



Ford Foundation records, Arts and Humanities Program Files, Marcia T. Thompson

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Summary Information

| | |
|----------------------------------|---|
| Repository: | Rockefeller Archive Center |
| Creator - aut: | Thompson, Marcia |
| Creator: | Ford Foundation |
| Title: | Ford Foundation records, Arts and Humanities Program Files, Marcia T. Thompson |
| ID: | FA1482 |
| Date [inclusive]: | 1954-1999 |
| Physical Description: | 22.3 Cubic Feet 56 boxes total (45 letter document containers and 11 legal document containers) |
| Language of the Material: | English . |

Preferred Citation

Information regarding the Rockefeller Archive Center's preferred elements and forms of citation can be found at <https://rockarch.org/collections/access-and-request-materials/#citations>

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Biographical / Historical

Marcia Aldrich Thompson Thompson (1923-2018) was an advocate for financial stabilization projects in the arts throughout her long career with the Ford Foundation, the National Arts Stabilization Fund, and as a board member for many arts organizations. She was born on Oct. 2, 1923 in Hankow, China. Thompson attended the Columbia University School of General Studies, the New School for Social Research, and earned a certificate from Katherine Gibbs School. She started her career at the New York Times as the Assistant to the Sunday Editor from 1946-1951. She moved on to hold multiple positions at the International Press Institute as Assistant to the Chairman and Associate Director, Conference Coordinator until 1953. In 1955, she married Ralph Thompson, a book critic and columnist for the New York Times, and secretary of the Book of the Month Club.

In 1953, Thompson joined the Ford Foundation as a program officer. From the beginning, she was involved in the formation and development of the Foundation's program in humanities and the arts. She had a hand in all major subsequent initiatives through 1983, including the development of programs for individual artists as well as institutional development in the arts. She worked to create incentives for

symphonies, ballet companies, theaters and other arts groups to liquidate their deficits and build working capital reserves. Some of her achievements include: providing \$80.2 million in grants to orchestras across the country as part of the Symphony Orchestra Program, providing support for development of dance companies and professional training in classical dance, and developing the Program for Administrative Interns, the Program for Curatorial Training, and the Program for Catalogues of American Fine Arts Collections. She also led the Ford Foundation Cash Reserve Program from which the National Arts Stabilization Fund eventually evolved. She collaborated closely with Ford Foundation executive William W. McPeak and Vice President W. McNeil Lowry. Lowry and Thompson's partnership helped Ford become the country's largest nongovernmental arts patron and the first to support dance. By 1967, Thompson was the Ford Foundation's senior program officer in the arts and humanities.

Thompson left the Ford Foundation to found and serve as president of the National Arts Stabilization Fund (NASF) in December 1983. The NASF was created with funding from the Ford Foundation, the Andrew W. Mellon Foundation, and the Rockefeller Foundation, to provide arts institutions with grants and fiscal management strategies. Thompson was responsible for all aspects of the NASF's operations including development of principles and policies, fundraising, project development and oversight, administration, planning, board relations and external affairs until 1991. She served as Chairman of the Executive Committee and Vice Chairman of the NASF from 1991-1993. Thompson was also a board member of the School of American Ballet, Theater for a New Audience and the Scherman Foundation. Marcia Thompson died in March 2018.

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Scope and Contents

The collection contains the office files of Marcia T. Thompson, program officer in the Office of the Humanities and the Arts at the Ford Foundation from 1953-1983. Contents include background papers, reports, correspondence, grant files, and materials relating to the Symphony Orchestra Program, the Cash Reserve Program, the Ford Foundation Stabilization Program, the Office of the Humanities and the Arts, the Education and Culture Program, and the National Arts Stabilization Fund (NASF).

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Arrangement

This collection is arranged into eight series:

1. Grants and Administrative Files, 1954-1999
2. Symphony Orchestra Program (SOP), 1953-1988

3. Cash Reserve Program, 1965-1987
4. National Arts Stabilization Fund (NASF), 1970-1994
5. Ford Foundation Board of Trustees, 1955-1992
6. Humanities and the Arts Program Files, 1953-1986
7. Ford Foundation Stabilization Program, 1971-1993
8. Education and Culture Program, 1956-1985

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Administrative Information

Publication Statement

Rockefeller Archive Center

15 Dayton Avenue

Sleepy Hollow 10591

archive@rockarch.org

URL: <http://www.rockarch.org>

Immediate Source of Acquisition

Ford Foundation records, correspondence, reports, program files and officers papers were transferred to, and accessioned by the RAC beginning in 2011. Accessions continue as necessary. This material was transferred to the RAC in 2018 by the Ford Foundation and was ingested by the RAC as Accession 2018:131.

Conditions Governing Access

Open for research with select materials restricted as noted. Brittle or damaged items are available at the discretion of RAC.

Processing Information

Standard processing by Katie Martin, January 2019.

Conditions Governing Use

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Related Materials

Related Materials

Marcia T. Thompson papers (FA1489) <http://dimes.rockarch.org/FA1489/collection>

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Controlled Access Headings

- Ford Foundation
- Humanities -- United States
- Program development -- Arts -- Ford Foundation
- Symphony orchestras -- United States

Collection Inventory

Grants and Administrative Files, 1954-1999

Scope and Contents

Correspondence, memos, reports, news clippings, office files, and grant materials

| Title/Description | Instances | |
|---|-----------|----------|
| Center for Applied Linguistics FY1967 - FY1970, 1970 November | box 1 | folder 1 |
| Grant Making: A Study of the Process for Reaching Decisions on Grants, A Report to the President of the Ford Foundation, 1973 November 19 | box 1 | folder 2 |

Scope and Contents

Mary Brucker, Merrimon Cuninggim, Advisors

| | | |
|---|-------|-----------|
| News from the Ford Foundation, 1977 May 11 | box 1 | folder 3 |
| Interoffice Memos Regarding Report on Grant Decision-Making, 1973 November-December | box 1 | folder 4 |
| Economic and Social Positions of the Artist and His Institutions, Phase I: Descriptive and Statistical, 1958 April 8 | box 1 | folder 5 |
| Scope and Contents | | |
| Section 1: The Visual Arts | | |
| Section 2: Music | | |
| Section 3: The Theatre Arts | | |
| Section 4: The Dance | | |
| Section 5: Creative Writing Other Than Dramatic | | |
| Modern Dance Companies with Expense Budgets of \$500,000 or Less in 1970-71, 1973 March 12 | box 1 | folder 6 |
| Evaluation Study: The Ford Foundation Program for Administrative Interns, 1974 September 10 | box 1 | folder 7 |
| Outlines - Local Letter Agreement Binder, Charitable Giving Statistics and Trends, Operating Statistics in the Arts, 1994 January | box 1 | folder 8 |
| The Ford Foundation and "Dependent" Organizations - 1971/ Covers of Ford Internal Information Papers, 1967-1983 | box 1 | folder 9 |
| Financial Planning Priorities, 1983-1985 | box 1 | folder 10 |

Scope and Contents

Joffrey Ballet - 1983

Theatre Communications Group - 1983

The Feld Ballet - 1983

Lyric Opera of Chicago - 1984

School of the American Ballet - 1985

Principles and Policies List

| | | |
|---|-------|-----------|
| Does Industry Need Art Schools?, 1969 June 24 | box 1 | folder 11 |
|---|-------|-----------|

Scope and Contents

Attachment of Rob Roy Kelly's letter of 6/24/69

| | | |
|---|--------|--------------|
| Action - Interoffice Memos, 1976-1991 | box 1 | folder 12 |
| Interoffice Memos Regarding Personnel, 1971-1983 | box 55 | folder 455 |
| <u>Conditions Governing Access:</u> | | |
| Conditions Governing Access | | |
| Sensitive Material | | |
| Leonard R. Vignola (3 folders), 1972-1991 | box 1 | folder 13 |
| Scope and Contents | box 2 | folder 14-15 |
| Memos and correspondence | | |
| Boston Project - 1985 Announcement, Awards, Letters of Comment (2 folders), 1985 | box 2 | folder 16-17 |
| Scope and Contents | | |
| Includes: | | |
| Press Release | | |
| Coverage Release | | |
| Letters of Comment | | |
| Worthy of Note (newspaper clippings), 1972-1988 | box 2 | folder 18 |
| Literary Classics, Library of America, 1971-1983 | box 2 | folder 19 |
| Thompson, Ralph, 1964-1976 | box 2 | folder 20 |
| Scope and Contents | | |
| National Translation Center | | |
| Lowry, W. McNeil (2 folders), 1965-1975 | box 2 | folder 21-22 |
| Grants, Program Officer Marcia Thompson, 2013 December 11 | box 2 | folder 23 |
| Scope and Contents | | |
| List from the Rockefeller Archive Center | | |
| Marcia T. Thompson - Ford Foundation Oral History Agreement and Transcripts, 1974 August 16 | box 2 | folder 24 |
| Marcia Thompson - Research and Questionnaires, 1981 January | box 2 | folder 25 |

Scope and Contents

Also includes research printouts from the Rockefeller Archive Center

| | | |
|--|-------|-----------|
| Policy on Rotation of Senior Foundation Officers, 1973 April 11 | box 2 | folder 26 |
| Alternative Futures: Challenging Designs for Arts Philanthropy, A Series of Conference Papers Exploring Arts and Philanthropy in the United States Today, Commissioned by Grantmakers in the Arts, undated | box 2 | folder 27 |
| Leverage Lost: The Nonprofit Arts in the Post-Ford Era, John Kreidler, 1995 December | box 2 | folder 28 |
| Miscellaneous Documents, 1985-1999 | box 2 | folder 29 |

Scope and Contents

Index to W. McNeil Lowry Speeches, Articles, Congressional Testimonies, Etc.

List of appearances in articles, at conferences, as an awardee

W. McNeil Lowry papers (from the University of Illinois Archives) finding aid printout

Letters from Talton F. Ray

| | | |
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| M. Thompson's Rolodex - Business Cards, Cards from Richmond AAM Meeting (2 folders), 1986 October | box 3 | folder 30-31 |
| Materials for Marcia Thompson Visit, 1980-1990 | box 3 | folder 32 |

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Visit to the Rockefeller Archive Center

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| School of American Ballet - Grant Report, 1969-1984 | box 3 | folder 33 |
| Letters to Save, 1991-2014 | box 3 | folder 34 |
| Blumenfeld, Helaine, 1982-1988 | box 3 | folder 35 |

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Art catalogs

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| Opera, 1978-1990 | box 3 | folder 36 |
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Correspondence and 1989-90 Season's Projection Per Opera America (Profile 1989)

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| Museums, 1985-1989 | box 3 | folder 37 |
| Theaters, 1984-1986 | box 4 | folder 38 |

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| Foundation for Hellenic Culture, 1993 | box 4 | folder 39 |
| San Francisco Symphony Association to Honor the Generosity of the Ford Foundation - Dinner, 1967 May 9 | box 4 | folder 40 |

Scope and Contents

Includes remarks, programs, newspaper clippings, and photographs

| | | |
|--|-------|--------------|
| Noteworthy Correspondence (2 folders), 1978-1979 | box 4 | folder 41-42 |
| Literary Classics - Poetry and Small Press Publications (3 folders), 1978-1979 | box 4 | folder 43-45 |
| Background Papers for Common Fund Meeting, 1966-1973 | box 5 | folder 46 |

Scope and Contents

Contents:

1. Press Release of 7/6/66 - 10-year grant \$80.2 million Symphony Orchestra Program
2. Terms of Grant
3. Trust Agreement
4. Summary of Matching Achieved as of 6/30/71
5. Letter of 6/1/72
6. Letter of 9/1/72
7. Letter of 8/1/73
8. Statistics Fiscal 1971
9. Statistics Fiscal 1972
10. Annual Internal Review Form

