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The relationship between endowment funds and the support of selected non-economic goals in the arts

Glenn, J. Donald, Ph.D.
The Ohio State University, 1992
THE RELATIONSHIP BETWEEN ENDOWMENT FUNDS AND THE SUPPORT OF SELECTED NON-ECONOMIC GOALS IN THE ARTS

DISSERTATION

Presented in Partial Fulfillment of the Requirements for the Degree Doctor of Philosophy in the Graduate School of The Ohio State University

By

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****

The Ohio State University

1992

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ACKNOWLEDGMENTS

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# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>ACKNOWLEDGMENTS</th>
<th>ii</th>
</tr>
</thead>
<tbody>
<tr>
<td>VITA</td>
<td>iii</td>
</tr>
<tr>
<td>LIST OF TABLES</td>
<td>vi</td>
</tr>
<tr>
<td>LIST OF FIGURES</td>
<td>vii</td>
</tr>
</tbody>
</table>

## CHAPTER

<table>
<thead>
<tr>
<th>CHAPTER</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. INTRODUCTION</td>
<td>1</td>
</tr>
<tr>
<td>Problem statement</td>
<td>3</td>
</tr>
<tr>
<td>Purpose of the study</td>
<td>3</td>
</tr>
<tr>
<td>Justification of the study</td>
<td>4</td>
</tr>
<tr>
<td>Background and setting</td>
<td>6</td>
</tr>
<tr>
<td>Constitutive definitions of terms</td>
<td>11</td>
</tr>
<tr>
<td>Objectives</td>
<td>15</td>
</tr>
<tr>
<td>Instrumentation</td>
<td>16</td>
</tr>
<tr>
<td>Hypotheses</td>
<td>21</td>
</tr>
<tr>
<td>II. LITERATURE REVIEW</td>
<td>27</td>
</tr>
<tr>
<td>The uniqueness of arts policy</td>
<td>27</td>
</tr>
<tr>
<td>The what involved in the process</td>
<td>35</td>
</tr>
<tr>
<td>The who involved in the process</td>
<td>42</td>
</tr>
<tr>
<td>How NEGs relate to economic theory</td>
<td>47</td>
</tr>
<tr>
<td>Conclusions</td>
<td>51</td>
</tr>
<tr>
<td>III. PROCEDURES</td>
<td>53</td>
</tr>
<tr>
<td>Design</td>
<td>53</td>
</tr>
<tr>
<td>Population and sample</td>
<td>54</td>
</tr>
<tr>
<td>Instrumentation</td>
<td>57</td>
</tr>
<tr>
<td>Data collection</td>
<td>62</td>
</tr>
<tr>
<td>Analysis</td>
<td>65</td>
</tr>
<tr>
<td>IV. RESULTS</td>
<td>68</td>
</tr>
<tr>
<td>V. CONCLUSIONS AND RECOMMENDATIONS</td>
<td>86</td>
</tr>
</tbody>
</table>
### LIST OF TABLES

<table>
<thead>
<tr>
<th>TABLE</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Summary of the NEGs supported by each funding source</td>
<td>2</td>
</tr>
<tr>
<td>2. Contingency analysis example</td>
<td>67</td>
</tr>
<tr>
<td>3. Contingency tables developed for data analysis</td>
<td>69</td>
</tr>
<tr>
<td>4. Mean scores of the support levels</td>
<td>81</td>
</tr>
<tr>
<td>5. Results matrix</td>
<td>85</td>
</tr>
</tbody>
</table>
## LIST OF FIGURES

<table>
<thead>
<tr>
<th>FIGURE</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Four basic areas of concerns that generate NEG$s$</td>
<td>8</td>
</tr>
<tr>
<td>2. Ages of organizations</td>
<td>71</td>
</tr>
<tr>
<td>3. Populations of cities</td>
<td>72</td>
</tr>
<tr>
<td>4. Operating budgets</td>
<td>73</td>
</tr>
<tr>
<td>5. Type of income</td>
<td>75</td>
</tr>
<tr>
<td>6. Value of endowments</td>
<td>77</td>
</tr>
<tr>
<td>7. Age of endowments</td>
<td>78</td>
</tr>
</tbody>
</table>
Arts organizations in the United States have both economic and non-economic goals. Examples of non-economic goals (NEGs) include: a) to create favorable conditions for making the arts accessible to the public, b) to support creativity in the arts, c) to strengthen the individual cultural organization, and d) to preserve the cultural heritage of the nation for present and future generations (Wahl-Zieger, 1980). These non-economic goals are more simply referred to by labels such as "access," "artistic opportunity," "organizational development," and "cultural preservation." Other NEGs as well as other labels exist. This study, however, is limited to the four NEGs mentioned above.

The pursuit of NEGs has been supported throughout the history of the arts in this country by various funding sources. Nearly a century ago, "when the private patron was all...some patrons had a second motive, the presentation or bequest of art for education and enlightenment of the citizenry" (Lowry, 1984, p. 5). Over the century, other funding sources -- foundations, public funding, and corporations -- have played a part in the support of NEGs. Today, with an increasing reliance on earned income, it is likely that even the arts organization itself plays a role in supporting NEGs.
DiMaggio (1986) posits that certain NEGs appeal to certain funding sources, that is, relationships develop between the two. For example, "corporations are more likely to provide general support or administrative aid than assistance to artistic projects," according to the Goody study (cited in DiMaggio, 1986, p. 79). Corporations fear having to explain to stockholders their support of an art project that may turn out to be controversial. Hence, corporate funding tends to favor support of organizational development over artistic opportunity. While, on the other hand, public funding tends to support a greater variety of NEGs. Table 1 summarizes these relationships as advanced by DiMaggio.

Table 1. — Summary of the NEGs supported by each funding source.

<table>
<thead>
<tr>
<th>NEGs</th>
<th>Private</th>
<th>Corporate</th>
<th>Foundational</th>
<th>Government</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellence</td>
<td>YES (in major institutions)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Conservation</td>
<td>YES (in major institutions)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Access</td>
<td>YES (in less developed institutions)</td>
<td>YES (to the Middle class)</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Innovation</td>
<td>NO</td>
<td>NO</td>
<td>SOMEWHAT</td>
<td>YES</td>
</tr>
<tr>
<td>Diversity</td>
<td>NO</td>
<td>SOMEWHAT</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Participation</td>
<td>NO</td>
<td>SOMEWHAT</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>
Problem statement

Claims made by DiMaggio stop short of considering whether relationships exist between NEGs and sources of earned income for the arts. DiMaggio considered relationships between corporate, private, foundational, and government support -- all types of unearned income. Examples of earned income are: gift shop sales, ticket sales, subscriptions, or concessions income -- all types of operating earned income; and earnings on investments, interest from endowments -- both types of non-operating earned income. One might wonder, for example, do art museums with high amounts of income from gift shop sales offer discount admission prices more so than museums without such earnings. If so, then it would seem likely that the non-economic goal "access" was important to these organizations, that a relationship exists between the support of this particular NEG and this particular type of earned income. One might also wonder, do arts organizations with high amounts of interest earned on endowment funds show support of certain NEGs while arts organizations without endowments do not.

Literature can not be found that empirically explores the relationship between NEGs and earned income sources. Hence, it has not been determined if relationships exist between any of the various NEGs and the numerous sources of earned income.

