

**NORTH CAROLINA CENTER FOR
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*For more information, call Tom Mather at the
Center at (919) 832-2839. Due to the Thanksgiving
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ARTS ENJOY STRONG SUPPORT IN N.C., DESPITE FEDERAL CUTBACKS

Arts groups in North Carolina have benefited from growing financial support in recent years, despite dwindling federal funds, a new study by the N.C. Center for Public Policy Research shows. Increased arts funding from the state, local governments, and private sources has offset large cuts in grants from the National Endowment for the Arts since 1990, according to the study released today in the Center's magazine, *North Carolina Insight*.

"North Carolina has lived up to its reputation as the 'State of the Arts,'" says Tom Mather, associate editor of *Insight* and author of the study. "The arts are thriving due to steady support from the state legislature, cities and counties, foundations, corporations, and individual donations. But many arts groups could face troubles if state and local governments follow the federal lead in slashing funding for the arts."

Cutbacks in federal spending already could be starting a ripple effect in other levels of government. From 1991 to 1996, 28 state legislatures -- including North Carolina's -- cut funding for their lead state arts agencies. Total funding for state arts agencies dropped 12 percent during that period, or 23 percent when adjusted for inflation. Funding cutbacks exceeded 30 percent in 11 states -- Alaska, Hawaii, Illinois, Maine, Montana, New York, Rhode Island, Tennessee, Utah, Virginia, and West Virginia.

In North Carolina, the General Assembly cut funding during that five-year period for the state's lead arts agency, the N.C. Arts Council, by 1 percent (or 14 percent when adjusted for inflation). The legislature in 1995 also abolished the Artworks for State Buildings Program, which had required that a small portion (0.5 percent) of the construction costs for new state buildings be set aside for public art projects. Plus, a number of cities and counties have cut funding for local arts councils and united arts funds since 1991.

"Despite cutting funds to the lead arts agency, state government has increased its overall spending on the arts by 40 percent since 1991," Mather says. "But the legislature increasingly has funneled its arts spending into pork-barrel grants to arts groups in legislators' districts, rather than to statewide arts programs."

The Center's study, published in the November issue of *Insight*, looks at trends in funding for the arts in North Carolina since 1980, focusing particularly on the past five years. The study analyzes government records on funding for artists and arts groups from the National Endowment for the Arts, the

N.C. General Assembly, and city and county governments across the state. It also looks at publicly available records on private contributions from foundations, corporations, and individuals. These records show several key trends in North Carolina:

* **Federal** support from the National Endowment for the Arts (NEA) to North Carolina groups dropped by more than half -- from \$2.8 million in Fiscal Year (FY) 1990 to \$1.3 million in FY 1995, a decline of 54 percent. The NEA's share of total government funding for the arts in North Carolina dropped from 18 percent in 1990 to 6 percent in 1995. Although federal funding accounts for a small portion of the total support from all levels of government, NEA grants play an important role in generating funds because recipients are required to obtain matching contributions from other sources.

* **State** funding from the N.C. General Assembly increased from \$10.1 million in FY 1991 to \$14.1 million in FY 1996, an increase of 40 percent. However, most of the growth in state funding has come in the form of special appropriations, or direct legislative grants to local arts groups, rather than increased funding to state arts agencies. Such pork-barrel funding for local arts groups grew from \$48,500 in FY 1991 to more than \$3 million in FY 1996, an increase of 6,186 percent.

* **Local government** funding for the arts more than doubled -- from \$3.1 million in FY 1990 to \$7.1 million in FY 1995, an increase of 123 percent. However, much of the increase in local funding has occurred in just a few metropolitan areas, such as Charlotte, Raleigh, and Fayetteville.

* **Private foundations** boosted their grants to arts groups from \$11.3 million in 1991 to \$12.9 million in 1994 -- an increase of 14 percent, or 5 percent when adjusted for inflation. Independent foundations accounted for 63 percent of those grants, followed by corporate foundations (25 percent) and community foundations (12 percent).

