

Endowment Tme Series for Report

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Definitions:

- OtherExpendituresAmt: Other expenditures for facilities and programs

Table 1: Organizations with 100% of their Endowments in One Category for All Years on File

| Endowment Type | Organization Name | Number of Years on File |
|--------------------------------------------|------------------------------------------------------------------|-------------------------|
| Board designated or quasi-endowment | | |
| Board designated or quasi-endowment | Pittsburgh Ballet Theatre | 7 |
| Board designated or quasi-endowment | Dance Theatre of Harlem, The Tallahassee Ballet | 6 |
| Board designated or quasi-endowment | Ballet Quad Cities | 2 |
| Board designated or quasi-endowment | Canyon Concert Ballet | 1 |
| Permanent endowment | | |
| Permanent endowment | Pittsburgh Ballet Theatre | 7 |
| Permanent endowment | Dance Theatre of Harlem, Madison Ballet | 6 |
| Permanent endowment | BalletMet | 5 |
| Permanent endowment | Aspen Santa Fe Ballet, Ballet West | 4 |
| Permanent endowment | New Mexico Ballet Company | 3 |
| Permanent endowment | Oregon Ballet Theatre | 2 |
| Permanent endowment | American Repertory Ballet, Colorado Ballet, Orlando Ballet | 1 |
| Temporarily restricted endowment | | |
| Temporarily restricted endowment | Pittsburgh Ballet Theatre | 7 |
| Temporarily restricted endowment | Dance Theatre of Harlem, First State Ballet Theatre | 6 |
| Temporarily restricted endowment | Ballet Des Moines | 2 |