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|---|-------|--------------|
| National Endowment for the Arts (NEA), 1976-1977 | box 5 | folder 47 |
| Washington, DC - Consortium, 1978-1979 | box 5 | folder 48 |
| Theater Directors Program, 1977-1978 | box 5 | folder 49 |
| Juilliard School: Drama Division (2 folders), 1978 | box 5 | folder 50-51 |
| Mellon - Debt Reduction Analysis - Orchestras, 1972-1977 | box 5 | folder 52 |
| National Symphony Orchestra, 1972-1977 | box 5 | folder 53 |
| The Ford Foundation Ballet Development - FY 1959-1971, 1980 May | box 5 | folder 54 |
| New York City Opera Grant of \$2.6 Million, 1979 | box 5 | folder 55 |

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| New American Theater Development, 1978-1982 | box 5 | folder 56 |
| Broadway Theaters FY 1970-1977, 1970-1977 | box 5 | folder 57 |
| The Ford Foundation Program for Catalogues of Fine Arts Collections (2 folders), 1977 September 30 | box 6 | folder 58-59 |
| Patronage and Pluralism, 1977 January-April | box 6 | folder 60 |
| Mellon Drafts FY 1976-1984, 1976-1984 | box 6 | folder 61 |
| Opera Forms, 1974 | box 6 | folder 62 |
| Memorandum for the Officers from McGeorge Bundy, 1976-1977 | box 6 | folder 63 |
| Mailing Lists, 1988 | box 6 | folder 64 |
| Ford Foundation Information (General), 1966-1977 | box 6 | folder 65 |
| Internal Memos (2 folders), 1982-1993 | box 6 | folder 66-67 |
| Filmmakers, 1963-1976 | box 6 | folder 68 |
| Marcia T. Thompson (MTT) Chrons, 1970-1971 | box 6 | folder 69 |
| Marcia T. Thompson (MTT) Chrons, 1983 September 1-October 31 | box 7 | folder 70 |
| Ruder and Finn/Public Interest Public Relations Firm (PIPRF) - Temporary File, 1973-1976 | box 7 | folder 71 |
| Economic and Financial Survey - Case Histories, 1974 | box 7 | folder 72 |
| Economic and Financial Survey, Draft - Historical Introduction, 1974 | box 7 | folder 73 |
| Lucille Graham - Job Description Program, 1956 March 30 | box 7 | folder 74 |
| Administrative Interns - Reports (3 folders), 1973-1974 | box 7 | folder 75-77 |
| Museums (2 folders), 1968-1976 | box 7 | folder 78 |
| Scope and Contents | box 8 | folder 79 |
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| Greek Grants and Notes, 1972-1975 | box 8 | folder 80 |
| Background/Theater, 1959-1976 | box 8 | folder 81 |
| School of American Ballet - Evaluation, 1963-1973 | box 8 | folder 82 |
| Best Practices, Examples of, 1967-1968 | box 8 | folder 83 |
| Scope and Contents | | |
| Notes and memos | | |
| Zeisler, Peter, 1972-1981 | box 8 | folder 84 |
| Theater - Resident Professional/League of Resident Theatres (LORT) Companies, 1967-1978 | box 8 | folder 85 |

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| Useful Articles, 1963-1970 | box 8 | folder 86 |
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Scope and Contents

Moving the Rough Road to Home: Reports from readers
help you take the bumps; they shed light on 14 van lines

Arts Management - Lawyers Form New Organization to Aid
and Counsel the Arts

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| Cunningim, Merrimon Reports, 1973-1974 | box 8 | folder 87 |
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| New York Public Library L68-303, 1967-1972 | box 8 | folder 88 |
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| Fellowships and Awards, 1958-1960 | box 8 | folder 89 |
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| Notes on the Principles and Policies of the Ford Foundation - Drafts, 1954 | box 8 | folder 90 |
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| California Giving - The Scherman Foundation, Inc. (3 folders), 1971-1984 | box 8 | folder 91-93 |
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| Theater Communications Group (2 folders), 1970-1972 | box 9 | folder 94-95 |
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Scope and Contents

Sections include:

Rank Order List of Theaters by Number of Actos Seen

Actors Equity

Administrative Interns

Arts Councils

Ballet Development

Catalogues

Cultural Activities

Foundations

Museum Curatorial Training

National Endowment for the Arts

National Endowment for the Humanities

N.Y. State Council on the Arts

New York City Ballet

State Arts Agencies

Statistics/FF

Statistics/ H/A

Tamarind

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|--|-------|--------------|
| Consultants - Trip Reports/Theater Production Reports (2 folders), 1971-1975 | box 9 | folder 96-97 |
| Talks by Mercedes Matter - Training the Professional Artist, On Drawing, On Curriculum, 1967 November 22 | box 9 | folder 98 |
| The Ford Foundation and "Dependent" Organizations: An Information Paper for Discussion by the Trustees at the September 1971 Meeting, 1971 September | box 9 | folder 99 |
| Roger Kennedy - To Members of the Arts Committee, 1977 | box 9 | folder 100 |

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Memos and Correspondence

Theater Reawakening: A Report on Ford Foundation Assistance to American Drama

The Arts in June

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| Roger Kennedy Correspondence, 1977-1979 | box 9 | folder 101 |
| Ford Foundation Building, 1967 | box 10 | folder 102 |
| Kendall, Elizabeth - Correspondence, Chronological Order, 1975-1979 | box 10 | folder 103 |
| Kendall, Elizabeth - Parts of Manuscripts, 1977-1978 | box 10 | folder 104 |
| Guarnieri, Luciano - Triple Portrait, 1971-1972 | box 10 | folder 105 |
| Thompson, Franklin A., 1974-1980 | box 10 | folder 106 |
| Correspondence A-Z (4 folders), 1979 | box 10 | folder 107-108 |
| | box 11 | folder 109-110 |
| Roger Kennedy's Correspondence L-Z (2 folders), 1977-1978 | box 11 | folder 111-112 |
| Theater Communications Group (TCG) vs. Ford Foundation vs. Stabilization, 1981 | box 12 | folder 113 |
| Franklin A. Thomas - Clippings and Press Releases, 1980-1982 | box 12 | folder 114 |
| O/A Statistics/Theater, 1957-1972 | box 12 | folder 115 |
| Rueppel Memoranda, 1970-1972 | box 12 | folder 116 |

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Cantor Appt. Letter

Cantor Report

Letter Rueppel

Rueppel Analysis and Tables

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| Interoffice Memoranda (2 folders), 1961-1982 | box 12 | folder 117-118 |
| Ford Foundation Task Force - Affirmative Action, 1972-1980 | box 12 | folder 119 |
| Ford Foundation Policy and Procedures: Dependent Organizations, 1971 | box 12 | folder 120 |
| Proposed Budget and Program for FY 1980-1981, 1979 | box 12 | folder 121 |
| Marcia Thompson Chrons (2 folders), 1983 January 1-February 28 | box 13 | folder 122-123 |
| Marcia Thompson Chrons, 1983 May 1-August 31 | box 13 | folder 124 |
| Marcia Thompson Chrons, 1983 November 1-December 31 | box 13 | folder 125 |
| Endowment Funds - Barker Reports, Lore of, etc., 1972-1977 | box 13 | folder 126 |
| Catalogues Program: Status of Grants, 1981 | box 13 | folder 127 |
| Newman, Danny (2 folders), 1976-1981 | box 13 | folder 128-129 |
| Vienna Opera, Temporary File, 1973 | box 13 | folder 130 |
| Kapp, Richard G. Memoranda, 1969-1971 | box 14 | folder 131 |
| Opera Theatre of St. Louis - 1982 Analysis, 1981-1982 | box 14 | folder 132 |
| Whither the Arts? Principles, Policies, and Observations (2 folders), 1974-1983 | box 14 | folder 133-134 |

Scope and Contents

Includes memos, notes, and correspondence from theater representatives (many letters from/involving Daniel Newman)

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| Gertrude Hooker Memo, 1963 February | box 55 | folder 456 |
| <u>Conditions Governing Access:</u> Conditions Governing Access | | |
| Confidential | | |
| Verne Atwater Memo - Personnel Policies, 1966 January 27 | box 14 | folder 135 |

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| Ford Foundation Oral History Project - Interview with Marcia Thompson - Edited Transcript and Correspondence, 1973-1975 | box 14 | folder 136 |
| Pennsylvania Ballet - Memos and Financial Information, 1976-1980 | box 14 | folder 137 |
| San Francisco Foundation - Buck Trust Suit, 1988-1992 | box 14 | folder 138 |
| Correspondence and Mailing List (2 folders), 1985-1993 | box 14 | folder 139-140 |
| American Symphony Orchestra League - Comparative Statistical Report, 1989-1990 Season, Orchestras With Expenses Over \$4,700,000, 1990 November | box 15 | folder 141 |
| American Symphony Orchestra League - 1989-1990 Season - Labor Contract Survey - Orchestras With Expenses Over \$2,400,000, 1989-1990 | box 15 | folder 142 |
| Horizon, Volume IV, Number 3 - "Ford Moves in on the Arts, p. 4", 1962 January | box 15 | folder 143 |
| Ford Foundation Directives and Terms of Reference for the 1960s, 1962 June | box 15 | folder 144 |
| Ford Catalogues Program Evaluations Published by Museums of Fine Arts (2 folders), 1971-1983 | box 15 | folder 145-146 |
| Letters of Grant - Other (2 folders), 1974-1979 | box 15 | folder 147 |
| | box 16 | folder 148 |
| 1. Annexes, 1975 June 19 | box 16 | folder 149 |

Scope and Contents

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Organisation of Cultural Activities in France

Theatres and Symphony Orchestras in West Germany

Radio and Television

Theatres and Symphony Orchestras in Austria

Great Britain: Official aid to Cultural Activities

Cultural Activities in the Scandinavian Countries

Official Theatres in Brussels

Theatres in Switzerland

Italy: Opera Houses

Theatre and Music in Spain

Theatre and Symphony orchestras in Portugal

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| 2. Federal Germany (starts with), 1975 June 19 | box 16 | folder 150 |
| 3. Scandinavian Countries (starts with), 1975 June 19 | box 16 | folder 151 |
| 1. Theatre and Music in Western and Northern Europe, 1960-1972, Subsidies - Administration, Life and Working Conditions of Creative and Performing Artists, Ruby D'Arschot, 1975 June 19 | box 16 | folder 152 |

Scope and Contents

Introduction

The Promotion of theatre and music in France

Opera and Ballet in Paris

Symphony Orchestras

Theatres and Symphony orchestras in Vienna

Theatre, Opera, Ballet, and Symphony orchestras in Great Britain

Symphony Orchestras in London

Theatres and Symphony Orchestras in Scandinavia

Orchestras in the Scandinavian Countries

Theatres and Symphony Orchestras in Amsterdam

Radio and Television

Theatre and Opera in Brussels

Theatre and Symphony orchestras in Switzerland

Theatre and Symphony orchestra in Italy

Theatre and Music in Spain and Portugal

The Performing Artist

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| 2. Great Britain (starts with), 1975 June 19 | box 17 | folder 153 |
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Symphony Orchestra Program (SOP), 1953-1988

Biographical / Historical

From 1966 to 1976, the Ford Foundation contributed over \$80 million to 61 symphony orchestras in the United States and Puerto Rico, with dual missions of improving the financial conditions of North American orchestral musicians and strengthening perceptions of American culture in Europe and Asia. The program raised musicians' salaries and helped orchestras develop new fundraising mechanisms.

| Title/Description | Instances | |
|---|-----------|----------------|
| Symphony Orchestra Program (SOP) - Annual Review Memos (2 folders), 1966-1985 | box 17 | folder 154-155 |
| Symphony Orchestra Program (SOP) - Program Information, 1965-1966 | box 17 | folder 156 |

Scope and Contents

Sections include:

Grants - Listing

Program Papers (Listing)

Funds - Definitions

Terms of Grant - Dev.