* **United arts funds** in 10 of North Carolina's larger metropolitan areas raised funds totaling \$15.4 million in FY 1994 -- a 37-percent increase since FY 1991, or 26 percent when adjusted for inflation. Support for **local arts councils**, based on a sample of 15 groups in smaller communities across the state, has been less steady -- growing just 7 percent from FY 1991 to FY 1994, but dropping 2 percent in inflation-adjusted dollars.

Cuts in Federal Funding

Public funding for the arts has come under increasing scrutiny in recent years, particularly at the national level, due to the federal budget deficit and controversies over some artwork funded by federal grants. Such concerns led Congress to cut funding for the National Endowment for the Arts (NEA) by nearly 40 percent in FY 1996. Republican leaders in the U.S. House of Representatives have pledged to eliminate all NEA funding by 1998.

The loss of NEA money has been felt both in the number of grants as well as the size of grants. From 1990 to 1995, the total number of NEA grants awarded in North Carolina dropped by a third, from 63 to 42. Meanwhile, the average grant amount declined from \$44,607 to \$30,935 during that span.

One group that faced a large cut in NEA funding was the African-American Dance Ensemble, a Durham-based group that stages performances based on African tribal dances, music, and costumes. The NEA cut its funding in half, from \$77,400 in FY 1992 to \$39,000 in FY 1995, forcing the group to scale back its performances in schools and small communities across the state.

"The NEA is allowing us to subsidize our fees so that school systems can have us in and augment their educational programs," says Rodney Trapp, executive director of the Ensemble. "When you take that away, you hurt young people. ... We know the important role that the arts play in a community, and we know the impact that the cutbacks will have."

Other arts groups that had large cutbacks in NEA funding from 1990 to 1995 include: in Charlotte, N.C. Dance Theater and Opera Carolina; in Durham, the American Dance Festival and the Durham Arts Council; in Greensboro, the Eastern Music Festival and the Greensboro Symphony Society; in Raleigh, the N.C. Symphony Society; and in Winston-Salem, the Reynolda House and Southeastern Center for Contemporary Art.

State Funding for the Arts

The state contributes the largest share of public funding for the arts in North Carolina, accounting for nearly two-thirds (62 percent) of the total government support in FY 1995. The N.C. General Assembly's overall funding for the arts rose from \$10.1 million in FY 1991 to \$14.1 million in FY 1996 -- an increase of 40 percent, or 18 percent when adjusted for inflation.

However, most of the recent growth in state arts funding has come from large increases in special appropriations -- or direct, non-recurring legislative grants to specific arts groups or projects. With such "pork barrel" grants, legislators can earmark funds for arts groups in their districts instead of going through the N.C. Arts Council's administrative process for distributing grants around the state. For example, in FY 1995, legislators approved special appropriations ranging from \$2,000 for the Burnsville Playhouse in Yancey County to \$100,000 for the Brevard Music Center in Transylvania County. This funding shift has several implications:

- * State funding for the arts has become more of a political process as the legislature has exerted more control over the allocation of state money to local arts groups, programs, and events.

- * Much of the state funding for local arts groups is bypassing the review process of the N.C. Arts Council, which was established to ensure a fair and accountable distribution of the state's arts spending.

- * State funding for the arts has become more dependent on non-recurring, annual legislative appropriations, making it difficult for nonprofit arts groups to plan ahead financially.

- * Special appropriations do not stimulate as much giving from other sources as do grants from the N.C. Arts Council, which generally requires recipients to obtain matching funds from other contributors.

"We try not look a gift horse in the mouth," Mary Cook, director of public affairs for the N.C. Department of Cultural Resources, says of the special appropriations. "Whatever hassles come along the way, we're grateful to have this money."

Others are more critical of the shift in funding priorities, saying that the N.C. Arts Council allocates funds more fairly than does the legislature in its pork-barrel appropriations. "You can't dispute that the state has increased its support for the arts, including at the local level," says Rob Maddrey, president of Arts North Carolina, which represents local arts groups across the state. "But the amount of money is largely dependent on who you know and how it's doled out by the legislature."