Where Endowments are Held

Types of Endowments by Organization

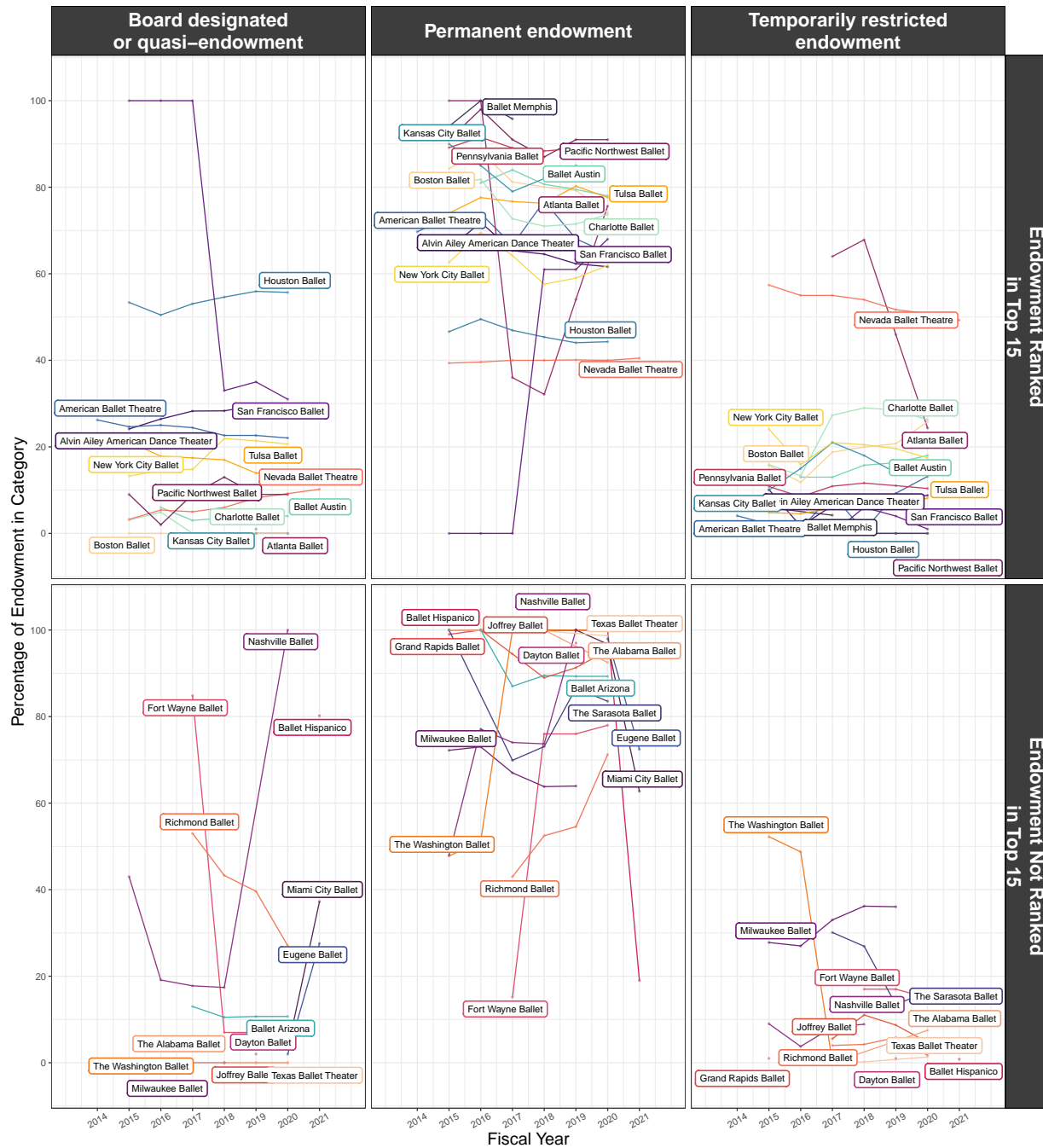


Figure 1: The percentage of endowments held in temporarily restricted endowment, permanent endowment, or board designated or quasi-endowment. The first row of plots corresponds to the percentages for companies ranked in the top 15 by beginning of year balance, and the second row includes all remaining companies.

Rankings

Beginning of Year Balance versus Contributions

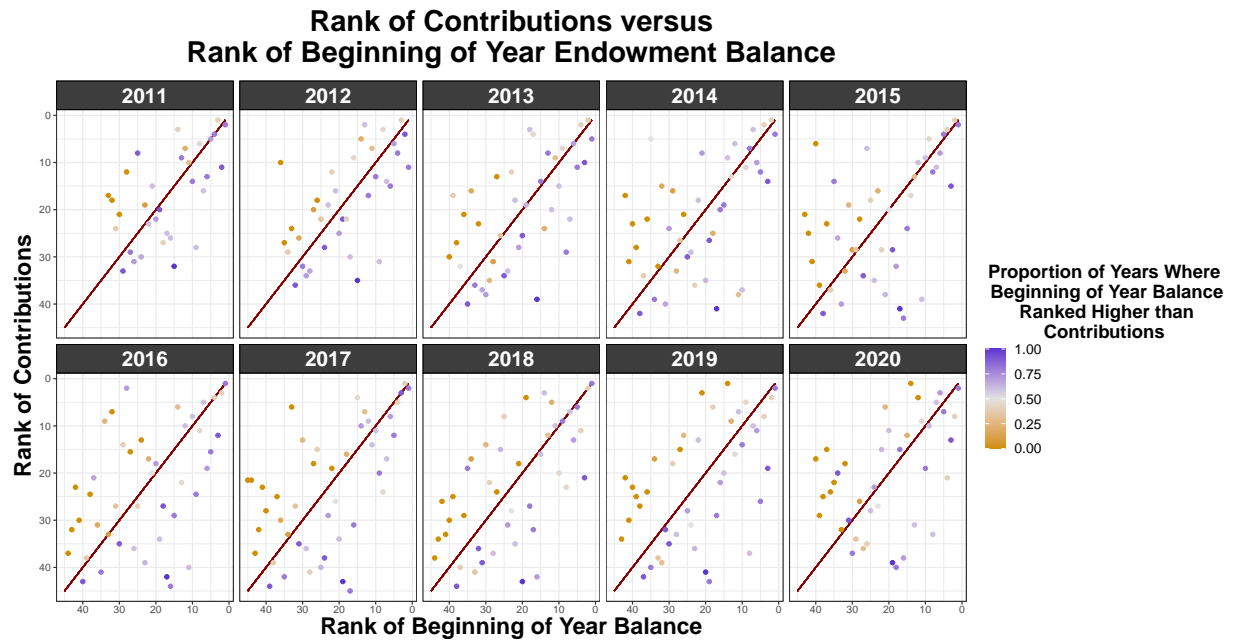


Figure 2: Comparing the rankings of beginning of year balance of the endowment to the ranking of contributions recieved.