Press Release - Oct. 22, 1965

Press Release - July 6, 1966

American Symphony Orchestra League Speech -- EFD

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|---|--------|----------------|
| Symphony Orchestras: Memos and Programs (2 folders), 1961-1982 | box 17 | folder 157-158 |
| Symphony Orchestra Program - Clippings, Memos Related to Individual Orchestras, Notes Related to Grants, Budget Analysis (5 folders), 1964-1975 | box 18 | folder 159-163 |

Scope and Contents

Also includes Questionnaires for Orchestras, The Symphony Orchestra Abroad: A Report of a Study, Howard Taubman

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| Symphony Orchestra Program - Ranked by Size of Endowment Funds, 1970-1973 | box 18 | folder 164 |
| Tickler for Symphony Orchestra Program, 1965-1982 | box 18 | folder 165 |
| Symphony Program General Information - News Clippings, Memos, Press Releases, 1965-1966 | box 18 | folder 166 |
| Symphony Program - News Release and Attachments, 1965 October 22 | box 19 | folder 167 |

Scope and Contents

From folder - Editor's Note: This folder contains the announcement of a major program for American symphony orchestras, together with background material.

Contents:

-- News Release

-- Attachment I: Background

-- Attachment II: American Symphony Orchestra League Lists

-- Attachment III: Previous Ford Foundation Activities in Music

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| Symphony Orchestra Program - Developmental Funds Report, 1972-1973 | box 19 | folder 168 |
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Scope and Contents

Memos and budget information related to individual symphonies

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| Symphony Orchestra Program - Materials, 1966-1973 | box 19 | folder 169 |
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Ford Foundation Letter - Special Report: Symphonic Strains (Financial)

Agreement Between The Ford Foundation and the Bank of New York

News Release

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| Symphony Orchestra Program - Running Statistics (3 folders), 1972-1980 | box 19 | folder 170-172 |
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| Symphony Orchestras' Data Analysis, 1976-1985 | box 19 | folder 173 |
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Scope and Contents

Includes:

Ford National Program for Symphony Orchestras: A Final Report, 1966-1976

Memos regarding endowment principal

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| Mellon/Symphony Orchestras - National Arts Stabilization Fund, 1966-1988 | box 19 | folder 174 |
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| Symphony Orchestras - Ford, Mellon, and Findings, 1976-1982 | box 19 | folder 175 |
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| Symphony Orchestra Program - Trust Distribution and Control Sheets, 1975-1976 | box 19 | folder 176 |
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Scope and Contents

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Orchestras and Proportion Shares

Control Sheets

Instructions Distribution of Trust

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| Symphony Orchestra Program - Endowment Funds Report, 1972-1976 | box 19 | folder 177 |
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Scope and Contents

New York Philharmonic

The Philadelphia Orchestra

San Francisco Symphony Orchestra

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Shreveport Symphony

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| Symphony Orchestra Program - Clippings, Correspondence with Symphonies, Budget Information, 1953-1981 | box 20 | folder 178 |
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| Mellon Symphony Program Analysis, 1986-1988 | box 20 | folder 179 |
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| Symphony Orchestra Program - Annex and Exhibit Files, 1973-1976 | box 20 | folder 180 |
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| Symphony Orchestras - Annexed to Agreements, Terms of Grant, Handwritten Notes, 1966-1975 | box 20 | folder 181 |
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| Mellon/Symphony Orchestra Program - Addresses and Staff, Drafts, and Calculation of Current Position (3 folders), 1974-1979 | box 20 | folder 182-184 |
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| Symphony Orchestra Program - Quarterly Payments, 1971-1978 | box 20 | folder 185 |
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Scope and Contents

Spreadsheets - yearly sheets, summary spreadsheets for all years, and addendum sheets

| | | |
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| Symphony and Orchestra Program #1 - 1-10 - KH, 1972-1986 | box 20 | folder 186 |
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Scope and Contents

Includes financial reviews from various fiscal years in the 1960s, '70s, and '80s for:

1. American Symphony
2. Atlanta Symphony
3. Baltimore Symphony
4. Birmingham Symphony Association
5. Boston Symphony
6. Brooklyn Philharmonic
7. Buffalo Philharmonic
8. Chicago Symphony
9. Cincinnati Symphony
10. Cleveland Symphony

Symphony and Orchestra Program #1 - 11-20 - KH, 1986

box 20

folder 187

Scope and Contents

Includes financial reviews from various fiscal years in the 1960s, '70s, and '80s for:

11. Columbus Symphony Orchestra
12. Dallas Symphony
13. Denver Symphony
14. Detroit Symphony
15. Festival Casals
16. Festiva Orchestra
17. Florida Symphony
18. Fort Wayne Philharmonic
19. Hartford Symphony
20. Honolulu Symphony

Symphony and Orchestra Program #1 - 21-29 - KH, 1986

box 21

folder 188

Scope and Contents

Includes financial reviews from various fiscal years in the 1960s, '70s, and '80s for:

21. Houston Symphony
22. Hudson Valley Philharmonic
23. Indianapolis Symphony
24. Jacksonville Symphony
25. Kalamazoo Symphony
26. Kansas City Philharmonic
27. Little Orchestra
28. Los Angeles Philharmonic
29. Louisville Philharmonic

Symphony and Orchestra Program #2 - 30-39 - KH, 1986

box 21

folder 189

Scope and Contents

Includes financial reviews from various fiscal years in the 1960s, '70s, and '80s for:

30. Memphis Orchestral
31. Milwaukee Symphony
32. Minnesota Orchestra
33. Nashville Symphony
34. National Symphony
35. New Haven Symphony Orchestra
36. New Jersey Symphony
37. New Orleans Symphony
38. New York Philharmonic
39. North Carolina Symphony

Symphony and Orchestra Program #2 - 40-49 - KH, 1986

box 21

folder 190

Scope and Contents

Includes financial reviews from various fiscal years in the 1960s, '70s, and '80s for:

40. Oakland Symphony Orchestra
41. Oklahoma City Symphony
42. Omaha Civic Music Association
43. Philadelphia Orchestra
44. Phoenix Symphony Orchestra
45. Pittsburgh Symphony
46. Oregon Symphony
47. Rhode Island Philharmonic
48. Richmond Symphony
49. Rochester Philharmonic

Symphony and Orchestra Program #2 - 50-61 - KH, 1986

box 21

folder 191

Scope and Contents

Includes financial reviews from various fiscal years in the 1960s, '70s, and '80s for:

50. Sacramento Philharmonic
51. San Antonio Symphony
52. San Diego Symphony
53. San Francisco Symphony
54. Seattle Symphony
55. Shreveport Symphony
56. St. Louis Symphony
57. Syracuse Symphony
58. Toldeo Orchestra
59. Tulsa Philharmonic
60. Utah Symphony
61. Wichita Symphony

Symphony Orchestra Program - Workbook - Book I (A-F),
1962-1972

box 21

folder 192

Scope and Contents

Includes:

Review Memos Chart

Summary of SOP Maintenance Problems

American Symphony Orchestra

Baltimore Symphony Orchestra Association

Birmingham Symphony Association

Boston Symphony Orchestra

Brooklyn Philharmonia, Inc.

Buffalo Philharmonic Orchestra Society, Inc.

Chicago Symphony Orchestra

Cincinnati Symphony Orchestra

Columbus Symphony Orchestra

Dallas Symphony Association

Denver Symphony

Detroit Symphony Orchestra

Festival Orchestra Society

Florida Symphony Orchestra

Symphony Orchestra Program - Workbook - Book II (H-M),
1967-1972

box 21

folder 193

Scope and Contents

Includes:

Symphony Society of Greater Hartford, Inc.

Honolulu Symphony Society

Houston Symphony Society

Indiana State Symphony Orchestra

Jacksonville Symphony Association

Kalamazoo Symphony Society

Little Orchestra Society

Southern California Symphony - Hollywood Bowl
Association

Louisville Philharmonic Society

Memphis Orchestral Society, Inc.

Milwaukee Symphony Orchestra, Inc.

Minnesota Orchestral Association

Symphony Orchestra Program - Workbook - Book III (N-R),
1971-1972

box 22

folder 194

Scope and Contents

Includes:

Nashville Symphony Orchestra

National Symphony Orchestra Association

New Jersey Symphony Orchestra

New Haven Symphony Orchestra

New Orleans Philharmonic Orchestra

The Philharmonic-Symphony Society of New York, Inc.

North Carolina Symphony Society, Inc.

Oakland Symphony Orchestra Association

Oklahoma City Symphony Society

Omaha Symphony Association

Oregon Symphony Society

Philadelphia Orcherstra Association

Phoenix Symphony Association

Pittsburgh Symphony Society

Richmond Symphony, Inc.

Rhode Island Philharmonic Orchestra

Rochester Civic Music Association, Inc.

Symphony Orchestra Program - Workbook - Book IV (S-Z),
1971-1972

box 22

folder 195

Scope and Contents

Includes:

Sacramento Symphony Association

St. Louis Symphony Society

Symphony Society of San Antonio

San Diego Symphony Orchestra Association

San Francisco Symphony Association

Seattle Symphony Orchestra, Inc.

Shreveport Symphony Society

Syracuse Symphony Society, Inc.

Toledo Orchestra Association

Tulsa Philharmonic Society, Inc.

Utah Symphony Society

Wichita Symphony Society

| | | |
|--|--------|------------|
| Symphony Orchestra Program Review 1 - A-B - Handwritten Worksheets, 1973-1977 | box 22 | folder 196 |
|--|--------|------------|

Scope and Contents

Includes:

American Symphony

Atlanta Arts Alliance, Inc.

Baltimore Symphony Orchestra, Inc.

Birmingham Symphony Association

Boston Symphony

Brooklyn Philharmonia, Inc.

Buffalo Philharmonic Orchestra

| | | |
|--|--------|------------|
| Symphony Orchestra Program Review 2 - C - Handwritten Worksheets, 1974-1976 | box 22 | folder 197 |
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Scope and Contents

Includes:

Chicago Symphony

Cincinnati Symphony Orchestra

Cleveland Orchestra

Columbus Symphony Orchestra

Symphony Orchestra Program Review 3 - D - Handwritten
Worksheets, 1974-1976

box 22

folder 198

Scope and Contents

Includes:

Dallas Symphony Association, Inc.

Denver Symphony Association

Detroit Symphony Orchestra, Inc.

Symphony Orchestra Program Review 4 - E-H - Handwritten
Worksheets, 1972-1976

box 23

folder 199

Scope and Contents

Include:

Festival Orchestra Society

Florida Symphony

Fort Wayne Philharmonic

Hartford Symphony

Honolulu Symphony Society

Houston Symphony

Hudson Valley Philharmonic

Symphony Orchestra Program Review 5 - I-L - Handwritten
Worksheets, 1972-1976

box 23

folder 200

Scope and Contents

Include:

Indianapolis Symphony

Jacksonville Symphony

Kalamazoo Symphony Society

Little Orchestra Society, Inc.