Local Government Funding for the Arts

One of the Center's surprising findings was the large growth in local government support for the arts. Cities and counties more than doubled their funding to local arts councils, from \$3.2 million in FY 1990 to \$7.1 million in FY 1995 -- an increase of 123 percent, or 89 percent when adjusted for inflation. In FY 1995, local governments accounted for nearly a third (32 percent) of the total arts funding from all levels of government, up from 20 percent in FY 1990.

These data show local governments have shouldered much of the funding increase for arts groups across the state. Observers credit much of that growth to improving relations between arts groups and city and county governments. "It's easier to find champions for your local arts groups in local governments because they're your next-door neighbors in many cases," says Rob Maddrey of Arts North Carolina.

The outlook for local support is not all rosy, however, as much of the increase has been concentrated in a few metropolitan areas. In particular, the Arts & Science Council of Charlotte and Mecklenburg County accounted for more than half (56 percent) of the total city and county funding for all local arts councils in the state in FY 1995. From 1991 to 1995, local government support increased by 337 percent for the Charlotte council, 325 percent for the United Arts Council of Raleigh and Wake County, and 391 percent for the Arts Council of Fayetteville and Cumberland County.

However, more than half (13 of 25) of the local arts councils and united arts funds that the Center studied received *less* support from local governments in 1995 than they did in 1991. Groups that had declines in local government funding during that period (in absolute terms) include the: United Arts Council of Gaston County (-75 percent), United Arts Council of Greensboro (-60 percent), Moore County Arts Council (-40 percent), Caldwell Arts Council (-22 percent), Alamance County Arts Council (-21 percent), Stanly County Arts Council (-20 percent), Union County Arts Council (-17 percent), Arts Council of Winston-Salem (-17 percent), and Arts Council of Wilson (-16 percent).

Private Support for the Arts

Nationwide studies show private sources donate about \$9 to the arts for every \$1 in government funding. But data on private giving are hard to compile due to the lack of available records. The Center gauged private giving by examining two key data sources: publicly available tax records filed by private foundations and budgets for local arts councils and united arts funds. These sources show that private giving to the arts has increased steadily in North Carolina, although not as much as government funding.

Foundation giving to the arts in North Carolina totaled \$12.9 million in 1994, about the same as the state funding for the arts that year. But foundation giving grew by only 14 percent from 1991 to 1994 -- half as much as the increase in state funding over that period. In 1991, more than a third (39 percent) of the 749 foundations based in North Carolina contributed to the arts, with those donations accounting for 5 percent of the total foundation grant dollars awarded that year.

The largest foundation contributors to the arts in 1994 were: among independent foundations, the A.J. Fletcher Foundation of Raleigh, which gave \$1,497,350; among corporate foundations, the Wachovia Foundation of Winston-Salem, which gave \$608,050; and among community foundations, the Foundation For The Carolinas in Charlotte, which gave \$679,471.

The Center also surveyed **corporations** with a history of supporting the arts in North Carolina to

find out about changes in their giving patterns. Of the companies that responded, leading corporate funders of the arts include: Glaxo Wellcome, which donated \$440,800 to the arts in 1994; DuPont, which gave \$54,300 in 1994; and Philip Morris USA, which donated \$29,000 in 1994.

Private donations also grew modestly at **local arts councils** and **united arts funds** in the state. From 1990 to 1994, total private giving and revenue increased by 14 percent at the 15 local arts councils and by 20 percent at the 10 united arts funds studied by the Center. Individual giving grew at a much higher rate than contributions from corporations and foundations.

“Private donations, although a large source of income for arts groups, are not likely to make up for cutbacks in government funding,” Mather says. “Nationwide, private contributions to the arts have been leveling off since the early 1990s. Plus, arts groups are having to compete for donations with other types of nonprofit organizations facing similar government cutbacks.”