Purpose of the study

By looking into the unexplored realm of earned income, this study is an effort to add to what is known about relationships between funding sources and NEGs. At least two approaches exist to tackle this
investigation: one is a multifaceted project looking at the various sources of funding and the many NEG$s; the other is a more modest approach which limits the variables. The latter was chosen for this study. The purpose therefore of this study was to determine if a relationship exists between selected NEG$s, four in fact, and one type of earned income source commonly found within an arts organization. The earned income source chosen for this study is endowment funds, which has lately become an increasingly popular means to supplement income in arts organizations. Previous research, Glenn (1989), provides an historic overview of the use of endowments in non-profit areas, specifically the arts. For this present study, the specific research question was as follows: Is there a relationship between endowment funds and the support of selected non-economic goals -- namely access, artistic opportunity, organizational development, and cultural preservation -- in traditional arts organizations (art museums, symphony orchestras, ballet and opera companies) in this country?

Justification

Inquiry into the relationship between endowment funds and selected NEG$s is important for at least two reasons. First, some have warned that the time has come to prioritize goals.

"In this period of severe budgetary constraints, neither the nation, Congress, nor the [NEA] can continue to avoid the necessity of establishing priorities among worthy goals. Setting such priorities in arts policy is precisely what the Endowment has avoided throughout its two and a half decades of existence. Now in a political environment characterized
by static and inadequate budgets as well as an increasing
concern for values and the need to set policy priorities, the
NEA is likely to find itself in circumstances that will
eventually require it to set priorities for itself or else
face the prospect of having them set for them from
outside..." (Wyszomirski et al., 1990).

It may well be that if certain goals are not "priority" and do not
receive government support, other funding sources such as the corporate
sector or individual patron will have to either pick up the slack or
chose also not to support them. What if these other funding sources
are not inclined to support these goals? Will other types of funding
sources such as earned income sources be inclined to support these
goals?

An illustration of this quandary has surfaced in recent years out
of the brouhaha of NEA funds going to support innovative art, what some
regard as obscene or pornographic art. If public monies are not used
to fund innovation in the arts and if other sources of unearned income
are not inclined to fund innovation (as DiMaggio's findings would
suggest in Table 1), who or what then will fund innovation? It is
reasonable to imagine that a heavily-endowed art museum, for instance,
could channel its resources to this end by, for example, offering
scholarships or grants to create new works of art. It is also
reasonable, though, that there may not be this inclination, that a
relationship does not exist between this particular source of income
and this non-economic goal. At this point in time, since little is
known about the relationship between earned income sources and NEGs,
talk about what might happen is purely speculative. Knowing more about
these relationships might serve to bring light to this quandary and provide substance to future discussions.

Second, one might argue that as difficult as it has become to find support for economic goals in the arts it is as difficult to find support for non-economic goals. If the trend continues for arts organizations to rely upon earned income more and more, in effect becoming more independent, then is it not reasonable to argue their support of NEGs could also be in the process of becoming more independent. That is, arts organizations that rely very little on unearned income but heavily on earned income might have greater control as to which non-economic goals -- if any -- are supported. One might wonder, in a worse-case scenario, what would happen if an arts organization decides that its efforts to support access are too costly and discontinues its support of that non-economic goal?

Background and setting

NEGs are discussed frequently in arts administration and arts policy literature. A problem, however, exists with the terminology: NEGs are not assigned the same labels consistently throughout the literature. Note, for example, in Table 1 that DiMaggio (1986) uses a distinct set of labels to refer to NEGs. Labels such as "innovation," "excellence," "access," and "conservation" are somewhat different than the labels used in this study -- access, artistic opportunity, organizational development, and cultural preservation. Perhaps what makes discourse about NEGs possible are the common areas of concern
behind the terminology. However imaginative the labels might be, it can be argued that NEGs develop out of some basic concerns.

This point can be illustrated using a somewhat business-oriented reasoning process akin to having a producer, a consumer, a market to bring the two together, and a continuation of the exchange. It can be argued that in the arts a similar process occurs. Both tangible items (plays, paintings, symphonies, novels, etc.) and intangible items (aesthetic experiences, an arts history, critical discussions) are produced. The consumer can be the museum-goer, someone who reads a novel or listens to a piece of music. The market can be the means to bring together the producer and consumer, that is, the exchange can take place in the art museum or expansions of that such as the classroom, the community recreation room, etc. The continuity involves building upon arts experiences (for example, learning experiences such as a sequential K-12 curriculum) and by expanding the artistic lineage of the arts in general. Continuity, might be more simply explained as a continuum from past to future -- people in the past have experienced the arts, it is hoped that people in the present and future will continue to experience the arts. Figure 1 depicts this notion of having at least four basic areas of concern, which again are: a production side of the process; a consumption side; an environment to bring together the producer and consumer; and a continuation of artist, consumer, and exchange environment from past to future.

It can further be argued that numerous NEGs can develop from these areas of concern and each can be labeled as seen fit. For example, when considering the production side of this process model, both
creating new works and re-creating past works of art can be seen as non-economic goals. The labels "innovation" and "excellence" could be used respectively. "Innovation" would imply that the new work of art is unique while "excellence" would imply that the recreated work of art is top quality. A more comprehensive goal though transcends both of these other goals. In both cases, whether the artist is creating or re-creating, the artist is provided "artistic opportunity". Similarly, while "artistic opportunity" might be a broadly-conceived NEG on the production side of the process, "access" might be a broadly-conceived NEG on the consumption side, "organizational development" might be related to bringing together producer and consumer, and "cultural preservation" might be related to the continuity of all this.

---

**Figure 1.** Four basic areas of concerns that generate NEGs.
In addition to seeking broad-based NEGs for this study, another criteria for selecting NEGs was to use those which are common to different disciplines -- art, music, dance. That is, artistic opportunity is not unique to any discipline; artistic opportunity can be granted to ballet dancers as well as to opera singers or oboe players. Access, as another example, is a concern of art museums as well as symphony orchestras.

Another way to understand why these four NEGs were selected for this study can be illustrated by the following hypothetical scenario. It is not uncommon to pick up a daily newspaper and read about an arts organization, for example a symphony orchestra, that has taken drastic measures to balance their books. The organization may have cut the number of performances and the number of musicians on staff. The organization no doubt has been in financial trouble for some time and no doubt will continue to have problems for some time to come as they try to improve their financial situation. At least four elements can be discussed here: 1) access suffers, the consumer does not have as many opportunities to attend; 2) artistic opportunity suffers, the artist may be unemployed; 3) the organization suffers, activities may be curtailed during the improvement phase; and 4) the element of time is present -- the financial troubles have and will be around awhile--and no doubt other areas that are concerned with time, such as cultural preservation, may suffer.

Therefore, the NEGs selected for this study are far-reaching in two ways: a) they are comprehensive, surpassing many minor goals and b) they are common to several disciplines. The NEGs selected for this
study are discussed further in the next section (constitutive definitions) and discussed even further in Chapter 2. But first, a brief review is presented below of how others have discussed and labeled NEGs.