Los Angeles Philharmonic/Southern California Symphony-
Hollywood Bowl Association

Louisville Philharmonic

| | | |
|--|--------|------------|
| Symphony Orchestra Program Review 6 - M-N - Handwritten Worksheets, 1973-1980 | box 23 | folder 201 |
|--|--------|------------|

Scope and Contents

Include:

Memphis Orchestral Society

Milwaukee Symphony Orchestra, Inc.

Minnesota Orchestral Association

Nashville Symphony Association

National Symphony Orchestra

| | | |
|--|--------|------------|
| Symphony Orchestra Program Review 7 - N - Handwritten Worksheets, 1973-1980 | box 23 | folder 202 |
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Scope and Contents

Includes:

National Symphony Orchestra Association of Washington,
D.C.

New Haven Symphony Orchestra, Inc.

New Jersey Symphony Orchestra

The Philharmonic-Symphony Society New York, Inc.

| | | |
|--|--------|------------|
| Symphony Orchestra Program Review 8 - O - Handwritten Worksheets, 1975-1977 | box 24 | folder 203 |
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Scope and Contents

Includes:

Oakland Symphony Orchestra Association

Oklahoma City Symphony Society

Omaha Symphony Association

Oregon Symphony Society

| | | |
|--|--------|------------|
| Symphony Orchestra Program Review 9 - P-R - Handwritten Worksheets, 1975-1977 | box 24 | folder 204 |
|--|--------|------------|

Scope and Contents

Includes:

The Philadelphia Orchestra Association

Phoenix Symphony Association

Pittsburgh Symphony Society

Rhode Island Philharmonic Orchestra

The Richmond Symphony

Rochester Philharmonic Orchestra, Inc.

| | | |
|---|--------|------------|
| Symphony Orchestra Program Review 10 - S - Handwritten Worksheets, 1973-1978 | box 24 | folder 205 |
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Scope and Contents

Includes:

Sacramento Symphony Association

St. Louis Symphony Society

San Antonio Symphony Society

San Diego Symphony

San Francisco Symphony Association

Seattle Symphony

| | | |
|---|--------|------------|
| Symphony Orchestra Program Review 11 - S-Z - Handwritten Worksheets, 1973-1980 | box 24 | folder 206 |
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Scope and Contents

Includes:

Seattle Symphony Orchestra, Inc.

Shreveport Symphony Society

Syracuse Symphony Orchestra, Inc.

Toledo Orchestra Association, Inc.

Tulsa Philharmonic Society, Inc.

Utah Symphony Society

Wichita Symphony Society, Inc.

| | | |
|--|--------|----------------|
| Symphony Orchestra Program - Discussion Papers - Binder 1 (2 folders), 1964-1966 | box 25 | folder 207-208 |
|--|--------|----------------|

Scope and Contents

Papers include:

Humanities and the Arts Program Planning Budget - Information Paper - June 1964

Discussion Paper Program for Symphony Orchestras - September 8, 1964 (blue cover sheet)

Discussion Paper Program for Symphony Orchestras - September 24-25, 1964 (yellow cover)

Program Planning Budget Request for Fiscal 1966-1976-1968 - June 1965 - Information Paper

Board of Trustees Docket - September 30-Oct. 1, 1965

Request for Grants out of Appropriation - May 27, 1966

Also includes orchestra budget overview documents (appendices), theater companies financial data, ballet companies financial data, civic operas financial data, and major opera companies financial data

The Ford Foundation, September 30-October 1, 1965 Meeting, Part III Humanities and the Arts, Board of Trustees Docket

Processing Information:

Processing Information

Removed from original binder during accessioning

| | | |
|--|--------|------------|
| Symphony Orchestra Program - Discussion Papers - Binder 2, 1964-1972 | box 25 | folder 209 |
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Scope and Contents

Papers include:

Program Planning Budget - June 1964 - Information Paper

Discussion Paper - September 8, 1964 (blue cover sheet)

Discussion Paper - September 24-25, 1964 (yellow cover)

Program Planning Budget - June 1965 - Information Paper

Board of Trustees Docket - September 30-Oct. 1, 1965

Request for Grants out of Appropriation - May 27, 1966

Trust Committee Meeting - April 20, 1972

Processing Information:

Processing Information

Removed from original binders during accessioning

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| Symphony Orchestra Program - Background, 1966-1985 | box 25 | folder 210 |
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Scope and Contents

Includes:

1. Notes: Overview and Essential Elements of Program
2. SOP Grantees - List of Grantees from 1966 Press Release
3. Major Orchestras: List of Major Orchestras, Tentative Allocations, Pre-Grant Questionnaire Covering Letter and Mailing List
4. Metropolitans: List of Metropolitan Orchestras, Tentative Allocations, Affirmative Action (Women) Tally, ASOL Classifications, Pre-Grant Questionnaire Covering Letter and Mailing List
5. Borderline Cases: Discussion Status Report, March 3, 1966
6. Terms and Matching: Notes and Memoranda
7. Questionnaire: Tally of Three Pre-Grant Questionnaire, by Orchestra Sample Questionnaires, 4/27/65, 11/3/65, 4/12/66
8. Disposability Letter 6/1/72: Sample letter regarding treatment of net realized capital gains
9. Reallocation Letter 9/1/72: Sample letter regarding redistribution of trust with mailing list
10. Letter Report 2/1/73 - FF Letter including "Symphonic Strains (Financial)"
11. Statistics: Wages, allocations, union negotiations notes, operating data 1970-1981

| | | |
|--|--------|------------|
| Symphony Orchestra Program - Yearly Evaluations, 1971-1984 | box 25 | folder 211 |
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Scope and Contents

Includes:

1. Post-1976 SOP Evaluation - Memo, Thompson to Kennedy, 1977 - "Symphony Orchestras: Then vs. Now and the Future"; FF Letter, 1973 - "Symphonic Strains (Financial)"
2. 1975 SOP Evaluation - Review Memorandum, 1975; Memo LRV to MATT suggesting graphic displays, 1975
3. 1974 SOP Evaluation - Changes in Budget Level Groupings, 1974
4. 1973 SOP Evaluation - Orchestras Ranked by Expenses 1973, 72, 71; Changes in Budget Level Groupings, 1973
5. 1972 SOP Evaluation - Review Memorandum, 1972; Orchestras Ranked by Expenses, 1971 and 72; Changes in Budget Level Groupings, 1972; Percentage Matching Achieved by orchestram 1972; Memo LRV to MATT, 1973, "Most Frequent Worksheet Review Points"
6. 1971 SOP Evaluation - Table I Orchestras Ranked by Per Cent of Matching Achieved, Table II Orchestras Ranked by Total Expenses, 1971, Table II Orchestras Ranked by Endowment, Table IV Cost vs. Market Value of Matching Fund Assets, 1971, Table V Analysis of Total Expense for Nine Years, 1962-1971, Table VI Net Current Position by Orchestra 1971

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|---|--------|------------|
| Symphony Orchestra Program - Trust Distribution - Final Grant Status Reports, 1966-1980 | box 26 | folder 212 |
| Symphony Orchestra Program - Deferred Income Analysis, 1972-1985 | box 26 | folder 213 |
| Symphony Orchestra Program - Evaluation of Developmental Funds A-Z, 1967-1985 | box 26 | folder 214 |

Scope and Contents

Includes:

1. Summary Evaluation Memorandum, Oleg Lobanov, 1972
2. Evaluation Memoranda for Developmental Grants, by Orchestra, with Attachments: Utilization of Developmental Funds 1967-71

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| Symphony Orchestra Program - Summary of Transactions A-Z, 1966-1980 | box 26 | folder 215 |
| Symphony Orchestra Program - Post-1976 Review Material, 1966-1987 | box 26 | folder 216 |
| Symphony Orchestra Program - Summary Worksheets for 1976 Review, 1965-1985 | box 26 | folder 217 |

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1. Grants Summary - Grants Listed by Amount of Matching
Requited Grant Amounts, Original and Modified, by
Orchestra Developmental Fund Payments
2. Matching Achieved - "Table I" - Orchestras Ranked
by Per Cent of Matching Achieved, Percentage Matching
Achieved, by Orchestra, 1972, Final
3. Matching Fund Fair Market Value - By Orchestra,
1971-1976, Matching Funds Accounts Breakdown (Stock,
Bonds, Comm. Paper, Other)
4. Endowment Intentions - Summary of Responses by
Orchestra
5. Other Endowments Funds at Book Value - By Orchestra,
1971-76
6. Endowment/Investment Income - By Orchestra, 1965, 75
7. Matching Fund Rate of Return - By Group, No Figures
for Individual Orchestras, 1975
8. General Fund Balance - By Orchestra, 1972-1976
9. Notes Payable - By Orchestra, 1975, 76
10. Total Expenses - By Orchestra, 1965, 1971-76
11. Rank by Total General Operating Expenses - Orchestras
Ranked for 1965, 1971-76
12. Earned Income - By Orchestra, In Dollars, 1972-1976
13. Per Cent Earned Income/Total Expenses - By Orchestra,
1963-70 (incomplete), 1971-76; Rank Order, 1975, 76;
Broadcast and Recording Income, by Orchestra, 1965, 75
14. Earnings Gap - By Orchestra, 1972-1976
15. Grants and Contributions, By Orchestra, 1972-1976
16. Maintaining/Sustaining - Sustaining Funds (Required vs.
Achieved), \$ Raised and # Contributors
17. Tax Support - By Orchestra, Analysis of Grants and
Gifts Sources, 1965, 1973, 1975
18. Net Income (Loss) - By Orchestra, 1971-76
19. Multi-Year Forecast - By Orchestra , Info. on Long
Range Plans
20. Auditors - By Orchestra, 1971-1976

21. Season and Wages - Contract Minimums, by Orchestra,
1976-77; Clippings re union negotiations; Weeks/
Performances/Personnel, by Orchestra, 1966, 1975

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| Symphony Orchestra Program - Proposed Financing Plan - Meeting October 15, 1976, 1976 | box 27 | folder 218 |
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Scope and Contents

Notes and Memoranda: Proposed plan for Ford Foundation
50% participation in local loans to retire existing liabilities

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| Symphony Orchestra Program - Financial Worksheets for 1976 Review, 1972-1976 | box 27 | folder 219 |
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1. Net Current Position Summary, 1976 (by orchestra)
2. Net Working Capital (Deficiency), 1976 (27 orchestras
only)
3. Aggregate Net Current Position, 1972-1976
4. Net Current Position, 1972-1976 (by budget group and
orchestra)
5. Current Assets, 1972-76 (by orchestra)
6. Current Liabilities, 1972-76 (by orchestra)
7. Summaries of Changes in Budget Levels, 1972-76
8. Worksheets by Budget Level (data shown for each
orchestra), 1972-76

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|---|--------|-------------------|
| Symphony Orchestra Program - Investment Plans and Responses to Questionnaire (4 folders), 1973 | box 27 | folder 220-223 |
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Scope and Contents

1. Notes and Memoranda Regarding Questionnaire
2. Response, by orchestra, to "Attachment II" of August 1,
1973 letter

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| Symphony Orchestra Program - Long-Range Planning Responses, Orchestras A-Z (3 folders), 1975 | box 27 | folder 224 |
| | box 28 | folder 225-226 |

Scope and Contents

- 1. Response forms by orchestra - Long-Range Planning
- Checklist, Investment Breakdown of Endowment Funds -
- Stocks, Bonds, Commercial Paper, Other

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Cash Reserve Program, 1965-1987