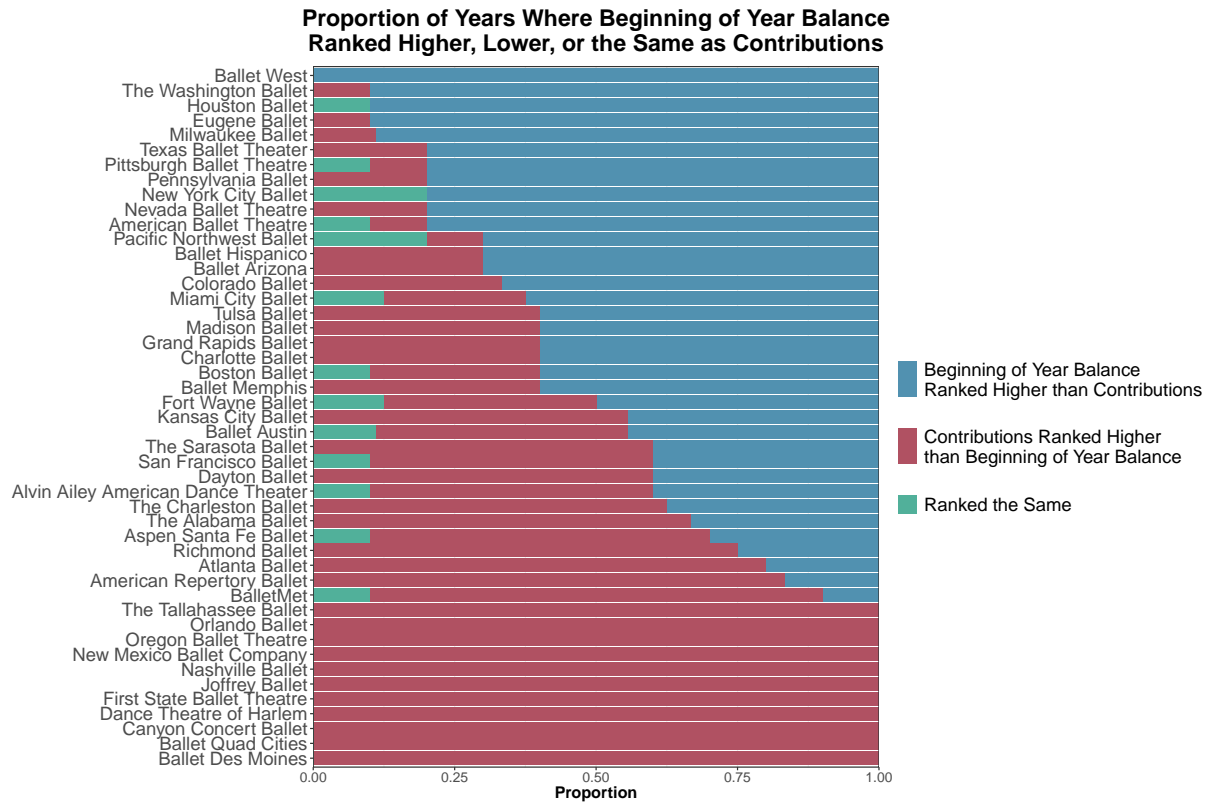
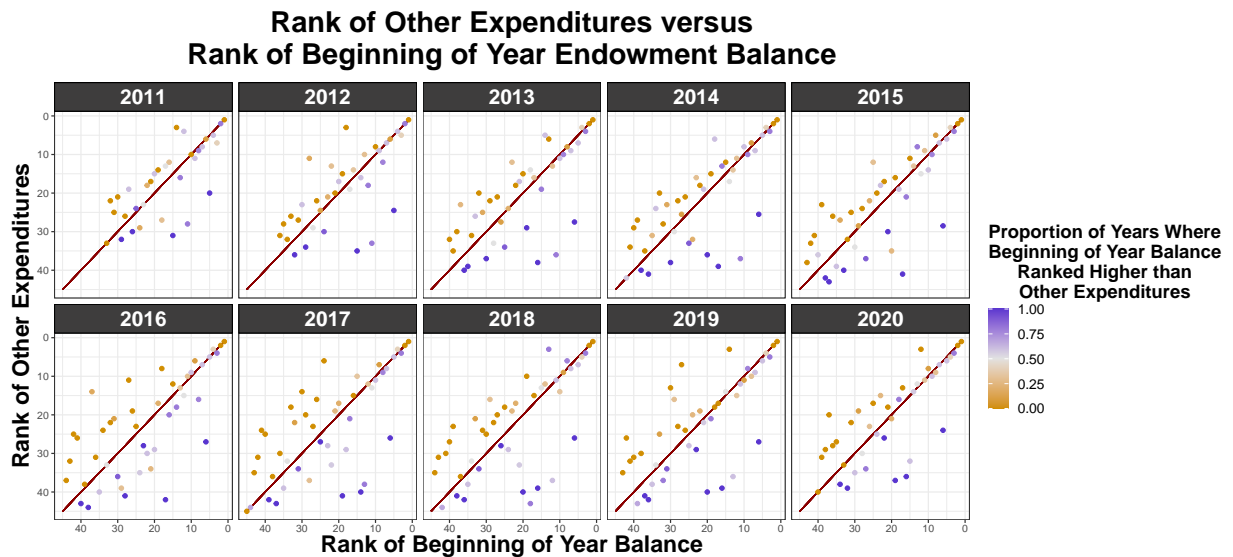