The following examples illustrate the many NEGs and various labels that develop from common areas of concern. In conjunction with the authorization of the National Endowment for the Arts (NEA), the Rockefeller Panel (1965) addressed the question of how to support professional performance as the arts expand and grow. Their recommendations included: provide financial assistance, improve arts management and the individual organization, encourage the artist and advocate greater appreciation of the arts. Another example: "Objectives of arts policy should be to define a national identity, promote social criticism, further the widespread application of the arts, pursue excellence, encourage participation, and develop education" (Throsby and Withers, 1979, p. 293). Another example, the resulting attempt by the NEA to develop policy has stressed that: "Quality is to be preserved, new opportunities to be found for individual artists, and the arts are to be made accessible to all citizens everywhere" (Lowery, 1984, p. 16). Still another example, DiMaggio (1986) defined NEGs as encouraging excellence, the conservation of past works of art, making works of art accessible to all, allowing for innovative works of art, and developing the talents and desires of people to produce and consume art. One last example, the NEA's report "The Arts in America" discussed a common set of
concerns: artistry, financing, access/audience participation, and appreciation/arts education (Wyszomirski et al., 1990).

Constitutive definitions

The following is a discussion of the four NEGs and their labels that have been selected for observation in this study.

Artistic opportunity. As explained above, an arts administrator might be concerned with the production side of a process. One NEG that stems from this concern might be to provide artistic opportunities to an artist. Such opportunities might include employment or improved working conditions for an artist. The label "artistic opportunity" is designed to cut across the disciplines selected for this study and to reflect a very broad-based NEG. That is, art museums may provide artistic opportunity by exhibiting works of art created by local, less established, artists. The opportunity might not directly influence the creative process, but it might however enhance the process. That is, it provides the artist a chance to show the art work, to have it critiqued perhaps, or simply appreciated. It may provide the artist with inspiration to continue in that genre or to experiment with something new. At the same time, a ballet company may provide artistic opportunity by commissioning a local artist to create a new dance piece. Such an opportunity might have a more direct influence on the artistic process than the previous example.

For the purpose of this study, artistic opportunity is defined constitutively as any effort to provide or enhance the creative process. Examples of these efforts that an arts organization might
exhibit include: commissioning new works, employing additional artists, employing local artists, upgrading the level of artistic talent, expanding artistic staff, creating new artistic positions, and touring.

Access. Arts administrators might be concerned (on the consumption side of the process) with making the arts available for those who may chose not to attend because of real or perceived obstacles such as price, social standing, or proximity to the arts. In a similar vein as providing opportunity to those who produce art, this NEG is concerned with providing opportunity to those who might consume art. Efforts to make the arts more accessible in this context might include: attracting groups of people through non-traditional means (such as corporate-sponsored employee nights), discount prices for certain individuals or groups (such as students and senior citizens, or the economically disadvantaged), and reaching a broader-based audience through mass-media offers.

Examples of organizations which pursue the NEG "access" include the following. An opera company can hold open dress rehearsals which permit students or senior adults to attend for a nominal fee or often free. This practice allows persons who may not otherwise be able to afford regular admission prices the opportunity to become acquainted with this particular art form. Other examples are: senior citizen discount tickets to the symphony, free admission on Fridays to art museums, student "rush" tickets to the ballet.

Others, DiMaggio (1986) for example, have discussed access:
"In a democracy, most people agree that great works of culture should be accessible to everyone. It has been argued that efforts to acquaint the poor or ethnic minorities with high culture represent a patronizing form of cultural colonization; if such efforts are mishandled this may be the case. But if we see culture as equipment for living, as a kind of currency or capital, then acquaintance with a variety of cultural forms makes people better equipped and richer than they otherwise would be" (p. 69).

The American Assembly (1984) addressed access:

"The goal of universal access to and availability of the arts is an essential component of a public policy in the arts. We recommend that, whenever feasible, lower admission prices, more even distribution of arts facilities, and greater recognition of minority art forms all be encouraged" (p. 189).

Organizational development. An arts administrator may be concerned with the cultural organization. In one sense, it is an environment to bring together the art producer and the consumer. NEGs that develop from this concern area might range from the short term--for example, to make it to the end of the current fiscal year; or the longer term--to strengthen the individual cultural organization. This latter NEG might be appropriately labeled "organizational development". For the purpose of this study, organizational development is defined constitutively as any effort to enhance the efficient or effective operation of the organization. Examples of means to this end might include: reducing operating deficit, expanding administrative (non-artistic) staff, upgrading non-artistic staff benefits (such as providing medical or dental insurance), or increasing endowment earnings.
Cultural preservation. An arts administrator may be concerned with the continuity of our current cultural system. This does not negate the opportunity for improving the system. It simply is concerned with ensuring that something is available in the future that allows for the production and consumption of art and an environment for the two to come together. One NEG that develops from this concern focuses on efforts to acquaint the contemporary society, including artists, with models from the whole of arts history (DiMaggio, 1986). Included in this pursuit are any efforts that could be viewed as educational. Efforts might include: educational programs, workshops, seminars, lectures, arts-in-education, or artist-in-school programs.

The logic behind this NEG was discussed by The American Assembly (1984):

"Appreciation of the arts is by and large developed through the educational system. The beginnings of attitudes and opinions about the importance of the arts have the same locus. We cannot hope to establish the centrality of the arts to this society or their value to the individual without a clear recognition of this fact" (p. 188).

Endowment funds. For the purpose of this study, endowment funds will be considered in a broader context, as part of a process. At the center of the process is the endowment fund. Most definitions refer only to the fund. In the past, this reference perhaps was all that was necessary. If an individual contributed a substantial amount to an arts organization, often at the time of his or her death, an endowment fund would be established. Currently, endowment funds are often established by an organization and smaller contributions are sought to
provide the total. Numerous donations as small as ten or twenty dollars will be added together to provide an organization with one large fund. In larger nonprofit organizations, it is not uncommon to have such funds with sums of $100 or 200 million. Skilled development and maintenance resources are needed to effectively operate such funds. If successful, such funds can provide an organization with an additional income in the form of interest earned on the sums. While a large portion of the interest earned is spendable (for example, 60%), most organizations wisely re-invest a portion (for example, 30%) to offset inflation and use a portion (for example, 10%) to offset administrative expenses. In the case of an endowment fund worth $100 million earning 10% interest, this strategy would still provide a spendable income of $6 million. In addition, this strategy provides for income in subsequent funding periods. Therefore, endowment funds are defined as resources converted into accumulated goods devoted to the production of either future or present goods.

Objectives of the study

The specific objectives of this study are: a) to identify and describe the demographic and financial characteristics of arts organizations -- ballet, opera, and symphony organizations, and art museums -- selected in a national random sample; b) to determine the support for selected non-economic goals; c) to determine whether a relationship exists between the support of the selected NEGs and the demographic and financial characteristics; d) to determine whether a relationship exists between level of endowment funds and demographic
and financial characteristics; and e) to determine whether a relationship exists between support for the selected NEGs and level of endowment funds.

Using the static-group comparison design (Campbell & Stanley, 1963), the investigation is designed to be an ex post facto type of research. In this design, the level of endowment funds is the naturally occurring event or the level of independent variable the units have self-selected. Arts organizations with varying levels of endowment funds will be compared in terms of support of selected NEGs (the dependent variable) as measured by an instrument developed for this study and administered by a mailed questionnaire.