Biographical / Historical

The Cash Reserve Program was a Ford Foundation initiative that provided a series of non-renewable grants to civic opera companies and performing arts organizations in theater and dance. The program began in 1971 with a total of \$8 million. The goal of the program was to alleviate grantees' cash flow problems while preventing the grantee from becoming dependent on the Ford Foundation. If, by the end of any given fiscal year, the grantee had not produced sufficient income, earned and contributed, to meet all operating expenses, it would mean that the grantee had been dependent on the Foundation for operating support and would be excluded from further participation in the program. If the grantee met all of the conditions of the grant and remained in the program for four years, then it would end up with a cash reserve.

| Title/Description | Instances | |
|---|-----------|----------------|
| Cash Reserve Program - Arts and the Ford Foundation (2 folders), 1975-1981 | box 28 | folder 227-228 |
| Default: Grant Rescinded - Cash Reserve Program, 1971-1982 | box 28 | folder 229 |
| Cash Reserve Program - Reports, 1972-1982 | box 28 | folder 230 |
| Scope and Contents | | |
| Education and Culture Committee: A Supplement to Part II Results, March 1982 | | |
| The Stabilization Strategy: An Interim Report, 1972-1980 | | |
| Mellon Symphony Orchestra Program: An Interim Report, 1977-1980 | | |
| Interim Assessment of the Cash Reserve Program Grants to Selected Professional Performing Arts Organizations - Draft, Donald McDonagh (2 folders), 1978 | box 28 | folder 231-232 |
| Humanities and the Arts Division: Cash Reserve Program - Trustees Subcommittee Meeting, 1971 September 15 | box 28 | folder 233 |
| Cash Reserve Program - Nonrenewable Grants Program (2 folders), 1970-1971 | box 28 | folder 234 |
| | box 29 | folder 235 |
| Cash Reserve Grants - Background (1972 to date), 1971-1974 | box 29 | folder 236 |
| Cash Reserve Program Grants, 1971-1980 | box 29 | folder 237 |
| Cash Reserve - National Arts Stabilization Fund (NASF), Early Payees, Board Development (2 folders), 1982-1984 | | |

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| | box 29 | folder 238-239 |
| Evaluation - Status Reports - Program for Administrative Interns and Museum Curatorial Training Program, 1977 May-June | box 29 | folder 240 |
| Evaluation - Default: In Final Year Only - Cash Reserve Program, 1971-1975 | box 29 | folder 241 |
| Scope and Contents | | |
| Springfield Theatre Arts Association, Ballet West, Kansas City Lyric Theater, New Orleans House Association, Houston Grand Opera Association, Inc., American Ballet Theatre (Ballet Theatre Foundation), Kansas City Lyric Theater, Opera Festival Association (Lake George Opera Festival) | | |
| Evaluation - Default: In Final Year + One Earlier - Cash Reserve Program, 1971-1979 | box 29 | folder 242 |
| Scope and Contents | | |
| Dance Theatre Foundation, The Boston Ballet, Opera Company of Boston | | |
| Evaluation - Default: Interim Only and Modified - Cash Reserve Program, 1970-1980 | box 29 | folder 243 |
| Scope and Contents | | |
| Center Stage Associates, Western Opera Theater | | |
| Evaluation - Swing Year Grantees and Provisions - Cash Reserve Program, 1971-1976 | box 29 | folder 244 |
| Scope and Contents | | |
| Asolo State Theater | | |
| Cash Reserve Evaluation: Geographic Distribution - Dance, Theater, and Opera Programs, 1976-1978 | box 29 | folder 245 |
| Evaluation - Extension History, 1975-1979 | box 29 | folder 246 |
| Evaluation - Exchange with RGIC, 1977-1978 | box 29 | folder 247 |
| Cash Reserve Grants - Background, 1972-1980 | box 29 | folder 248 |
| Cash Reserve Grants - Background, 1971-1980 | box 30 | folder 249 |
| Cash Reserve Statistics and Analysis - Binder 1, 1970-1977 | box 30 | folder 250 |

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Sections include:

Net Current POS

Long-Term Liability

Cash Reserve Balance

General Operating Expenses

Earned Income

Earnings Gap

Grants and Gifts

General Operating Income

Net Income (Loss)

Cash Reserve Statistics and Analysis - Binder 2 (2 folders),
1975-1977

box 30

folder
251-252

Scope and Contents

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(Empty sections) Endowment Funds, Plant Fund, Deferred
Income Analysis, General Operation Expenses, Earned
Income, Earning Gap, Grants and Gifts, Net Income (Loss),
Summaries

Net Current Position

Cash Reserve Fund

General Operation Income

Grants and Gifts

Net Current Assets

Working Capital (Cash) Reserve

General Operating Expenses

Earned Income

Net Current Position

Working Capital Reserve

General Operating Expenses

Earned Income

Grants and Gifts

Cash Reserve Statistics and Analysis - Binder 3, 1975-1977

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| Cash Reserve Statistics and Analysis - Binder 4, 1971-1981 | box 30 | folder 254 |
| Stabilization (Cash Reserve Program) Letters of Grants - A-B, 1975-1985 | box 31 | folder 255 |
| Stabilization (Cash Reserve Program) Letters of Grants - C-G, 1975-1985 | box 31 | folder 256 |
| Stabilization (Cash Reserve Program) Letters of Grants - H-M, 1975-1985 | box 31 | folder 257 |
| Stabilization (Cash Reserve Program) Letters of Grants - N-O, 1972-1985 | box 31 | folder 258 |
| Stabilization (Cash Reserve Program) Letters of Grants - P-R, 1977-1987 | box 31 | folder 259 |
| Stabilization (Cash Reserve Program) Letters of Grants - S, 1977-1987 | box 32 | folder 260 |
| Stabilization (Cash Reserve Program) Letters of Grants - T-Z, 1977-1987 | box 32 | folder 261 |
| Economic Survey - Theater - Canadian and Defunct - IV, 1965-1966 | box 32 | folder 262 |

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Folder alternatively titled SAB Site Visits

Information sheets for:

Academy Theatre

Theatre Communications Group - Phoenix Theatre

TCG Theatre Information Sheet - Lyceum Theatre

Syracuse Repertory Theatre

NYSF Public Theater

New York Shakespeare Festival Public Theater

Alliance Theatre Company

American Place Theatre

Repertory Theatre at Loretto-Hilton Center

Canadian and Defunct:

Manitoba Theatre Center

Stratford Festival

Defunct:

Actor's Workshop

Atlanta Municipal Theater

Charles Playhouse

Front Street Theatre

Pasadena Playhouse

Stanford Repertory Theatre

Theatre of the Living Arts

Theatre Saint Paul

Economic Survey - Ballet and Modern Dance, 1971-1973

box 32

folder 263

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Ballet

1. New York City Ballet
2. Ballet Theatre Foundation, Inc.
3. Joffrey Ballet
4. Pennsylvania Ballet
5. National Ballet Society, Inc.
6. San Francisco Ballet Company
7. Boston Ballet Company, Inc.
8. Ballet West
9. Dance Theatre of Harlem, Inc.
10. Houston Ballet Foundation

Modern Dance

1. Alvin Ailey City Center Dance Theatre
2. American Ballet Theater Company
3. Merce Cunningham and Dance Company
4. Martha Graham Center of Contemporary Dance
5. Erick Hawkins Dance Company
6. Murray Louis Dance Company

7. Alwin Nikolais Dance Theatre
8. Repertory Dance Theater
9. Paul Taylor Dance Foundation, Inc.

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|--|--------|------------|
| Economic Survey - Theater - \$500,000 or Less - III, 1970-1971 | box 32 | folder 264 |
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Actors Theatre of Louisville

Asolo Theatre

Barter Theatre

Center Stage Associate

Champlain Shakespeare Festival

Hartford Stage Co.

Meadow Brook Theatre

Mummers Theatre

New Orleans Repertory Theatre

Stage/West

Theatre Co. of Boston

Washington Theatre Club

Yale Repertory Theatre

| | | |
|---|--------|------------|
| Economic Survey - Theater - Between \$500,000 and \$1,000,000 - II, 1970-1971 | box 32 | folder 265 |
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Alley Theater

Cincinnati Playhouse in the Park

Cleveland Play House

Long Wharf Theater

Milwaukee Repertory Theatre

Negro Ensemble Company, Inc.

Seattle Repertory Theatre

Studio Arena Theater

Trinity Square Repertory Theatre

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| Economic Survey - Theater - \$1,000,000 and Over - I, 1966-1967 | box 33 | folder 266 |
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American Conservatory Theatre

American Shakespeare Theatre

Arena Stage

Goodman Theater (Art Institute of Chicago)

Guthrie Theatre (Minnesota Theatre Co.)

Repertory Theatre of Lincoln Center, Inc.

Taper Forum, Mark

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| Economic Survey - Symphony (Part I), 1970-1971 | box 33 | folder 267 |
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Scope and Contents

Sections include:

Between \$500,000 and \$1,000,000

\$2,500,000 and Over

Between \$1,000,000 and \$2,500,000

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|---|--------|------------|
| Economic Survey - Symphony (Part II), 1970-1971 | box 33 | folder 268 |
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Scope and Contents

Sections include:

Between \$250,000 and \$500,000

\$250,000 or Less

| | | |
|------------------------------------|--------|------------|
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Scope and Contents

Sections include:

Between \$250,000 and \$500,000

\$250,000 or Less

\$1,000,000 and Over

Between \$500,000 and \$1,000,000

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National Arts Stabilization Fund (NASF), 1970-1994

Biographical / Historical

Marcia Thompson established the National Arts Stabilization Fund (NASF) in 1983 with grants from the Ford Foundation, the Rockefeller Foundation, and the Andrew W. Mellon Foundation. The NASF recognized that most arts organizations lack both the capital resources, and in many cases, the management and planning systems that are essential for the long-term financial health of their organization. The NASF focused on working with local community leaders, local fundraisers, and local arts organizations to fund regional stabilization projects. Thompson served as the president of the NASF from 1983-1991.

| Title/Description | Instances | |
|---|-----------|------------|
| National Arts Stabilization Fund (NASF) Board, 1976-1993 | box 33 | folder 270 |
| National Arts Stabilization Fund (NASF) - Executive Summary, 1985 | box 33 | folder 271 |
| National Arts Stabilization Fund (NASF) - Milwaukee, 1991-1993 | box 33 | folder 272 |
| Board Members, 1986-1994 | box 33 | folder 273 |
| National Arts Stabilization Fund (NASF) Board - Time Records, 1990-1993 | box 55 | folder 457 |

Conditions Governing Access:

Conditions Governing Access

Confidential Material

| | | |
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| Correspondence and Meeting Materials, 1983-1993 | box 34 | folder 274 |
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Includes:

Leading Recipients of Foundation Grants

Pericles, Prince of Tyre, CenterStage, The Head Theater

Overview of The Kreisberg Group, Ltd.