Figure 3: Comparing the Proportion of years where a company ranked higher, lower, or the same in beginning of year balance compared to contributions received.

Beginning of Year Balance versus Other Expenditures



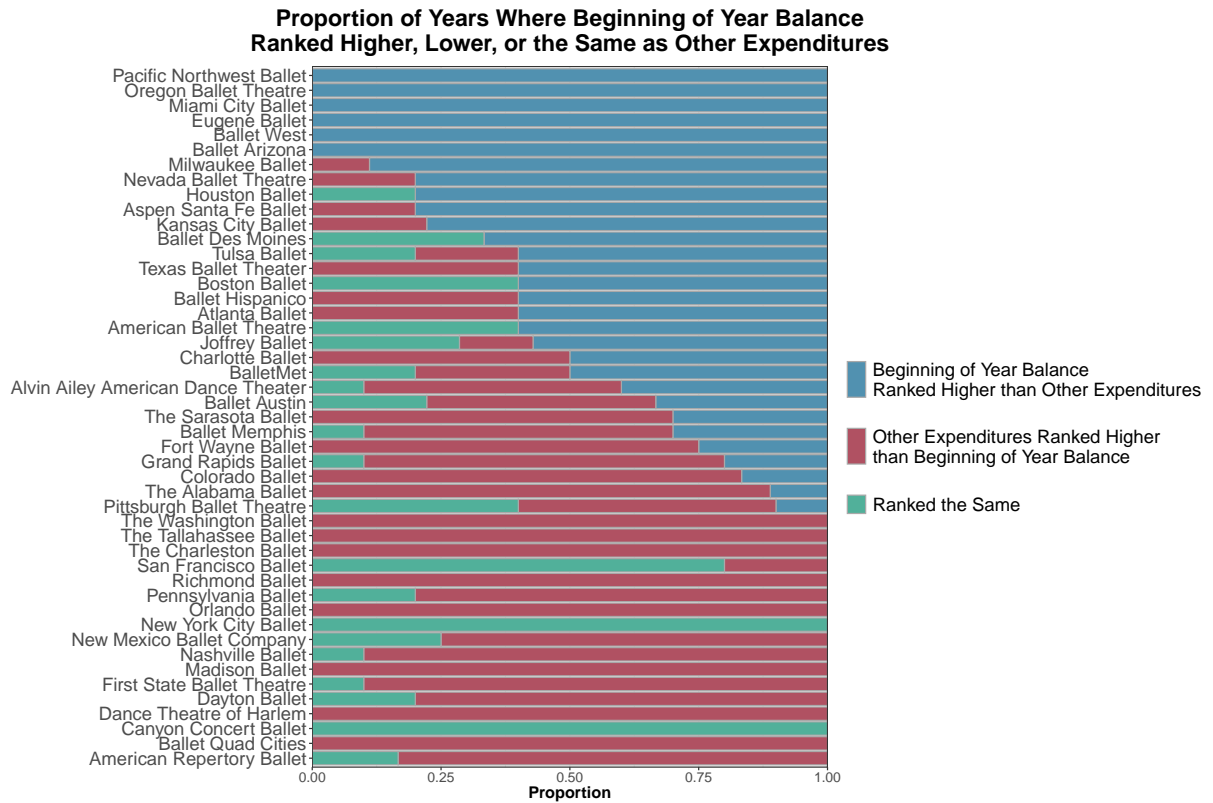


Figure 4: Comparing the proportion of years where a company ranked higher, lower, or the same in beginning of year balance compared to expenditures.