The N.C. Center for Public Policy Research is an independent, nonpartisan, nonprofit corporation created to study public policy issues facing North Carolina and to evaluate state government’s performance. The Center’s study of funding for the arts is a followup to its 1983 study of the arts in North Carolina, its 1982 report on the impact of the 1981 federal budget cutbacks in the state, and its 1985 directory to corporate and foundation giving. The new arts study was supported by grants from the Governor’s Business Council on the Arts & Humanities, The Mary Duke Biddle Foundation of Durham, and the Weaver Foundation of Greensboro. The Center also receives major grant support from the Z. Smith Reynolds and Mary Reynolds Babcock Foundations, both in Winston-Salem. Other funding comes from 14 private foundations, 190 corporate contributors, and more than 900 individual and organizational members.

In addition to *North Carolina Insight* magazine, the Center publishes book-length research reports. Recent reports include *North Carolina Focus*, an anthology on state government, politics, and policy, and *Article II*, a citizens’ guide to the N.C. General Assembly. Other recent studies by the Center have examined the changing relationship between state and local governments, school choice, minority health, and the North Carolina Railroad.

Copies of the November issue of *Insight* magazine containing the 65-page study of arts funding can be obtained from the Center for \$8 plus \$3.50 for postage, handling, and sales tax. To order, call (919) 832-2839, fax to (919) 832-2847, write to the N.C. Center for Public Policy Research at P.O. Box 430, Raleigh, NC 27602, or visit our Website at <http://www.nando.net/insider/nccppr>.

North Carolina's Firsts as the "State of the Arts"

North Carolina has a long history of supporting the arts and a nationwide reputation that continues to this day. In 1815, the state legislature spent \$10,000 to commission a statue of George Washington for the State Capitol Building. In the 1920s and 1930s, private citizens established groups that eventually led to the creation of the state art museum and state symphony. Since then, the state can claim a number of "firsts" showing its support for the arts:

- * In 1943, the N.C. Symphony, although formed with private money in 1932, became the nation's first state-supported symphony orchestra.

- * In 1947, North Carolina became the first state to fund a public collection of art -- now the N.C. Museum of Art.

- * In 1949, private citizens founded the Arts Council of Winston-Salem, the first organization of its kind in the nation.

- * In 1963, the state legislature established the N.C. School of the Arts, the first state-supported residential school for the performing arts in the nation.

- * In 1971, the legislature created the nation's first cabinet-level state agency for arts and culture, now known as the Department of Cultural Resources.

- * In 1977, the legislature funded the N.C. Arts Council's Grassroots Arts Program, the nation's first program for funding local arts initiatives on a per-capita basis.

North Carolina also was among the first states to establish a statewide agency for promoting the arts. Former Gov. Terry Sanford established the N.C. Arts Council by executive order in 1964, and the state legislature made it a statutory agency in 1967. In 1971, the Council became part of the newly created Department of Art, Culture, and History -- now known as the Department of Cultural Resources -- and it became a full division of the department in 1981.

"North Carolina has the most united arts funds of any state in the country," says Oscar E. Marin, director of the National Coalition of United Arts Funds in New York. "North Carolina has some of the most successful funds too, especially for the Southeastern U.S."

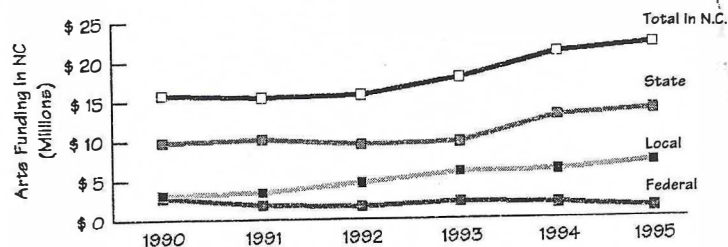
**Table 2. Legislative Appropriations for State Arts Agencies,
FY 1991-96**