Worcester Art Museum correspondence

Chairman's Agenda and Exhibits - 6/83

Correspondence with Susan Berresford

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| National Arts Stabilization Fund (NASF) - RGAs, Finance Committee Report, News Clippings, Memos, and Correspondence (2 folders), 1984-1994 | box 34 | folder 275-276 |
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| National Arts Stabilization Fund (NASF) - The First Phase (2 copies), 1987 October | box 34 | folder 277 |
| Marcia T. Thompson, Vice Chairman, National Arts Stabilization Fund (NASF) - Correspondence (2 folders), 1986-1994 | box 34 | folder 278-279 |
| National Arts Stabilization Fund - Funding Models (2 folders), 1983-1984 | box 34 | folder 280-281 |
| National Arts Stabilization Fund - Policy and Planning Committee, 1983-1989 | box 34 | folder 282 |
| National Arts Stabilization Fund (NASF) Board - Yale School of Drama - Final Exam, 1981 May | box 35 | folder 283 |
| Ford Foundation Pre-National Arts Stabilization Fund (NASF), 1970-1985 | box 35 | folder 284 |
| National Arts Stabilization Fund (NASF) - Financial Accounting Standard Board (FASB) (2 folders), 1988-1994 | box 35 | folder 285-286 |
| National Arts Stabilization Fund (NASF) - Correspondence, 1977-1988 | box 35 | folder 287 |
| National Arts Stabilization Fund (NASF) - Publications, Proposals, Correspondence (3 folders), 1989-1993 | box 35 | folder 288-290 |

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Proposal to Pennsylvania Ballet

Denver Symphony Orchestra

National Arts Stabilization Fund (NASF): Restructuring Arizona's Arts Institutions by Glenn Peters

Publications List

Worcester Art Museum case statement

Proposal to Pennsylvania Ballet, September 1989

Contribution Bonds: A Development Campaign Security Program, For Universities and Colleges

Photos - DeCordova and Dana Museum and Park, Marcia Thompson and John B. French

| | | |
|---|--------|----------------|
| Ford Foundation - National Arts Stabilization Fund (NASF), Applications, Reports (4 folders), 1981-1989 | box 35 | folder 291-292 |
| | box 36 | folder 293-294 |
| National Arts Stabilization Fund (NASF) - Staff Memos, Responses, Fax Materials, 1983-1993 | box 36 | folder 295 |
| Marcia T. Thompson Correspondence and Meeting Materials - President of National Arts Stabilization Fund (NASF), 1981-1988 | box 36 | folder 296 |

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| National Arts Stabilization Fund - Background, Strategies, Awards (2 folders), 1992-1993 | box 36 | folder 297-298 |
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Tab 2: Development of a Local Project

Tab 3: The Stabilization Grant Process

Tab 4: Preliminary Criteria for Participation

Tab 5: Awards Announced as of December 31, 1992

Tab 6: Nominees by Project Site

Tab 7: Nominees by Discipline

Tab 8: Board of Directors

Tab 9: Growth: Comments and Observations

Tab 10: New York City Loan Initiative

Tab 11: Quarterly Progress Report - New York City Project

Tab 12: Typical Request for Grant Action (Alvin Ailey)

Tab 13: Typical Letter and Terms and Conditions of Grant (Alvin Ailey)

Tab 14: Typical NASF Awards Release (Intiman)

Tab 15: Selected News Coverage

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|--|--------|----------------|
| National Arts Stabilization Fund (NASF) - Meeting of the Board of Directors - Minutes, Correspondence, Clippings, Theatre Communications Group Publications (3 folders), 1983-1992 | box 36 | folder 299-301 |
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| National Arts Stabilization Fund (NASF) - Awards and Nominations Newsletter Edits, 1990 | box 37 | folder 302 |
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| National Arts Stabilization Fund (NASF) - Financial Database, 1987 April | box 37 | folder 303 |
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| National Arts Stabilization Fund (NASF) - Leadership Alliances, 1980-1994 | box 37 | folder 304 |
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|---|--------|------------|
| National Arts Stabilization Fund (NASF) - Job Descriptions, 1989-1993 | box 37 | folder 305 |
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|---|--------|------------|
| National Arts Stabilization Fund (NASF) - Board of Directors Meeting, 1983-1986 | box 37 | folder 306 |
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Ford Foundation Board of Trustees, 1955-1992

Scope and Contents

Ford Foundation Board of Trustees meeting materials related to Ford initiatives in the arts and humanities.

| Title/Description | Instances | |
|--|-----------|----------------|
| Board of Trustees Meeting, 1971 March | box 37 | folder 307 |
| Scope and Contents Sections include: Symphony Mellon Symphony Ford Foundation Stabilization Endowment Grants Boston Conservatories | | |
| Meeting of the Board of Trustees, 1980 March | box 37 | folder 308 |
| Trustees Committee of the Arts (2 folders), 1975-1980 | box 37 | folder 309-310 |
| Shereff, Friedman, Hoffman and Goodman - Board Meeting Minutes (Drafts) (4 folders), 1972-1992 | box 37 | folder 311 |
| | box 38 | folder 312-314 |
| Board of Trustees - Catalogues Program Background, 1967-1977 | box 38 | folder 315 |

Scope and Contents

Sections include:

Appropriations and DAP

Fact Sheet/Letters/Budgets and Report Forms

Grants Awarded

Published/To Be Evaluated

Catalogues Evaluated

Applications Rejected

Collections and Interest

Sample Advertising Plan

| | | |
|--|--------|----------------|
| Trustees Committee Meeting - Office of the Arts, 1975 December 11 | box 38 | folder 316 |
| Faculty Salaries Hospital Support Medical Education, A Statement by the Trustees of the Ford Foundation, Special Appropriations, 1955 December 8-10 | box 38 | folder 317 |
| Office of the Arts - Supplement to June 25, 1975 - Trustee Committee Meeting, 1975 July 31 | box 38 | folder 318 |
| Information Paper for the Trustees Committee on Education and Public Policy - The Arts Program, 1980 March | box 38 | folder 319 |
| Ford Foundation Board of Trustees/Future Program Planning Project/1976 - Staff Responses to Alexander Heard's September 24 Memorandum, "Next Steps in Planning for the Foundation's Future" - Volume I and II, 1976 November | box 39 | folder 320-321 |
| Grants-in-Aid Programs, 1958-1971 | box 39 | folder 322 |
| Grants-in-Aid - Fact Sheets, Letters, Awards, 1958-1965 | box 39 | folder 323 |
| Grants-in-Aid - Materials, 1958-1969 | box 39 | folder 324 |
| Grant-in-Aid - Programs and Statistics, 1966-1974 | box 39 | folder 325 |

Scope and Contents

Sections include:

A/I Program

Choral Directors

Concert Artists

Concert Soloists

Creative Writers

Cur. Training

Directors Program

Film Makers

Opera Singers

Poets and Fiction Writers Program

Playwrights Prog.

Theater Design

Visual Artists

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Humanities and the Arts Program Files, 1953-1986

Scope and Contents

Grant files, reports, news clipping, administrative files, correspondence, and financial materials related to the activities of the Ford Foundation's work in the arts and humanities.

| Title/Description | Instances | |
|---|-----------|----------------|
| Ford Foundation Arts History, 1957-1983 | box 40 | folder 326 |
| Education and Public Policy and Humanities and the Arts FY 1957-1981 (3 folders), 1957-1982 | box 40 | folder 327-329 |

Scope and Contents

Sections include:

Statistics - Miscellaneous

Ford Foundation Financial Statements

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|--|--------|------------|
| Office of the Arts FY 1957-1975, 1957-1975 | box 40 | folder 330 |
| Roger Kennedy - Members of the Arts Committee, 1978-1981 | box 40 | folder 331 |
| The Arts in the United States: Inflation, Recession, and Public Policy, 1975 | box 40 | folder 332 |
| Humanities and the Arts - Lists, undated | box 40 | folder 333 |

Scope and Contents

Lists of Individuals:

New York City - Music, Dance, Creative Writing

Boston and Cambridge

Worcester, Massachusetts

New Haven

Dallas

Philadelphia

Baltimore

Washington, D.C.

Virginia

Atlanta

Florida

New Orleans

Cleveland

Cincinnati

Indianapolis and Bloomington

Chicago

Milwaukee

Detroit and Ann Arbor

Minnesota

Iowa City

Urbana, Illinois

St. Louis

Kansas City

Nebraska

Oklahoma

Houston, Texas

Austin, Texas

San Antonio

New Mexico

Tucson

Los Angeles and vicinity

San Francisco (including Oakland, Berkeley, Palo Alto)

Salt Lake City

Denver

Portland

Seattle

New York City

| | | |
|--|--------|----------------|
| Humanities and the Arts - Statistics, 1972-1975 | box 41 | folder 334 |
| Arts Papers - June 1981 Trustees Meeting (4 folders), 1980-1981 | box 41 | folder 335-338 |
| Funding of the Arts from Sources Other Than the Ford Foundation (3 folders), 1975-1981 | box 41 | folder 339-341 |
| Committee on the Future of the Arts, 1978-1980 | box 42 | folder 342 |
| Outline of Arts Paper for the Trustees, 1981 | box 42 | folder 343 |
| Roger G. Kennedy Memos to Arts Committee, 1978 | box 42 | folder 344 |
| National Endowment for the Arts - Correspondence and Proposals, 1971 | box 42 | folder 345 |
| Richard C. Sheldon - Support of the Arts, 1978 November | box 42 | folder 346 |
| Humanities and Arts Program Staff - Lowry Miscellaneous Memoranda (3 folders), 1967-1974 | box 42 | folder 347-349 |
| Humanities and the Arts Program Staff - Marcia Thompson File, 1953-1980 | box 42 | folder 350 |
| Humanities and the Arts Program Staff - Richard Kapp Miscellaneous Memoranda, 1970-1977 | box 42 | folder 351 |
| Humanities and the Arts Program Staff - Lowry, W. McNeil, 1964-1975 | box 43 | folder 352 |

Scope and Contents

Biography and press release

| | | |
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| Humanities and the Arts Program Staff - Lowry, W. McNeil - Personnel File, 1959-1964 | box 55 | folder 458 |
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Conditions Governing Access:**Conditions Governing Access**

Confidential material

| | | |
|---|--------|------------|
| The Ford Foundation Program in Humanities and the Arts (Publication), 1959 February | box 43 | folder 353 |
| Ford Foundation Support for the Arts in the United States: A Discussion of New Emphases in the Foundation's Arts Program, A Working Paper from the Ford Foundation, 1986 August | box 43 | folder 354 |
| Scholars' Work and Works, undated | box 43 | folder 355 |
| Foundation for Humanities and the Arts, 1973-1974 | box 43 | folder 356 |
| Foundation for Humanities and the Arts (FHA) - List of Incorporators, 1973-1978 | box 43 | folder 357 |

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|--|--------|----------------|
| Memo to Members of Arts Committee from Roger G. Kennedy, 1978 February 22 | box 43 | folder 358 |
| Why Bother About the Arts?, 1977 March | box 43 | folder 359 |
| Review of the Arts - January 29, 1981 - Memos, 1976-1981 | box 43 | folder 360 |
| The Arts Program, Information Paper for the Trustees Committee on Education and Public Policy, 1980 March | box 43 | folder 361 |
| Statistics - Ford Foundation and the Arts, 1977-1978 | box 43 | folder 362 |
| Support of the Arts, Richard C. Sheldon, 1978 November | box 43 | folder 363 |
| Ford Arts Program Budget(s) - 1976 Budgets and Commitments, 1976 November 5 | box 43 | folder 364 |
| Humanities and the Arts Committee Agenda (Mrs. Thompson), 1973 March 21 | box 43 | folder 365 |
| Foundation for the Arts - W. McNeil Lowry, 1978-2000 | box 43 | folder 366 |
| Humanities and the Arts Program Statistics (II) - Breakdown by Fiscal Years, 1957-1978 | box 44 | folder 367 |
| Arts Organizations - Geographical Distribution/Founding - Dates 1915-1980, 1980 | box 44 | folder 368 |
| Ford - Arts, 1974-1976 | box 44 | folder 369 |
| Humanities and the Arts Program Statistics - Miscellaneous IX (4 folders), 1969-1978 | box 44 | folder 370-373 |
| Ford Foundation - Education and Public Policy/Arts - General Clippings (2 folders), 1962-1981 | box 45 | folder 374-375 |
| Ford Foundation: Humanities and the Arts - Editorials and Opinion Pieces, 1970-1974 | box 45 | folder 376-377 |
| Ford Foundation - Division of Humanities and the Arts - European and International Activities, 1970 December 30 | box 45 | folder 378 |
| Proposed Budget - Fiscal Years 1974 and 1975, 1973 June | box 45 | folder 379 |
| The Finances of the Performing Arts Volume I - A Survey of 166 Professional Nonprofit Resident Theaters, Operas, Symphonies, Ballets, and Modern Dance Companies: A Ford Foundation Report, 1974 | box 45 | folder 380 |
| The Finances of the Performing Arts Volume II - A Survey of the Characteristics and Attitudes of Audiences for Theater, Opera, Symphony, and Ballet in 12 U.S. Cities: A Report to the Ford Foundation, 1974 | box 46 | folder 381 |
| Division of Humanities and the Arts - Patterns of Objectives and Grant Actions -- The Arts: Summary and Recapitulation, March 1957 - September 30, 1971, 1972 June | box 46 | folder 382 |
| Arts Program, 1961-1975 | box 46 | folder 383 |