Instrumentation

Like other constructs devised for research purposes, the construct "support of selected NEGs" can be measured (indirectly). Constructs can be thought of as objects with properties (Emory, 1980). For example, a person (the object) has physical properties including height, weight, and posture; psychological properties including attitudes and intelligence; and social properties including leadership, ability, and status. Since properties such as motivation, attitude, and creativity "can not be measured directly, we must infer their presence or absence by observing some indicant or pointer measurement" (Emory, 1980, p. 118). For this study, an arts organization can be considered the object; the support of selected NEGs, one of its psychological properties; and indicants of support, that which will be measured.
To measure the indicants, scaling will be used; that is, procedures will be followed in order to assign numbers to indicants of the properties of objects. An example of scaling follows: "we may judge a person's supervisory capacity (object and property) by asking a peer group to rate that person on various questions (indicants) which we devise" (Emory, 1980, p. 258). For this study, an arts organization's support of selected NEG's (object and property) will be judged by asking the executive director of a sampling of arts organizations to rate various conditions (indicants) as to their importance to the overall objectives of the organization. For example, if conditions that are associated with the pursuit of access are important to an organization, then important also is the support of that NEG. We can infer the presence of support for an NEG when the conditions to make that NEG possible are rated important. For example, conditions that are associated with "access" might include providing discount admission prices to disadvantaged groups or offering discounts for admission through the mass media. The logic is that if none of these conditions are important to the objectives of the organization, then the goal to pursue access is not important, thus there is a low level of support for the NEG. Likewise, if every condition is important, then the goal to pursue access is important, and a high level of support for the NEG exists.

Consider another example, unrelated to an art organization. It can be argued that an individual also has both economic and non-economic goals. It may be important to an individual to be prepared for emergencies, a non-economic goal. The object and property in this
case are the individual and "emergency preparedness". Emergencies vary
from the traumatic to incidental; there are emergencies that may
require an individual to offer medical assistance like CPR or the
Heimlich maneuver and then there are lesser emergencies like missing a
ride to work and having to take the bus. If knowing first aid
procedures like CPR or the Heimlich maneuver is not important to an
individual, if taking extra cash for unexpected situations is not
important to an individual, then one can reason that this individual
does not place much importance on being prepared for emergencies. In
short, the individual does not support the NEG "emergency
preparedness."

The argument may come to mind, why not ask individuals if, for
example, they have money in their pocket at that particular moment;
would that not be a better indicant of being prepared for unexpected
emergencies? If persons for example had five dollars on them, would
that not be a good indication of being prepared to catch a bus in the
event of a missed ride? If persons had ten dollars on them, would that
not be even a better indication of being prepared to take a bus? One
argument against that line of questioning might be: money on a person
may be coincidental; a person might normally carry no money at all.
Or, the person may have brought five dollars to donate to an office
collection or to buy lunch. The money may not be directly linked to
"emergency preparedness."

Similarly, take the case of an art museum located in a multi-
level building which strives to ensure that differently-abled patrons
have access to the museum's collection. A condition to make this goal
possible may be a system of ramps. The system may be very important to
the organization even though at present time, a system is not in
operation nor is expected to be so in the near future because money to
pay for it is not available. However, proceeds from restaurant sales
are being earmarked for building improvement. The point is that it is
irrelevant if the conditions are actually occurring. That is, having
or not having a ramp in itself is not a good indicator of supporting
access in this example. The museum may not have ramps because it can
not afford them. It may want to build ramps as soon as it saves more
money. It may in the meanwhile have extra volunteers on duty to assist
differently-abled patrons up and down steps. So, even without the
ramps, efforts are taken to create favorable conditions that indicate
support of the NEG access.

By asking "how important is this condition," the instrument
developed for this study tries to give the respondent an opportunity to
consider the condition in the long-term. After all, the focus of this
investigation deals with goals. There is a difference between
supporting the goal and actually attaining the goal. In fact, goal
attainment may never be realized. To illustrate this point, universal
access in the arts may be a long-time coming. There are, however,
ongoing conditions that indicate whether the attainment of that goal is
nearer or further away. It is like measuring the temperature, a number
scale is assigned to the various levels of heat and cold; it is called
a thermometer. The glass tube arrangement with mercury provides us
with an indicant of the temperature by the rise and fall of the mercury
column in the tube as temperature changes (Emory, 1980).
Variables for this study were measured by a two-part mail questionnaire. The first section of the questionnaire measured the construct "support of selected NEG's," while the second section measured the level of endowment funds and related financial and demographic characteristics. The first section contained four parts; each part addressed one of the four selected NEG's. Each part measured the importance of the variable to the objectives of the organization as perceived by the executive director of the organization. The responses for each of the four variables as to their importance to the organization was summed to determine support level, which then was categorized as high, medium, or low. The second section, to determine level of endowment funds and related financial and demographic characteristics, was contained in one part.

The support of four selected NEG's, considered as dependent variables, are operationally defined as follows.

Access: the summed score of a 7-point Likert-type scale, containing twelve statements reflecting activities commonly performed to make the arts available for those who may chose not to attend because of real or perceived obstacles such as price, social standing, or proximity to the arts, answered by rating each statement as to its importance to the objectives of the organization, and administered by a mail questionnaire.

Artistic opportunity: the summed score of a 7-point Likert-type scale, containing twelve statements reflecting activities commonly performed to provide or enhance the creative process, answered by
rating each statement as to its importance to the objectives of the organization, and administered by a mail questionnaire.

Organizational development: the summated score of a 7-point Likert-type scale, containing twelve statements, reflecting activities commonly performed to obtain efficient or effective operation of the organization, answered by rating each statement as to its importance to the objectives of the organization, and administered by a mail questionnaire.

Cultural preservation: the summated score of a 7-point Likert-type scale, containing twelve statements reflecting activities commonly used to acquaint the contemporary society to models of the whole of arts history, including educational activities, answered by rating each statement as to its importance to the objectives of the organization, and administered by a mail questionnaire.

Hypotheses

The following is a discussion of the hypotheses developed for this study. According to Emory (1980), relational hypotheses describe a relationship between two variables (characteristics, traits, or attributes) with respect to some case (entity or thing). The relationship between variables can be either correlational (the variables occur in some predictable relationship) or explanatory (one variable is somehow responsible for the other). "Correlational relationships state merely that the variables occur together in some specified manner without an implication that one causes the other. Such claims are often made when we believe that there are more basic
causal forces that affect both variables, or when we have not developed
enough evidence to claim a stronger linkage" (p. 32). An example of
this hypothesis: people in Columbus give chocolate ice cream a more
favorable rating than do people in Cincinnati. For comparison, an
example of an explanatory hypothesis is: an increase in family size
leads to an increase in the amount of ice cream purchased. There is
the "implication that the existence of, or a change in, one variable
causes or leads to an effect on the other variable" (p. 32). For this
study the relationships are stated as correlational hypotheses; not
enough evidence is available to make claims of a stronger linkage nor
can we assume that there are not more basic causal forces that affect
both variables.

Vogel (1986) argued that artistic freedom, which fuels artistic
creativity, comes from financial independence. In other words,
artistic opportunity is dependent upon financial independence; no
single source should dominate, influence, or control an organization.
A variety of sources is necessary to support the arts and provide an
impartial framework. Endowment funds add to the variety of sources
further ensuring a freedom from financial dependency, and in turn
allowing artistic opportunity to flourish. Thus, in the presence of
endowment fund interest there would seem to be a concern for the
artistic opportunity.