State	FY 1991	FY 1996	Percent Change, 1991-96	Inflation Adjusted Change, 1991-96	State Per Capita Spending, 1996	Rank in Per Capita Spending, 1996
Alabama	\$1,578,774	\$2,008,432	27.2%	11.2%	\$0.48	39
Alaska	1,431,800	564,000	-60.6	-65.6	0.93	18
Arizona	2,067,800	2,590,000	25.3	9.5	0.61	30
Arkansas	972,702	1,275,532	31.1	14.6	0.51	36
California	15,736,000	12,496,000	-20.6	-30.6	0.40	48
Colorado	1,536,172	1,691,077	10.1	-3.8	0.45	42
Connecticut	2,197,217	3,150,185	43.4	25.3	0.96	15
Delaware	1,361,390	1,307,900	-3.9	-16.0	1.82	5
Florida	26,528,509	26,293,366	-0.9	-13.4	1.86	4
Georgia	3,385,294	4,396,670	29.9	13.5	0.61	31
Hawaii	19,600,963	6,122,649	-68.8	-72.7	5.16	1
Idaho	665,400	836,500	25.7	9.9	0.72	25
Illinois	11,233,100	5,543,200	-50.7	-56.9	0.47	40
Indiana	2,811,820	3,002,971	6.8	-6.7	0.52	35
Iowa	1,249,273	1,407,124	12.6	-1.6	0.50	37
Kansas	1,071,659	1,343,043	25.3	9.5	0.52	34
Kentucky	3,367,200	3,308,100	-1.8	-14.1	0.86	20
Louisiana	936,328	4,176,000	346.0	289.8	0.96	16
Maine	755,125	513,389	-32.0	-40.6	0.41	46
Maryland	8,522,216	7,625,642	-10.5	-21.8	1.51	10
Massachusetts	15,224,000	14,162,525	-7.0	-18.7	2.33	2
Michigan	11,520,300	21,734,700	88.7	64.9	2.23	3
Minnesota	5,553,107	7,155,000	28.8	12.6	1.55	9
Mississippi	514,437	1,323,295	157.2	124.8	0.49	38
Missouri	4,480,026	8,522,600	90.2	66.3	1.60	8
Montana	781,129	540,731	-30.8	-39.5	0.62	28
Nebraska	1,047,932	1,272,450	21.4	6.1	0.78	21
Nevada	359,308	701,027	95.1	70.5	0.46	41
New Hampshire	518,539	486,093	-6.3	-18.1	0.42	44
New Jersey	11,703,000	13,657,000	16.7	2.0	1.72	7
New Mexico	1,119,000	1,760,167	57.3	37.5	1.04	13
New York	50,980,900	31,687,000	-37.8	-45.7	1.75	6
North Carolina	5,427,589	5,410,954	-0.3	-12.9	0.75	23
North Dakota	274,185	288,309	5.2	-8.1	0.45	43
Ohio	12,129,849	11,536,596	-4.9	-16.9	1.03	14
Oklahoma	3,195,455	3,138,037	-1.8	-14.2	0.96	17
Oregon	1,536,549	1,142,323	-25.7	-35.0	0.36	49
Pennsylvania	11,704,000	9,100,000	-22.2	-32.0	0.75	22
Rhode Island	1,021,732	626,562	-38.7	-46.4	0.63	27
South Carolina	3,932,925	3,361,661	-14.5	-25.3	0.92	19
South Dakota	404,527	450,116	11.3	-2.8	0.62	29
Tennessee	5,804,300	3,009,850	-48.1	-54.7	0.57	32
Texas	3,386,072	3,316,170	-2.1	-14.4	0.18	50
Utah	6,583,600	2,442,500	-62.9	-67.6	1.25	11
Vermont	479,153	430,000	-10.3	-21.6	0.74	24
Virginia	4,016,007	2,668,552	-33.6	-41.9	0.40	47
Washington	2,396,322	2,264,373	-5.5	-17.4	0.42	45
West Virginia	3,693,180	2,060,475	-44.2	-51.2	1.13	12
Wisconsin	2,436,800	2,693,300	10.5	-3.4	0.53	33
Wyoming	350,705	331,562	-5.5	-17.4	0.69	26
National Totals	\$279,583,370	\$246,925,708	-11.7%	-22.8%	\$0.99	n/a

Source: National Assembly of State Arts Agencies, "State Arts Legislative Appropriations—Annual Survey," NASAA, Washington, D.C., 1991-1996 editions, (page number varies).