Scope and Contents

Sections include:

Arts

Education

Humanities

Division of the Humanities and the Arts

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| Grant Request - Humanities and the Arts, 1962 | box 46 | folder 384 |
| Humanities and the Arts - Administrative Interns Program - Evaluation, 1974 | box 46 | folder 385 |
| Humanities and Arts Discussion Papers - Binder 1 (2 folders), 1956 February-1972 June | box 46 | folder 386-387 |

Scope and Contents

Titles include:

Feb. 9, 1956 - Memorandum - W.M. Lowry: A Program of Philanthropic Support of the Humanities and Creative Arts

Mar. 17-18, 1960 - An Enlarged Program in the Arts

Spring, 1962 - Program Submission Concerning Future Program Activities/The Humanities

Spring, 1962 - Program Submission Concerning Future Program Activities/The Arts

Dec. 6, 1963 - Historic and Architectural Preservation and Restoration

June, 1967 - Humanities and the Arts Division - Program Budget Request, Fiscal Year 1968

June, 1967 - Ten-Year Program Review, 1957-1967

Nov., 1968 - The Economic Crisis in the Arts: The Need for a National Policy

Nov. 19, 1968 - Ford Foundation Strategy in the Arts - A Review

May, 1970 - Some Considerations on Cost Effectiveness in the Performing Arts

Mar. 25-26, 1971 - Excerpt from Docket: Humanities and the Arts Division Nonrenewable Grants in the Performing Arts

Mar. 25-26, 1971 - Excerpt from Docket: Humanities and the Arts Division Cash Reserve Grants

Sep. 15, 1971 - Cash Reserve Program

June, 1972 - Patterns of Objectives and Grant Actions - the Arts Summary and Recapitulation (March 1957 - Sept. 1971)

| | | |
|--|--------|-------------------|
| Humanities and Arts Discussion Papers - Binder 2 (2 folders), 1972 June-1975 July | box 47 | folder 388-389 |
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Scope and Contents

Papers include:

June, 1972 - The Foundation and the Arts: The Decade of the Seventies

June, 1972 - Program Trends for Discussion and Action - The Immediate Future

June, 1975 - Proposed Budget, Fiscal Years 1976 and 1977

June 25, 1975 - Trustee Arts Committee: I. Existing Cash Reserve Program; II. Program Procedures: Monitoring and Technical Assistance; III. Extension: Cash Reserve Program II

July 31, 1975 - Trustee Arts Committee: Supplement to June 25, 1975 Paper

| | | |
|--|--------|-------------------|
| Humanities and Arts Discussion Papers - Binder 3 (2 folders), 1975 December-1979 November | box 47 | folder 390-391 |
|--|--------|-------------------|

Scope and Contents

Papers include:

Dec. 11, 1975 - Office of the Arts: 1. Proposed Programs for Development of Talent and Art Forms; 2. Discussion of State and Community Arts Councils and Possible Foundation Support for their Support; 3. Supplemental Report on the Cash Reserve Program

March, 1977 - Why Bother About the Arts?

June, 1977 - The Arts in June

March, 1978 - The American Classics Revisited

Nov., 1978 - The Arts Office: A Two Year Report

Nov. 20, 1979 - The Foundation's Arts Program

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| Humanities and Arts Discussion Papers - Binder 4 (3 folders), 1980 March-1981 September | box 47 | folder 392 |
| | box 48 | folder |

Scope and Contents

393-394

March, 1980 - The Arts Program

April 23, 1980 - Arts Income Management Management
System: System Specifications

July 7, 1980 - Memorandum - Harold Howe II Substitution
for Cash Reserve Commitments

July 10, 1980 - Arts Income Management System: System
Specifications

Sep., 1980 - The Education Program of the Ford Foundation

Jan., 1981 - Education and Public Policy: Background
Review of the Arts

June, 1981 - The Arts and Culture in the Ford Foundation

Sep. 23-25, 1981 - Docket - Board of Trustees

| | | |
|---|--------|-------------------|
| Humanities and Arts Discussion Papers - Binder 5 (2 folders), 1981 September-1983 December | box 48 | folder 395-396 |
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Scope and Contents

Papers include:

Sep. 23, 1981 - Docket - Education and Culture Committee

March, 1982 - Education and Culture Committee: Binder 1:
Preliminary Program Outline; Binder 2: A Supplement to
Part II/Results

Nov., 1982 - Education and Culture: Excellence and Equity
for the 80's and Beyond

Nov., 1982 - Education and Culture Committee: The
Stabilization Strategy: A Proposed Private Sector Initiative
for the 1980's

Dec., 1982 - Board of Trustees: The Stabilization Strategy:
A Proposed Private Sector Initiative for the 1980's

March, 1983 - Proposed Spending Level, Budget and
Preliminary Program Plans for FY 1984-85

June, 1983 - National Arts Stabilization Fund

Aug. 8, 1983 - Recommendation for Grant Action: National
Arts Stabilization Fund - \$237,193 for start-up expenses

Dec. 8, 1983 - Recommendation for Grant Action: National
Arts Stabilization Fund - \$7,000,000

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Ford Foundation Stabilization Program, 1971-1993

Scope and Contents

The Ford Foundation Stabilization Program built upon the grant making strategies of the earlier Symphony Orchestra Program and the Cash Reserve Program and focused on financial reporting, financial planning, and balance sheet strategies. Eventually, a separate organization, the National Arts Stabilization Fund (NASF), was established from these strategies with the assistance of other funders like the Andrew W. Mellon Foundation and the Rockefeller Foundation. By 1981, grants totaling \$27.6 million had been awarded by the Ford Foundation to 72 arts organizations. Participants in the Ford Stabilization Program included:

Dance:

Alvin Ailey American Dance Theater (NYC)

American Ballet Theatre (NYC)

Ballet West (Salt Lake City)

Boston Ballet

Cunningham Dance Foundation (NYC)

Feld Ballet (NYC)

Houston Ballet

Joffrey Ballet (NYC)

Murray Louis Dance Company (NYC)

New York City Ballet

Nikolais Dance Theatre (NYC)

North Carolina Dance Theater (Winston-Salem)

Paul Taylor Dance Company *NYC)

San Francisco Ballet

Twyla Tharp Dance Foundation (NYC)

Other:

Big Apple Circus (NYC)

Children's Art Carnival (NYC)

North Carolina School of the Arts (Winston-Salem)

Theater:

A Contemporary Theater (Seattle)

Acting Company (NYC)

Actors Theatre of Louisville (KY)

American Conservatory Theatre (San Francisco)

American Place Theatre (NYC)

American Shakespeare Theatre (Stratford, CT)

Arena Stage (Washington, DC)

Arizona Theatre Company (Tucson)

Asolo State Theater (Sarasota, FL)

Center Stage (Baltimore)

Cincinnati Playhouse in the Park

Circle in the Square (NYC)

Circle Repertory Company (NYC)

Cleveland Play House

Eugene O'Neill Theater Center (Waterford, CT)

Folger Theatre Group (Washington, DC)

Guthrie Theater (Minneapolis)

Hartford Stage Company

Indiana Repertory Theatre (Indianapolis)

Long Wharf Theatre (New Haven)

Manhattan Theatre Club (NYC)

Mark Taper Forum (Los Angeles)

McCarter Theatre (NYC)

Negro Ensemble Company (NYC)

New Federal Theatre (NYC)

Oregon Shakespearean Festival (Ashland)

PAF Playhouse (Huntington, NY)

Playwrights Horizons (NYC)

St. Louis, Repertory Theatre of

St. Nicholas Theater Company (Chicago)

Seattle Repertory Theatre

Stage West (Springfield, MA)

Studio Arena Theatre (Buffalo)

Trinity Square Repertory Company (Providence, RI)

Opera:

Baltimore Opera Company

Boston, Opera Company of

Chicago, Lyric Opera of

Cincinnati Opera

Dallas Opera

Fort Worth Opera

Houston Grand Opera

Kansas City, Lyric Opera of (MO)

Kentucky Opera (Louisville)

Lake George Opera Festival (NY)

Michigan Opera Theatre (Detroit)

Minnesota Opera (Minneapolis)

New Orleans Opera

New York City Opera

Portland Opera (OR)

St. Louis, Opera Theatre of

St. Paul Opera

San Diego Opera

San Francisco Opera

Santa Fe Opera (NM)

Seattle Opera

Spring Opera of San Francisco

Washington Opera (DC)

Western Opera Theater (San Francisco)

| Title/Description | Instances | |
|--|------------------|----------------|
| Ford Foundation Stabilization Analysis, 1981-1985 | box 48 | folder 397 |
| Ford Foundation Stabilization Program - Strategy, 1971-1981, 1977-1988 | box 48 | folder 398 |
| Ford Foundation Stabilization Program - Defaults/Modifications/Terminations, 1981-1985 | box 48 | folder 399 |
| Ford Foundation Stabilization Grants IV - Other, 1971-1984 | box 48 | folder 400 |
| Ford Foundation Stabilization Grants, 1986-1988 | box 48 | folder 401 |
| Ford Foundation Stabilization - Comments I & II, 1975-1987 | box 49 | folder 402 |
| Arrangement | | |
| Sorted alphabetically | | |
| Ford Foundation Stabilization Program Results and Statistics, 1971-1984 | box 49 | folder 403 |
| Ford Foundation Stabilization Grants I - Dance (2 folders), 1971-1986 | box 49 | folder 404-405 |
| Ford Foundation Stabilization Program - Outside Affiliations, 1978-1986 | box 49 | folder 406 |
| Ford Foundation Stabilization - Results and Findings, 1971-1983 | box 49 | folder 407 |
| Ford Foundation Stabilization Program - Grants Records Chronological (2 folders), 1971-1974 | box 49 | folder 408 |
| | box 50 | folder 409 |
| Ford Foundation Stabilization Program - Grants Records Chronological (2 folders), 1975-1982 | box 50 | folder 410-411 |
| Stabilization Program - Announcements/Ford Foundation Letter and Grantee Press Releases A-Z (2 folders), 1971-1983 | box 50 | folder 412-413 |
| Stabilization Grantees - At-a-Glance Base Year vs. Grant End, 1971-1981 (2 folders), 1981-1993 | box 51 | folder 414-415 |

Scope and Contents

Ford Foundation Programs I and II At-a-Glance Index (46 tabs in folder):

