951	40.17%	\$972,984
Caleb C. and Julia W. Dula Education and Charitable Foundation	\$38,099,007	\$1,835,000	\$453,500	24.71%	\$9,415,749
Duesenberg Foundation, Robert H. and Lorraine F., The	\$3,282,919	\$188,800	\$16,950	8.98%	\$294,732
Edison Family Foundation	\$2,952,703	\$139,500	\$27,500	19.71%	\$582,074
Edison Foundation, Harry	\$11,781,362	\$494,100	\$65,200	13.20%	\$1,554,634
Edison Foundation, Inc., Julian I. & Hope R.	\$7,044,611	\$317,867	\$45,650	14.36%	\$1,011,701
Emerson Charitable Trust*	\$6,858,693	\$19,272,548	\$2,274,161	11.80%	\$2,274,161 **
Enterprise Rent-A-Car Foundation	\$52,777,448	\$8,967,508	\$315,000	3.51%	\$1,853,904
Ever and Anon Foundation	\$2,295,615	\$666,326	\$42,000	6.40%	\$146,902
Fox Family Foundation	\$25,795,680	\$1,251,669	\$131,025	10.47%	\$2,700,298
Gateway Foundation	\$62,904,923	\$1,226,670	\$160,890	13.12%	\$8,250,608
Gaylor Foundation, Catherine Manley, The	\$4,501,390	\$134,771	\$4,000	2.97%	\$133,601
Gaylor Foundation, Clifford Willard	\$8,169,543	\$190,500	\$35,500	18.64%	\$1,522,408
Gershman Charitable Trust	\$1,869,615	\$360,503	\$30,500	8.46%	\$158,177
Gertrude and William A. Bernoudy Foundation	\$14,218,763	\$1,193,420	\$150,000	12.57%	\$1,787,145
Grant Charitable Trust, E. Reuben & Gladys Flora	\$5,872,495	\$235,000	\$65,000	27.66%	\$1,624,307
Greater Saint Louis Community Foundation*	\$7,974,041	\$5,397,526	\$636,908	11.80%	\$940,937
Harris Foundation, Jane and Whitney	\$324,302	\$108,604	\$30,300	27.90%	\$90,479
Hauck Charitable Foundation	\$6,845,836	\$380,220	\$0	0.00%	\$0
Interco Inc. Charitable Trust	\$41,335,626	\$2,021,221	\$203,843	10.09%	\$4,168,756
Jacks Foundation, The	\$2,020,755	\$166,715	\$22,700	13.62%	\$275,147
Kalishman Family Foundation, Jerome and Nancy	\$1,803,470	\$126,900	\$6,000	4.73%	\$85,270
Kellwood Foundation, The*	\$1,990,691	\$610,397	\$72,027	11.80%	\$234,902
Koplar Foundation, Sam & Jeannette	\$486,690	\$326,124	\$10,000	3.07%	\$14,923
Laclede Gas Charitable Trust	\$3,719,280	\$681,217	\$50,000	7.34%	\$272,988
Lay Family Foundation, The	\$15,079,111	\$543,578	\$0	0.00%	\$0
Lemons Charitable Trust, Jean, Jack, & Mildred	\$8,629,496	\$429,305	\$27,300	6.36%	\$548,760
Levy Charitable Foundation, John D. and Sally S.	\$1,461,670	\$138,705	\$54,090	39.00%	\$569,999
Lichtenstein Foundation, David B.	\$15,575,283	\$365,000	\$100,000	27.40%	\$4,267,201
Lieber Foundation, Inc., Clemence S.	\$2,008,580	\$105,000	\$12,000	11.43%	\$229,552
Lopata Foundation, Stanley and Lucy	\$7,887,093	\$419,496	\$17,365	4.14%	\$326,486
Love Charitable Foundation, John Allan	\$3,915,477	\$189,100	\$10,000	5.29%	\$207,059
Mary Ranken Jordan and Ettie A. Jordan Charitable Foundation	\$2,374,055	\$1,116,292	\$322,000	28.85%	\$684,808
Messing Family Charitable Foundation	\$4,842,444	\$305,939	\$5,800	1.90%	\$91,803
Mosanto Fund	\$1,500,427	\$8,336,475	\$776,985	9.32%	\$776,985 **
Pershing Charitable Trust	\$7,120,723	\$359,500	\$75,500	21.00%	\$1,495,451
Pershing Place Foundation	\$7,538,071	\$375,500	\$119,200	31.74%	\$2,392,911
Pillsbury Foundation, Ed and H.	\$6,380,737	\$449,060	\$6,250	1.39%	\$88,807
Pillsbury Foundation, Fred	\$7,804,988	\$296,627	\$1,000	0.34%	\$26,312
PMJ Foundation	\$1,088,547	\$238,610	\$1,900	0.80%	\$8,668
Pulitzer Foundation	\$592,185	\$115,040	\$41,000	35.64%	\$211,053
Sayler-Hawkins Foundation	\$3,650,333	\$227,250	\$10,000	4.40%	\$160,631
Shoenberg Foundation, Inc.	\$4,232,993	\$233,500	\$31,000	13.28%	\$561,982
Simmons Charitable Foundation	\$5,312,142	\$156,500	\$25,500	16.29%	\$865,557
Sitman Family Foundation, The	\$2,392,043	\$104,400	\$31,000	29.69%	\$710,281
Solutia Fund	\$233,721	\$613,029	\$1,500	0.24%	\$1,500 **
Swift Company Charitable Trust, Inc., John S.	\$2,007,030	\$99,625	\$5,600	5.62%	\$112,817
The Bellwether Foundation, Inc.	\$17,542,315	\$820,000	\$460,000	56.10%	\$9,840,811
The G.A., Jr. and Kathryn M. Buder Charitable Foundation	\$16,641,449	\$987,020	\$46,300	4.69%	\$780,632
The May Department Stores Company Foundation, Inc.	\$24,321,438	\$15,509,216	\$2,326,924	15.00%	\$3,649,065
The Richard W. and Phyllis B. Duesenberg Foundation	\$14,639,870	\$679,000	\$55,500	8.17%	\$1,196,631
Trio Foundation of St. Louis	\$10,945,021	\$749,400	\$186,000	24.82%	\$2,716,538
University Lane Foundation	\$3,131,879	\$297,000	\$77,500	26.09%	\$817,241
Wampus Beth Zion Trust, The	\$1,955,339	\$192,311	\$12,500	6.50%	\$127,095
Ware Family Foundation, E. Coulter, The	\$424,712	\$150,000	\$50,000	33.33%	\$141,571
Whitaker Foundation	\$23,679,145	\$1,457,267	\$718,467	49.30%	\$11,674,377
Zimring Family Foundation, The	\$16,584	\$124,821	\$15,253	12.22%	\$2,027
St. Louis Art Museum Foundation	\$21,946,159	\$932,000	\$932,000	100.00%	\$21,946,159
St. Louis Symphony Endowment Trust	\$55,627,496	\$4,063,941	\$4,063,941	100.00%	\$55,627,496
TOTALS	\$698,825,893	\$112,636,114	\$16,605,785	14.74%	\$168,806,782
AVERAGE	\$10,276,851	\$1,656,413	\$244,203	14.74%	\$2,482,453
MEDIAN	\$5,592,319	\$375,949	\$46,400	12.34%	\$576,037

\*Giving to the arts calculated at 11.8% of Total Giving

\*\*ACH Assets calculated as Giving x % of Giving

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