Note: Legislative appropriations are for designated state art agencies only, such as the N.C. Arts Council. Thus, the total for North Carolina does not include special legislative appropriations for arts groups, which totaled \$3.05 million in FY 1996.

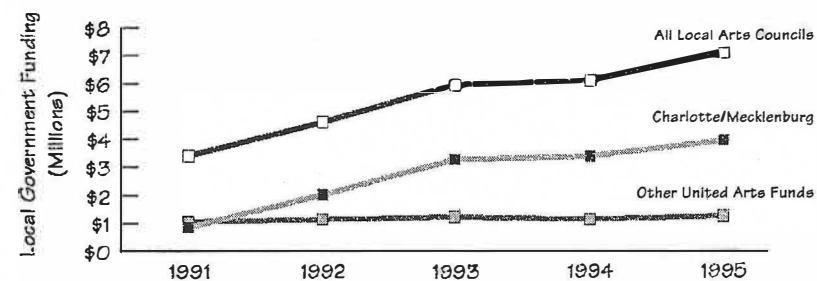
Table 4. Total Government Funding for the Arts in North Carolina, FY 1990-1995



Level of Government	Fiscal Year End						Percent of Total in 1995	Percent Change 1990-95	Inflation Adjusted Change
	1990	1991	1992	1993	1994	1995			
Local	\$3,164,427	\$3,437,730	\$4,615,256	\$5,932,879	\$6,087,138	\$7,064,861	32.2%	123.3%	88.5%
State	9,770,227	10,128,155	9,452,875	9,708,015	12,922,295	13,590,329	61.9	39.1	17.5
Federal	2,810,253	1,838,775	1,624,150	2,158,564	1,916,789	1,299,286	5.9	-53.8	-61.0
TOTAL	\$15,744,907	\$15,404,660	\$15,692,281	\$17,799,458	\$20,926,222	\$21,954,476	100.0%	39.4%	17.7%

Note: Local includes all funding of local arts councils by counties and municipalities in N.C. State includes legislative appropriations for the N.C. Arts Council, Museum of Art, Symphony, and special funding for local art groups in N.C. Federal includes all National Endowment for the Arts grants to artists and art groups in N.C.

Table 6. Local Government Funding for the Arts in Charlotte vs. Other Areas in North Carolina (Millions of Dollars)

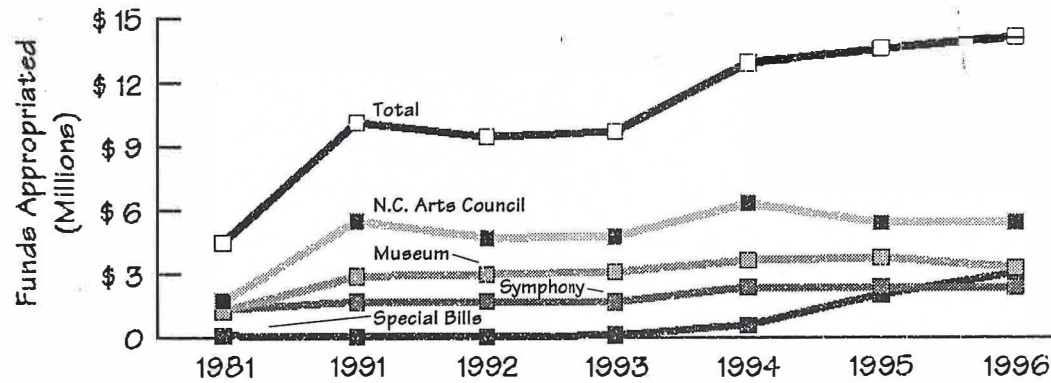


Local Government Funding	1991	1992	1993	1994	1995
Charlotte/Mecklenburg	\$0.905	\$2.050	\$3.284	\$3.397	\$3.956
Other United Arts Funds	1.104	1.172	1.255	1.180	1.286
All Local Arts Councils	3.438	4.615	5.933	6.087	7.065
Charlotte/Mecklenburg % of Total Local Funding for Arts Councils	26.3%	44.4%	55.4%	55.8%	56.0%

Source: N.C. Arts Council, surveys of local government funding of community arts councils and commissions in North Carolina, 1991-95.