Hypothesis 1: There is a relationship between level of
endowment funds and the support level of artistic
opportunity.
Economic estimates of what ticket prices would be without subsidy are phenomenal.

"If there existed a total reduction in all contributions, for the average organization, prices would increase by 70% for theatre, more than 100% for opera, symphony, and dance. The corresponding effect would be a 7.6% annual decline in theatre attendance, 13.7% for opera, 18.2% symphony, and 13.2% for ballet" (Touchstone, 1980, p. 33).

Without intervention, prices would skyrocket which could severely endanger accessible performances. With intervention, such as with endowment fund interest, prices could remain low and access to performance or exhibitions high. Thus, in the presence of endowment funds there would seem to be a concern for the pursuit of access.

Hypothesis 2: There is a relationship between level of endowment funding level and the support level of access.

Economists argue that a lump sum increase in contributions relaxes budget constraints. The desirable results include increased labor, increased capital, and increased output. Conversely, a lump sum decrease tightens constraints and prompts inputs and outputs to fall (Gapinski, 1985). Endowment funds often involve lump sum increases, which might relax budget constraints, and produce unwanted results if not monitored. It is reasonable to argue that with endowment funds comes a need to develop the organizational structure to support the process. Thus, in the presence of endowment funds there would seem to be a concern for the development of the organization.
Hypothesis 3: There is a relationship between level of endowment funds and the support of organizational development.

Economists argue that to repair the financial difficulties in the arts either a short- or long-term remedy can be used. In the short-term, support is moved away from the cultural organization -- the producers of art -- toward subsidizing the individual -- the consumers of art. One example of a short-term remedy is to provide the individual with ticket vouchers. Short-term remedies provide shorter lasting benefits. In the long-term, altering the preference functions of future generations is required (Cwi, 1980). To take advantage of the longer lasting benefits of an economic remedy, arts administrators must then logically take the longer term view, which focuses on future generations. Numerous ways exist to focus on future generations: one can focus on advocating a greater appreciation of the arts; one can focus on arts education; one can focus on preserving current culture for future generations; or one can focus on endowment funds, which provide for future products or goods for future consumption. Preservation, arts education, and endowment funding are all important to a long-term remedy. Thus, in the presence of endowment funds there would seem to be a concern for cultural preservation.

Hypothesis 4: There is a relationship between level of endowment funds and the support level of cultural preservation.

Kerlinger (1973) suggests formulating control hypotheses to describe the anticipated relationships between the extraneous variables
and the dependent variable(s), in this case, the support of selected NEGs. Five extraneous variables have been identified for this investigation: discipline, budget size, age of organization, age of endowment fund, and geographical location. Crimmins & Keil (1983) established the hierarchal effect in regard to endowment funds, that is, "older, more established nonprofits are more likely to have endowments" (p. 134). Thus, the extraneous variables "geographical location," "budget size," and "age of organization" are likely to take this effect into consideration. Further, "with the exception of symphony orchestras, all performing arts organizations fell at the newer and less-endowed end" (p. 134). When ranked by "percentage with endowments" the disciplines fell from high to low in this order: orchestras, museums, ballet, and opera. The extraneous variables "discipline" and "age of endowment fund" would likely take into consideration the noted differences between the organization types.

The control hypotheses are as follows:

Hypotheses 5 - 8: There is a relationship between the support level of selected NEGs and discipline.

Hypothesis 9: There is a relationship between the level of endowment funds and discipline.

Hypotheses 10 - 13: There is a relationship between the support level of selected NEGs and budget size.

Hypothesis 14: There is a relationship between the level of endowment funds and budget size.

Hypotheses 15 - 18: There is a relationship between the support level of selected NEGs and the age of the organization.

Hypothesis 19: There is a relationship between the level of endowment funds and age of the organization.
Hypotheses 20 - 23: There is a relationship between the support level of selected NEGs and the age of the endowment fund.

Hypothesis 24: There is a relationship between the level of endowment funds and age of the endowment fund.

Hypotheses 25 - 28: There is a relationship between the support level of selected NEGs and the population size of the geographical location.

Hypothesis 29: There is a relationship between the level of endowment funds and the population size.

Chapter II examines in more depth the problem of arts policy development and its relationship to funding sources. The selected NEGs for this study are also discussed. The procedures utilized in this investigation are detailed in Chapter III. Results of the investigation are presented in Chapter IV and discussed in Chapter V. Conclusions are drawn from this discussion and recommendations for future studies are offered in Chapter V as well.
CHAPTER II

REVIEW OF LITERATURE

The following is a discussion of the literature that supports the hypothesized relationship between non-economic goals of arts organizations and endowment funds, one type of earned income source that may influence the arts policy process. The following issues will be examined: a) the uniqueness of arts policy, (An attempt will be made to distinguish arts policy from the more common types of policy and public policy.); b) arts policy as a process -- the "what" involved in the process; c) the influence of funding sources on arts policy -- the "who" involved in the process; and lastly d) how research can add to the understanding of the relationship between the what and who, specifically, the selected NEG-s of arts policy and endowment funds.

To begin, an argument can be made that there exists in this country a phenomenon known as "arts policy." Its development is probably as unique as the development of the arts themselves have been in this country. Arts policy is different from the more common types of administrative policy, although some similarities do exist. Arts policy is also different from public policy, but again, similarities do exist. An understanding of the differences between administrative, public, and arts policy will facilitate the understanding of the theory
discussed later in this chapter. These distinctions, however, are not often emphasized in the literature.

Pankratz (1987) offers the following definition of policy:

"Policies entail choice—they are things that we choose based on intents and purposes. The term "policy," therefore, is limited to what can be chosen and is within our capacity to control. Further, the idea of policy entails a choice among alternatives, i.e. policy arises only when there is some conflict of goods. Choice is necessitated most often by scarcity of resources such as time, materials, finances, and personnel, and a need to achieve the optional composition of conflicting goods" (p. 13).

This definition can be broken down into four parts: a) policy entails choice; b) policy is limited to what can be chosen; c) policy entails a choice among alternatives; and d) choice is necessitated by scarce resources. "Choice" is obviously the key word in this definition followed closely in importance by "scarce resources." The following question can be asked: Are these terms appropriate for a discussion of arts policy? More important questions can be asked regarding the phrase "Policies entail choice..." How should the word "entail" be interpreted? Does it mean "include" or "necessitate?"

What would happen if -- for the sake of making a point -- the sentence were to be rewritten? If the word "include" were to be used to replace the word "entail," the sentence would read:

"Policies include choice..."

To elaborate further, perhaps synonyms could be used to replace "include." The sentence would then read:
"Policies consist of choice..., Policies contain choice..., Policies involve choice..."

Now, if the sentence were to be phrased with the word "necessitate" replacing "entail," the meaning would change dramatically:

"Policies necessitate choice..."

Synonyms for "necessitate" provide an even stronger illustration:

"Policies demand choice..., policies require choice..., policies compel choice..., or even, policies cause choice."

It may seem as if Pankratz's definition is being picked apart, needlessly perhaps, over a question of semantics. The intent, however, is to illustrate the larger question concerning how policy is portrayed in the literature. Among the concerns are: a) policy is often referred to apart from the process that it is a part of, and b) policy definitions often vary as to "cause and effect." Continuing to use Pankratz's definition, these concerns can be explained.