How ranks change over time

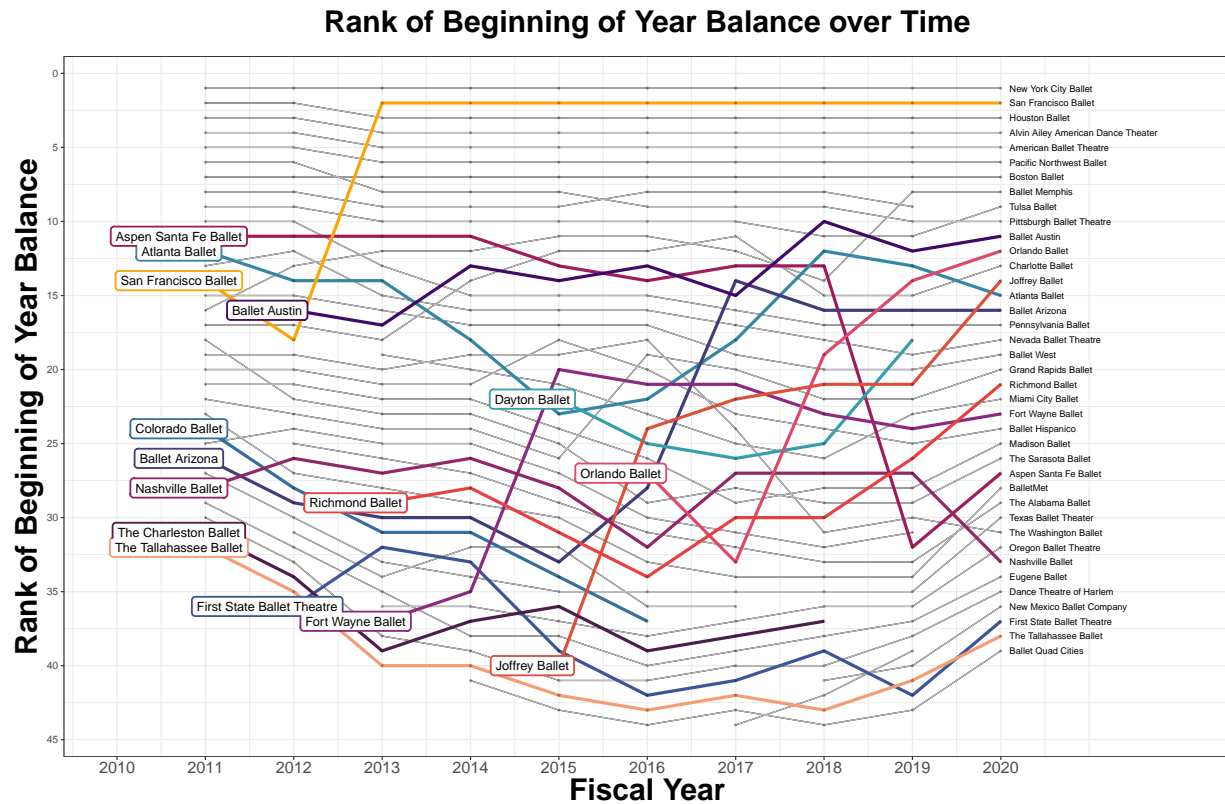


Figure 5: Rank of the endowment beginning of year balance over time. The 15 companies with the most variability in ranking, defined as the mean difference in rankings between fiscal years, are shown in color. Names of all companies are on the right.

```
## # A tibble: 46 x 4
## # Groups:   organization_name [46]
##   organization_name      min    max difference
##   <chr>                <dbl> <dbl>      <dbl>
## 1 Joffrey Ballet        40     14        -26
## 2 Aspen Santa Fe Ballet  11     27         16
## 3 Orlando Ballet        27     12        -15
## 4 Fort Wayne Ballet     37     23        -14
## 5 Colorado Ballet       24     37         13
## 6 The Washington Ballet  19     31         12
## 7 San Francisco Ballet  14      2         -12
## 8 Ballet Arizona        26     16        -10
## 9 Ballet Memphis        16      8          -8
## 10 The Sarasota Ballet   18     26          8
## # i 36 more rows
```