Note: The increase in local government support for the arts in Charlotte is not as large as suggested by the growth in funding for the Arts & Science Council from FY 1991-95. That's because the Charlotte City Council shifted from directly funding a number of local groups, such as the Mint Museum, to indirectly funding those groups through the Arts & Science Council starting in FY 1992. Thus, the city shifted about \$1.6 million a year to the Arts & Science Council from a number of arts groups that previously had received direct funding. The arts groups still receive funding, however, but it comes through the Arts & Science Council rather than the city council.

**Table 5. Legislative Funding for State Arts Programs
in North Carolina, FY 1981-96**



"A system that produces \$2 million to \$3 million a year for arts organizations can't be all bad. But the distribution of money could be done more equitably."

AL ADAMS, LOBBYIST FOR ARTS
ADVOCATES OF N.C. AND FORMER WAKE
COUNTY STATE REPRESENTATIVE

State Arts Programs	1981	1991	1992	1993	1994	1995	1996	Percent of Total in 1996	Percent Change, 1991-96	Inflation Adjusted Change, 1991-96	State Arts Programs
N.C. Arts Council	\$1,744,822	\$5,476,590	\$4,705,816	\$4,765,494	\$6,303,256	\$5,396,381	\$5,410,954	38.3%	-1.2%	-13.6%	N.C. Arts Council
N.C. Museum of Art	1,286,322	2,902,146	2,988,124	3,106,349	3,636,982	3,763,488	3,295,070	23.3	13.5	-0.8	N.C. Museum of Art
N.C. Symphony	1,353,310	1,700,920	1,710,435	1,707,673	2,383,557	2,381,960	2,380,973	16.8	40.0	22.3	N.C. Symphony
Special Bills	112,405	48,500	48,500	128,500	598,500	2,048,500	3,048,500	21.6	6185.6	5493.6	Special Bills
TOTAL	\$4,496,859	\$10,128,156	\$9,452,875	\$9,708,015	\$12,922,295	\$13,590,329	\$14,135,497	100.0%	39.6%	22.0%	TOTAL

Source: N.C. Department of Cultural Resources. Special Bills include all legislative special appropriations for local art groups in the state.

Table 17. Largest Private Independent Foundation Donors to the Arts in North Carolina, 1988-94

Name of Foundation	Arts Giving in N.C.				Percent Change, 1988-94	Arts as % Total Giving
	1988	1991	1994	3-Year Total		
1 A.J. Fletcher Fdn.	\$1,234,917	\$1,285,741	\$1,497,350	\$4,018,008	21.3%	54.7%
2 Mary Duke Biddle Fdn.	426,392	482,416	526,946	1,435,754	23.6	67.2
3 Alex Shuford Fdn.	224,502	137,450	934,500	1,296,452	316.3	100.0
4 C.D. Spangler Fdn.	0	214,800	605,000	819,800	N/A	12.5
5 Cannon Fdn.	370,046	371,000	76,000	817,046	-79.5	5.8
6 Kellenberger Historical Fdn.	201,065	243,270	359,633	803,968	78.9	83.8
7 J.G. Hanes Memorial Fdn.	383,250	403,000	N/A	786,250	N/A	88.2
8 Z. Smith Reynolds Fdn.	96,000	377,500	302,250	775,750	214.8	2.7
9 John W. & Anna H. Hanes Fdn.	140,000	253,834	244,274	638,108	74.5	30.2
10 J.G. Hanes Memorial Fund	80,000	14,000	540,000	634,000	575.0	42.5
11 Janirve Fdn.	207,205	407,500	N/A	614,705	N/A	15.9
12 W.R. Kenan Fund for the Arts	N/A	N/A	579,858	579,858	N/A	100.0
13 Mary Reynolds Babcock Fdn.	88,655	95,510	380,000	564,165	328.6	5.3
14 W.R. Kean Charitable Trust	0	500,000	0	500,000	N/A	2.2
15 First Gaston Fdn.	324,500	8,125	59,500	392,125	-81.7	22.9
16 Blumenthal Fdn.	58,455	169,870	107,330	335,655	83.6	11.3
17 Hillsdale Fund	143,200	64,800	97,750	305,750	-31.7	11.1
18 The News & Observer Fdn.	131,204	93,956	62,517	287,677	-52.4	24.0
19 Kathleen Price Bryan Family Fdn.	0	236,100	47,500	283,600	N/A	6.5
20 Broyhill Family Fdn.	120,750	66,900	88,933	276,583	-26.3	6.6
TOTALS	\$2,995,224	\$4,140,031	\$5,011,991	\$12,147,246	67.3%	13.4%