If "entail" is being used to mean "include," then it would seem there are other things that need to go along with choice -- "Policies include choice among other things such as..." Are there not other components that form the policy process? Are they any less important than choice? One is left wondering how powerful choice is in the process and who gets to make the choice.
Pankratz's definition of policy raises the question of cause and effect. "Policies entail choice" can translate as policies cause choice, an effect. Other definitions, presented shortly, imply just the opposite. There seems to be a lack of cohesiveness in the portrayals of policy as to: which comes first, policy or choice? This question may be as troublesome as "Which came first, the chicken or the egg?" but it is an important question to think about. A time sequence needs to be established. Are our choices a result of policy? Or is policy a result of our choices? (If in fact we have a choice at all!)

Other unanswered questions about arts policy are apparent in the literature. As examples: Does an arts policy exist? If not, are there other policies in general that could constitute an arts policy? If so, should it be called arts policy, public policy, cultural policy, or national policy? These questions have been debated throughout the literature for much of the past decade. Communicating a more accurate interpretation of policy would serve at least two purposes: a) to educate others who are influenced by the policy process as to what precisely the process involves and what they can do, in turn, to influence policy; and b) to convey that research in arts administration can be disciplined and can also be used, in turn, to improve the process.

Using Pankratz's definition as a spring board, other policy definitions can be explored. Webster offers a superficial definition of policy: "Course; principles determining action. Practical procedure; wise management." This definition is presented here only to
illustrate the cause and effect implication -- principles cause action, similar to Pankratz's definition. The definition does not mention scarce resources nor choices.

Kerr (1978) writes a lengthy but eloquent definition of policy:

"Policies are doings...if someone had not made the policy, the policy could not exist. ...whether made with careful deliberation or with little forethought, a policy imposes order. ...an essential virtue of policy is that it makes possible the systematic, collective pursuit of goals. If we were to limit our dreams or goals to those that could be achieved by whimsical choices and disjointed, sporadic efforts, then we would have no need for policies. If a choice regards common purposes and if deliberate, sustained, systematic action is required to serve those purposes, a policy is clearly appropriate. Policy thus provides an escape from social chaos, but not the only escape. Habits, customs, and mores acquired and perpetuated by social osmosis, and so never deliberately chosen, also, to some extent, order our actions. Only when we choose to pursue rationally our visions of better worlds do we require policies. Actions shape our world, therefore we might as well design policies that can shape our actions into a systematic pursuit of our best dreams" (pp. 6-8).

There are at least four parts to this definition: a) policy is manmade; b) it imposes order (which is quite different from saying policy entails choice, as different perhaps as communism and democracy); c) it makes possible the pursuit of goals, goals that are above and beyond whimsical choices, goals that are shared and require action to be attained; d) policies come into play after we choose to pursue rationally a better world than that provided by our current state of affairs.

This definition also implies a sequence of cause and effect. According to Kerr, choice precedes policy. The complete sequence is:
social chaos; choice to pursue visions of better worlds which can only be attained by intentional, organized, continued action; and the result, manmade policies which can order that action. In short, this definition comes close to the essence of the policy process, but falls short of capturing the uniqueness of arts policy. To define arts policy, it may be necessary to first distinguish it from the more commonly encountered types of administrative policy.

Hodgetts (1980) in his text on administrative policy offers a commonly accepted definition of policy: "a guide for carrying out action" (p.6). He sites a definition of policy used by General Motors, basically a wordy re-statement of "a guide to carrying out action."

"A policy is definition of a common purpose for organization components or the company as a whole in matters where, in the interest of achieving both component and overall company objectives, it is desirable that those responsible for implementation exercise discretion and good judgment in appraising and deciding among alternate courses of action. (p. 7)

One point to emphasize about this definition is the phrase: policy is definition of a common purpose. In its entirety, the definition can be summarized to say: Policy should guide those who are responsible for actions taken to meet company objectives — a guide for carrying out action, in other words. This definition ignores the whole of the process; it mentions only those responsible for implementation. At best, administrative policy takes a top-down approach while, it could be argued that, arts policy takes a bottom-up approach. Organizations rely on a policy structure, often ranging from major policies to
functional policies, from minor policies to procedures and rules. It is the broad general policy guidelines that guide the organization through problem situations. While this seems an appropriate structure for an organization, is such a hierarchy appropriate for a structure or unit other than an organization?

Degge (1987) defines arts policies as: "guidelines necessary to benefit and advance the arts or to improve some aspects of public or cultural life" (p. 13). This definition is similar to "a guide to carrying out action." Degge does, however, make some noteworthy points about arts policy, useful for distinguishing it from general policy.

"Policies in art are numerous and most certainly do vary. Some are implicit...others are more explicit. Some policies are based in purposes which appear altruistic; the intrinsic, cultural value in the arts for individuals and society are expressed as foremost. More express extrinsic advantages for promoting the arts. In all instances, art policies mark diverse values held about art and reflect a perceived importance of the arts to various aspects of society" (p. 13).

Among the interesting points that have to be considered from this definition are: a) there are varying types of arts policy, some implicit, some explicit, some express the intrinsic values of the arts, some express the extrinsic values; and b) all arts policy underscore values and the importance of the arts to society. With these points clearly expressed, a distinction can be made between arts policy and, at least, commonly known types of "business" policy: Understanding values is one of the crucial keys to understanding arts policy. To further define arts policy, it may be necessary to next distinguish it from public policy.
Hodgetts (1980) offers a possible explanation for why public policy is often used so freely to explain other types of policy. Public policy is a branch of "administrative policy science," which covers many fields of administration. Those included are:

* urban administration (transportation, fire, police, public housing)
* environmental administration (Conservation, water, air and energy resources)
* third-sector administration (research institutes, nonprofit consultants);
* business administration (retail, food service, manufacturing);
* public administration (federal, state, county)
* institutional administration (education, churches, libraries, the arts).

Only one of these fields -- public administration -- has begun to systematically study policy, better known as policy sciences. "Unfortunately, the term policy sciences has been interpreted narrowly to include only the public sector rather than expanding it to include all the administrative science segments of many different fields" (p. 15). The point is: public policy science is germane to public administration. An arts policy science would be more suited to arts administration. Until an arts policy science develops, public policy principles can be extended across the thin lines that separate the fields since both public policy and arts policy are branches of administrative policy science.

When the broader "administrative policy science" is defined, the essential aspect of the process is not overlooked. Defined, administrative policy science is: the systematic study of administrative processes in modern organizations, including the study of the analysis, formulation, implementation, interpretation, and
evaluation of policies -- policy process -- and operations by organization executives. These five aspects of the policy process allow for analysis of the long-term goals, challenges, and opportunities of the organization, formulation of goal structures to meet the challenges, implementation of plans to meet the goals, interpretation of the goals, and evaluation of the success or failure of those goals (p. 13). Thus, in a broad sense, a study of policy should look systematically at these administrative processes, all of which involve goals. Briefly summarizing the discussion to this point, two key components to understanding arts policy are a) values or goals and b) a process to involve these goals.

A closer look at what is involved in the process.