1. A Contemporary Theatre
2. American Ballet Theatre
3. Arena Stage
4. Arizona Theatre Company
5. Ballet West
6. Baltimore Opera
7. Big Apple Circus
8. Boston Ballet
9. Boston, Opera Company of
10. Center Stage
11. Children's Art Carnival
12. Cincinnati Opera
13. Cleveland Playhouse
14. Cunningham Dance Foundation
15. Feld Ballet
16. Folger Theatre Group
17. Fort Worth Opera
18. Hartford Stage Company
19. Houston Ballet
20. Houston Grand Opera
21. Joffrey Ballet (missing)
22. Lake George Opera
23. Long Wharf Theatre
24. Louis Dance Company, Murray
25. Manhattan Theatre Club
26. Michigan Opera

27. Negro Ensemble
28. New England Conservatory of Music
29. New York City Ballet
30. New York City Opera (missing)
31. Nikolais Dance Company, Alwin
32. North Carolina Dance Theatre
33. North Carolina School of the Arts
34. O'Neill Theatre Center
35. Opera Theatre of Saint Louis
36. Oregon Shakespearean Festival
37. Repertory Theatre of Saint Louis
38. San Diego Opera
39. San Francisco Ballet
40. San Francisco Opera Association
41. Santa Fe Opera
42. Seattle Opera
43. Stage West
44. Taper (Mark) Forum
45. Taylor Dance Company, Paul
46. Tharp Dance Foundation, Twyla

Ford Foundation Stabilization Grants II - Opera (2 folders),
1984-1986

box 51

folder
416-417

Scope and Contents

Tab index:

1. Baltimore Opera Company
2. Boston, Opera Company of
3. Chicago, Lyric Opera of
4. Cincinnati Opera

5. Dallas Opera
6. Fort Worth Opera
7. Houston Grand Opera
8. Kansas City, Lyric Opera of
9. Kentucky Opera (Louisville)
10. Lake George Opera Festival (NY)
11. Michigan Opera Theater (Detroit)
12. Minnesota Opera (Minneapolis)
13. New Orleans Opera
14. New York City Opera
15. Portland Opera (OR)
16. St. Louis, Opera Theatre of
17. St. Paul Opera
18. San Diego Opera
19. San Francisco Opera
20. Santa Fe Opera (NM)
21. Seattle Opera
22. Spring Opera of San Francisco
23. Washington Opera (DC)
24. Western Opera Theater (San Francisco)

Ford Foundation Stabilization Grants III - Theater (3 folders),
1984-1988

box 51

folder
418-419

Scope and Contents

box 52

folder 420

Tab Index:

1. A Contemporary Theater (Seattle)
2. Acting Company (NYC)
3. Actor Theatre of Louisville (KY)
4. American Conservatory Theater

5. American Place Theatre (NYC)
6. American Shakespeare Theatre
7. Arena Stage (DC)
8. Arizona Theatre Company
9. Asolo State Theatre (FL)
10. Center Stage (Baltimore)
11. Cincinnati Playhouse in the Park
12. Circle in the Square (NYC)
13. Circle Repertory Company (NYC)
14. Cleveland Play House
15. Eugene O'Neill Theater Center
16. Folger Theatre Group (DC)
17. Guthrie Theater
18. Hartford Stage Company
19. Indiana Repertory Theatre
20. Long Wharf Theatre
21. Manhattan Theatre Club
22. Mark Taper Forum
23. McCarter Theatre (NJ)
24. Negro Ensemble Company
25. New Federal Theatre (NYC)
26. Oregon Shakespeare Festival
27. PAF Playhouse
28. Playwrights Horizons (NYC)
29. St. Louis, Repertory Theatre of
30. St. Nicholas Theater Company
31. Seattle Repertory Theatre
32. Stage West (MA)

33. Studio Arena Theatre (Buffalo)

34. Trinity Square Repertory Company

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Education and Culture Program, 1956-1985

Biographical / Historical

The Ford Foundation Education and Culture program was established in September 1981 to focus on five problem areas: the quality of teaching, the quality and content of scholarship, equity issues, cultural vitality and preservation, and policy analysis and dissemination.

| Title/Description | Instances | |
|---|-----------|------------|
| Education and Culture Program - FY 84 Grants in the Arts and 1984 Budget Projections, 1980-1984 | box 52 | folder 421 |
| Education and Culture Committee, 1982 March | box 52 | folder 422 |

Scope and Contents

Sections include:

I. Education and Culture Preliminary Program Outline

II. The Stabilization Strategy

III. Cultural Preservation and Vitality The New Delhi Office

| | | |
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| Education and Culture - Consultants and Terms, 1981-1983 | box 55 | folder 459 |
| <u>Conditions Governing Access:</u> | | |
| Conditions Governing Access | | |
| Confidential material | | |

| | | |
|--|--------|------------|
| Education and Culture Committee: A Supplement to Part II - Results, 1982 March | box 52 | folder 423 |
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Scope and Contents

Includes:

The Stabilization Strategy: An Interim Report, 1972-1980

Mellon Symphony Orchestra Program: An Interim Report, 1972-1980

Ford National Program for Symphony Orchestras: A Final Report, 1966-1976

Stabilization Program: Summary Status Report and
Financial Highlights, August 31, 1981

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|--|--------|----------------|
| Proposed Budget for Fiscal Years 1984-85, 1983 June | box 52 | folder 424 |
| The Arts Program, Information Paper for the Trustees Committee on Education and Public Policy, 1980 March | box 52 | folder 425 |
| The Education and Culture Program's Work in the Arts, Discussion Paper, For Discussion at the September 1985 Trustees' Meeting, 1985 October | box 52 | folder 426 |
| The Education and Culture Program's Work in Higher Education: An Appraisal of the Issues and a Prospectus for Action, For Discussion at the December 1984 Trustees' Meeting, 1984 December | box 52 | folder 427 |
| Ford Foundation Office of the Arts - Activities in Greece - Grants to Organizations, Travel and Study Awards, 1978 December 31 | box 52 | folder 428 |
| Activities in the Creative and Performing Arts Visual Arts (1957-1980), 1980 September 30 | box 52 | folder 429 |
| "All Our Ways and Means of Work --": A Discussion Paper Prepared for the Board of Trustees by Merrimon Cuninggim, Advisor, and "Summaries of Major Reports and Selected Memoranda by Merrimon Cuninggim and Mary Brucker" (2 copies), 1975 March | box 52 | folder 430-431 |
| Education and Culture Committee, 1982 March | box 52 | folder 432 |
| Scope and Contents | | |
| I. Education and Culture Preliminary Program Outline | | |
| II. The Stabilization Strategy | | |
| II. Cultural Preservation and Vitality The New Delhi Office | | |
| Discussion Paper - The Stabilization Strategy: A Proposed Private Sector Initiative for the 1980's, Education and Culture Program (2 copies), 1982 December | box 52 | folder 433-434 |
| Discussion Paper - Education and Culture: Excellence and Equity for the 1980s and Beyond, 1982 November | box 53 | folder 435 |
| Education and Culture Committee - A Supplement to Part II - Results, 1982 March | box 53 | folder 436 |
| Discussion Paper - The Stabilization Strategy: A Proposed Private Sector Initiative for the 1980's, Education and Culture Program, 1982 November | box 53 | folder 437 |
| Education and Culture - FY 1982 Grants, Projects and Program-Related Investments Out of Appropriation and Delegated Authority Program (DAP), 1980-1982 | box 53 | folder 438 |
| Education and Culture Records H8 (27) - Arts Program Activities - FY 83 Ending 9/30 - Modification and Summary, 1982-1983 | box 53 | folder 439 |

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| Education and Culture Records H8 (27) - Requests for Grant Action (RGAs) No. 676E - Support for Program Activities in the Arts FY 83, 1982-1983 | box 53 | folder 440 |
|---|--------|------------|

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|--|--------|----------------|
| Education and Culture Records H8 (27) - Requests for Grant Action (RGAs) No. 6790 - Special \$3.3 Million Arts Appropriations (2 folders), 1982-1983 | box 53 | folder 441-442 |
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Scope and Contents

Grantees:

Small Grants Arts Delegated Authority Program (DAP)

The Acting Company

National Theatre of the Deaf

Theatre Communications Group

Yale University

American Assembly

National Arts Stabilization Fund

Brooklyn Academy of Music

School of American Ballet

Joffrey, The Foundation for the

Dance Theatre of Harlem

The Art Museum Association

Peabody Institute

New York Public Library

| | | |
|---|--------|----------------|
| Education and Culture Records H8 (27) - Delegated Authority Program (DAP) - 928-0204-150 - Small Grants Arts (2 folders), 1982-1983 | box 53 | folder 443-444 |
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Scope and Contents

Grantees:

La Mama

Pedro Santaliz

Women's Interart Center

National Poetry Series

California State University, Chico

Elizabeth Swados

Rhode Island School of Design

City Center of Music and Drama

Meet the Composer

Clearinghouse for Arts Information

National Opera Institute

Davis and Elkins College

Dance Perspectives

Dance Notation Burea

American Theatre Association

Research Foundation of the State U. of NY

Fund for Artists' Colonies

| | | |
|--|--------|----------------|
| Education and Culture Program Budget, DAP Budget, RGAs, DAGs - FY 82 Summary and Modifications, 1981-1982 | box 54 | folder 445 |
| Education and Culture Program Budget, DAP Budget, RGAs, DAGs - FY 82 Requests for Grant Action (RGAs) No. 676E - Support for Program Activities in the Arts (2 folders), 1981-1982 | box 54 | folder 446-447 |

Scope and Contents

Grantees:

American Place Theatre, Inc.

Artisans Cooperative (PRI Commitment Fees)

Columbia University

Alternate Roots, Inc.

Kitani Foundation

Arizona Theatre Company

Baltimore Opera Company

Connecticut Player/Long Wharf

Hartford Stage

Opera Festival/Lake George

Opera Theatre of St. Louis

Washington Drama (sp?) Society/Arena

International Theatre Institute

Mabou Mines

Ballet Theatre Foundation

Michigan Operat Theatre

New York School for Circus Arts

North Carolina School of the Arts Foundation

Education and Culture Program Budget, DAP Budget, RGAs,
DAGs - FY 82 Requests for Grant Action (RGAs) No. 6790, 1982

box 54

folder 448

Scope and Contents

Grantee:

Shakespeare and Co.

Education and Culture Program Budget, DAP Budget, RGAs,
DAGs - Delegated Authority Grants (DAG) 829-0204-150 -
Support for Small Program Actions, 1981-1982

box 54

folder 449

Scope and Contents

Grantee:

American Theatre Association

The Trustees of the University of Pennsylvania

Kuumba Theatre, Inc.

La Mama Experimental Theatre Club

The Eakins Press Foundation

Holy Names College

American Theatre Association

Education and Culture Program Budget, DAP Budget, RGAs,
DAGs - Delegated Authority Grants (DAGs) 779-0820-350 -
Program for Small Program Actions, 1981-1982

box 54

folder 450

Scope and Contents

Grantees:

Eugene O'Neill Memorial Theater

Leland Stanford Junior University

San Francisco Redevelopment Regency

Nation Institute

Los Angeles Actors' Theatre Foundation

Artists of Indian America

Jerry L. Jaccard

New York University

| | | |
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| Ford Regular Budget - Grants and Out of Appropriation by Years, 1957-1981 | box 54 | folder 451 |
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| Ford Programs - School of American Ballet (SAB) Site Visits, 1973-1977 | box 54 | folder 452 |
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Scope and Contents

Folder is separated into testimonials/reports/correspondence of:

Mrs. Janet Reed Erskine

Mrs. Sonja Lindgren

Mr. Robert Lindgren

Mrs. Maria T. Paschen

Mrs. Barbara Weisberger

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|---|--------|------------|
| Ford Programs - Administrative Interns, Catalogues, College Grants, Symphony Orchestra (2 folders), 1956-1985 | box 54 | folder 453 |
| | box 55 | folder 454 |

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