Sources: Data on foundation giving compiled from publicly available 990-PF tax forms and annual reports of foundations for the years 1988, 1991, and 1994. Data for 1988 and 1991 adapted from Anita Gunn Shirley, *North Carolina Giving*; 1990 and 1993 Editions, Capital Consortium, Raleigh, N.C.

Table 18. Largest Corporate Foundation Donors to the Arts in N.C., 1988-94

Name of Corporate Foundation	Arts Giving in N.C.				Percent Change, 1988-94	Arts as % Total Giving
	1988	1991	1994	3-Year Total		
1 Duke Power Co. Fdn.	\$348,819	\$996,533	\$394,941	\$1,740,293	13.2%	10.4%
2 First Union Fdn.	552,148	489,356	256,716	1,298,220	-53.5	9.2
3 Wachovia Fdn.	127,834	227,083	608,050	962,967	375.7	12.7
4 Dickson Fdn.	58,900	155,850	257,800	472,550	337.7	13.6
5 RJR Nabisco Fdn.	127,793	N/A	285,000	412,793	123.0	1.9
6 Philip Van Every Fdn.	154,500	98,000	72,500	325,000	-53.1	7.7
7 Glaxo Wellcome Fdn.	0	0	250,000	250,000	N/A	9.8
8 Royal Insurance Fdn.	N/A	110,500	134,575	245,075	N/A	29.0
9 Jefferson-Pilot Fdn.	0	115,400	123,000	238,400	N/A	6.6
10 Belk Fdn.	35,000	58,000	96,500	189,500	175.7	6.2
11 CCB Fdn.	50,183	38,250	54,500	142,933	8.6	15.1
12 Lance Fdn.	24,500	81,000	29,500	135,000	20.4	9.4
13 National Gypsum Fdn.	N/A	N/A	124,600	124,600	N/A	53.8
14 Pepsi-Cola of Charlotte Fdn.	25,000	41,990	41,200	108,190	64.8	45.1
15 Barclays Bank Fdn.	38,250	45,650	10,500	94,400	-72.5	10.5
TOTALS	\$1,194,108	\$1,461,079	\$2,344,441	\$4,999,628	96.3%	7.7%

Sources: Data on foundation giving compiled from publicly available 990-PF tax forms filed by foundations for the years 1988, 1991, and 1994. Data for 1988 and 1991 adapted from Anita G. Shirley, *North Carolina Giving*, 1990 and 1993 Editions, Capital Consortium, Raleigh, N.C. Data not available for 1994 giving for the Royal Insurance, Jefferson-Pilot, and CCB foundations. For those foundations only, 1994 data based on 1993 giving, which was adapted from Anita Gunn Shirley, "N.C. Corporate Giving," Capital Consortium, Raleigh, N.C., 1995.

Note: This table includes data from corporate foundations only and not contributions from corporate direct-giving programs. A number of corporations that donate money to the arts make their contributions through direct gifts rather than, or in addition to, foundation grants. However, unlike foundations, corporate direct-giving programs are not required by law to file publicly available records listing their contributions. N.C. companies that are believed to be among the largest supporters of the arts through direct-giving programs include: Carolina Power & Light, DuPont, Glaxo Wellcome, NationsBank, Philip Morris, and Sara Lee Corp.