Perhaps the most important piece of information one can gain from the Hodgetts text is the following bit of history. In 1960, President Eisenhower established the commission on National Goals and requested the commission be administered by the American Assembly at Columbia University. The commission established a set of domestic and international goals. On the domestic scene, the commission stressed, among other things, equal opportunity and education. Important to this discussion are the other things, in particular: the commission stressed the continuing developments of the arts. New programs and governmental agencies were established under the Kennedy administration "to attack many of the problems suggested in the commission's report" (p. 24). It can be argued the National Endowment for the Arts (NEA) was one of these initiatives. As of 1980, although having presidential
endorsement throughout the years, many of the goals proposed in 1960 were not being attained, according to Hodgetts.

According to Lowry (1984), the NEA was charged by Congress to develop and promote a broadly conceived national policy of support for the arts. Although heavily criticized, the resulting attempt to develop policy has stressed that: "Quality is to be preserved, new opportunities to be found for individual artists, and the arts are to be made accessible to all citizens everywhere" (p. 16). When demands are made to develop arts policy, do they express the desire for the NEA to develop a more specific national policy of support for the arts? Or, do they express the desire for government, in a more encompassing manner, to take an active role in the policy process, that is, the analysis of goals, formulation of goal structures, etc.?

Frohock (1979) begins a discussion of politics and policies with a simple definition of politics: "authoritative allocation of values" (p. 3). While perhaps a lengthier definition is needed to define a topic as broad as politics, it does capture the essence of the "what" involved in the process, which is "values." Policy can allocate values in two prominent ways: a) by rearranging the attitudes of citizens that express values, or b) by distributing the things that are valued by citizens. The term allocating values also refers to disputes over what ought to be valued. These are efforts or "actions aimed at clarifying, at settling on primary standards and rules, and at reaching basic conclusions about the good life" (p. 8).

All political systems authoritatively allocate values; it is the essential function, whatever the arrangement. Frohock suggests that if
one were to find this function of politics, the authoritative allocation of values, politics could be studied in whatever institution was performing this function. The institution could be the office of the president or the General Motors Corporation. What is important is the system of actions with the purpose of allocating values authoritatively at the center.

A system design for politics might resemble the following:

-> demands/supports -> AUTHORITATIVE -> policies/decisions ->
   (inputs)  ALLOCATION OF (outputs) VALUES

This approach to politics requires looking not at a static unit, but rather at the flow of a certain type of action that can occur in many social structures. Demands and supports become policies and decisions through actions that authoritatively allocate values.

Returning a moment to Lowry:

"Even at the end of the historical spectrum when the private patron was all, art was also justified as an indispensable element in a democracy, serving both to elevate public taste and to celebrate freedom in the new Republic. In their own building of a private collection, some patrons had a second motive, the presentation or bequest of art for education and enlightenment of the citizenry, and this was policy, [emphasis mine] whether objective or patronizing. In short, it did not wait for governmental agencies to discover a cultural policy using art as a means to education or enlightenment. The motive was buried deep in the origins of American society" (p. 5).

Applying elements of this account to Frohock's model, private patrons of the arts had created and were supporting art in society (the institution). Values were authoritatively allocated. (Wealth in this
instance was perhaps the qualifier of authority.) Values, such as elevating public taste and celebrating freedom, were originally allocated. Other values, such as education and enlightenment were subsequently allocated.

I am compelled to point out here that we are talking about values, not about scarce resources, not about social chaos, not about guidelines to advance the arts. I would argue that as the history of supporting the arts progressed, private patronage of arts was joined by a) a more plural citizenry through tax breaks -- indirect government support (beginning in 1917 to be exact); b) foundational support (increasing in the early 1920's); c) corporate support (c. 1935); d) along with more indirect government support, e) direct government support (1965, the authorization of the NEA), and finally f) earned income (developing throughout the 1970's and 80's). As the social structure became wider with more supporters, society looked to each of the new supporters to continue the allocation of values. There have been other values delineated since private patronage sought to allocate education and enlightenment -- artistic creativity, preservation, and organizational development, to name a few.

According to Frohock, defining policy in a single phrase is just as difficult as trying to condense the political process into a single phrase. In its most general sense though, policy is the pattern of action that resolves conflicting claims or provides incentives for cooperation. It must be stressed that policy is "a social practice, not a singular or isolated event" (p. 11). A political event can take place but it is "not a policy, nor an issue for policy resolution,
unless it is adopted as a recurring activity, a practice by some social unit. Policy is occasioned by the need either to reconcile conflicting claims or to establish incentives for collective action among those who do share goals but find it irrational to cooperate with one another. A non-utopian atmosphere of things-gone-wrong exists: people are making demands, or expressing goals, in ways that can not be settled either spontaneously or through some happy operation of natural law" (p. 11).

Frohock recognizes that the conflict is not limited to claims; the conflict can extend to courses of action. (Still, no mention is made of scarce resources.) Even though a particular course is endorsed, action can be taken in the contrary as a result of leadership perception of what is required for order. Also, goals can be shared but a successful way of cooperating to obtain these goals may be lacking.

Still at question though, is the type of policy being sought. If policy is a patterned attempt to resolve or manage conflicts or to provide rational incentives to secure agreed-upon goals, then what form will the patterned attempts take? Frohock suggests policy can be categorized in the practical sense and offers the following categories and examples of each:

* Regulation -- the FDA, the FOC
* Distribution -- Medicare, Social security,
* Redistributive -- progressive tax policies
* Ethical -- aimed at establishing the correct practice for some moral issue, for example, policy on abortion would be regulatory in nature but it would regulate a moral issue.
* Capitalization -- aimed at increasing the productive capacity of society's institutions. Examples include federal subsidies through cash payments or tax subsidies.
Thus, a more complete picture of the process may resemble the following model:

\[ \text{INPUTS} \rightarrow \text{POLICY} \rightarrow \text{OUTPUTS} \rightarrow \]

- identification
- organization
- demand
- support
- apathy
- regulation
- distribution
- redistribution
- ethical ruling
- capitalization
- application
- enforcement
- interpretation
- evaluation
- modification

Using these categories to describe arts policy, it can be argued that the last type - capitalization - has been the patterned attempts our government has exhibited over the past three decades. It can be argued further that the policy, the pattern of action, has been to provide subsidy aimed at increasing productivity. Thus, there is a problem with using these categories: there is no category for discussing values. The categories almost force one to discuss policy in economic terms, which this discussion has tried to discourage until later. Where in this list of categories could the following activity be placed: The creation of a more centralized place for the arts?

Frohock also suggests the categories could be based on logical considerations, that is, policy can be divided by the "who" and the "what." This system may be more suitable for discussing arts policy. The "what-to-be-accomplished" policies would fall under substantive policy. This type includes both rule and goal policies. Examples of each are:

Rule: An education act outlines the types of financial aid to be given to schools and pupils

Goal: Sets goals to be achieved by any of a number of actions
There are also the procedural "who" policies, who is to carry out some action. For example, revenue sharing is intended to shift many urban policies from the federal to state and local level.

Perhaps as DiMaggio (1984) suggests, what distorts our discourse about public policy toward the arts is the rhetoric of means and numbers.

"Advocates of the arts pose their justifications for public, and increasingly, corporate involvement in terms of such fiscal rationales as economic impact, urban development, or encouragement of tourism. We are asked to support the arts because they are means to other, more measurable ends--because they draw consumers who spend money on shelter and meals, attract businesses that employ local workers, and increase the value of real estate in the inner city" (p. 97).

DiMaggio suggests in a way to get back to basics in policy discourse: talk about the true ends. "Policy toward the arts should insulate and protect those goals -- and the organizations that implement them--that the marketplace will not support" (p. 99). Perhaps it is a question of priorities, as put forth to the American Assembly for debate -- the intrinsic values in the arts rather than social, political, or economic ends.

It is difficult to separate the two, however. "We have to encourage an environment in which the arts are nourished. And that takes money and it takes local policies and federal policies that make it possible" (American Assembly, p. 107). This then, is perhaps the most important key to understanding arts policy, while we are talking non-economic goals, the goals can not be discussed outside the realm of economic support.
It can be argued then that a more accurate picture of the arts policy process might resemble the following.

\[
\begin{array}{|c|c|c|c|}
\hline
\text{INPUTS} & \text{SYSTEM TO IDENTIFICATION} & \text{POLICY} & \text{OUTPUTS} \\
\hline
\text{organization} & \text{allocate} & \text{definition} & \text{application} \\
\text{demand} & \text{values} & \text{enforcement} & \text{interpretation} \\
\text{support} & \text{authoritatively} & \text{evaluation} & \text{modification} \\
\text{apathy} & \text{} & \text{} & \text{} \\
\hline
\end{array}
\]

The who involved in the arts policy process.

In 1984, The American Assembly convened to discuss public policy and the arts. W. McNeil Lowry chaired the discussions and edited the proceeding papers. As was emphasized during the proceedings, the arts in the United States are funded by a diverse source of patronage, in which is found the "best protection from the possibility of outside interference or control" (American Assembly, 1984, p. 187). Among the funding sources are: private patronage, government support, foundation and corporate support, and earned income. He offered the theory that "public policy in the arts is the sum of private and governmental interests with particular or general values in mind" (p. 21). A distinction is made about the use of the term "public" when speaking of policy in the arts:

"To call a policy "public" does not negate the influence of individuals on it, whether artists or patrons or philanthropists ... Public policy may simply be policy that has impact in public, and whether in education, in the arts, in health, ...we may be more strictly speaking about a set of influences" (p. 2).
DiMaggio (1986) presents the most important interpretation of arts policy related to this discussion. In the broader sense of policy, he writes on "how decision makers in a pluralistic society can best allocate responsibility for the support of its culture" (p. 68). (Is this not authoritatively allocating values?) He alludes to the three distinctions outlined above: values, process, and economic support. He refers to the values that arts policy should maximize, such as excellence, conservation, access, innovation, and participation, among others.

Two principles of arts policy are defined and discussed by DiMaggio: a) that a significant amount of funding variety is necessary and b) each funding source has its own agenda and its own limit as to what it will support. He stresses that while the first principle is commonly accepted, it is contrary to the customary ways of viewing policy. That is, goals are usually established first, then airtight systems are designed to achieve them. Conversely, in the arts, a diverse and changing system is used to achieve the goals. This is what makes cultural policy different from social, military, or fiscal policy.

There also is no one single plan to arts funding. There is a variety of influences -- each with its own agenda -- deciding what aspects of the arts should be funded. Plans to support the arts can either ignore this second principle, or recognize it -- along with the limits brought on by each agenda -- and build it into the plans.

DiMaggio identifies four models of how the variety of influences might interact with one another in the support of values.
"The first model is that government lead and others follow. The second is that corporations and private foundations lead, calling upon government when they need its financial clout. The third proposes a partnership among government, business, and foundations to set policy collectively. A fourth approach is to discern a natural division of labor among funding sectors and to build policy upon that" (p. 71).

The fourth model proposes distinguishing a natural division of labor, that is, classifying what values, or non-economic goals of arts policy, each funding sector might support and to what limit. Benefits of this approach include: a) the model recognizes the importance of multiple funding sources and b) it includes a system designed around the constraints of each of the funding sources. According to DiMaggio, the model is not without flaw: there may be some values that none of the funding sectors address. "One role of government in such a system should be to identify the values (and organizations that embody them) that are being served poorly; to encourage funders who can to support those values; and, when possible, to itself act as patron of the last resort, in addition to its normal patronage functions" (p. 73).

A graphic representation incorporating DiMaggio's theory among the others might resemble the following model.

```
-> INPUTS -> SYSTEM -> POLICY -> OUTPUTS ->
identification
organization
demand
support
apathy

1. 2. 3. 4.
definition of actions
application
enforcement
interpretation
evaluation
modification
```

(Where the system represents the four funding sources.)
DiMaggio discusses the values that funding sources are likely to foster. These relationships are summarized in the Table 1.

DiMaggio's choice among policy alternatives is similar in reasoning to a theory developed by Saaty and Vargas (1982). In their book, "The Logic of Priorities," the reader is provided with examples of how to deal with unstructured problems; particularly ones involving socio-economic and political issues with qualitative and intangible factors. The authors propose the Analytic Hierarchy Process (AHP). "The object is to fulfill as well as possible the purposes of the people concerned rather than to legislate an outcome based on principles set forth by outsiders to the problem. Thus, perceived constraints must be examined and not taken for granted --this is the only hope we have to plan our way out of difficult problems" (p. 15).

The theory combines two well-known approaches: causal processes and purposive action processes. In the former an action is described as an event with particular outcomes. The sequence is:

\[ \text{cause} \rightarrow \text{event (outcome)}. \]

The cause may be events either internal to the system or external.

In purposive action processes the sequence is:

\[ \text{action} \rightarrow \text{event (outcome)} \rightarrow \text{consequences} \]

\[ \text{(for the actors involved)}. \]

"In this type of process, the actions are no longer identical with the events. Actions of the actor in the system control the outcome of events, and they are selected through the conscious choice of the actor.
who chooses alternatives he believes to be more beneficial to him. Thus, the outcome of an event does not directly depend on the outcome of previous events, through a causal process, nor on attributes of the individual. The actor makes his choice of actions through his perception of the consequences that the outcomes will have for him" (p. 16). Perhaps this is what Pankratz refers to when he speaks of action, choices we can control, and allocating scarce resources.

But the AHP and the theory proposed by DiMaggio take this approach one step further. "The AHP synthesizes these two approaches by identifying the outcomes that are more beneficial to the actors and at the same time provides a way of assessing the factors (causes) that may have more to do with certain types of outcomes" (p. 16).

"Whether we wish to change the structure or the function of a system, we must set goals and identify different types of futures that would help to attain these goals through the implementation of specific policies. Here the purposive and causal approaches can be clearly identified. On the one hand, we establish the purpose of the system; and on the other, we identify the possible forces (causes) that shape the future" (p. 16).

This reflects the key to understanding arts policy mentioned above. There must be a synthesis of the what and who; not simply distinguishing the values from the supports, but synthesizing the two together. Likewise, this is reflected in the natural division of labor theory: the purpose of the system is established -- the support of values; and the possible forces that shape the attainment of those values are identified.
If one can accept the theory of a natural division of labor, the next question might be how does earned income fit into the picture? With an increased reliance on earned income, will the division of labor change?

How values are related to the economic theory of arts funding.

The following is a brief summary of the economic theory of arts funding. The intent is not to debate the accuracy of the theory or its logic, but to present evidence that a relationship between non-economic goals and arts policy is acknowledged in the literature that addresses economic theory. There are at least five intricate processes involved in this theory. They are the financial difficulties of the arts, corrective intervention, growth, management, and policy.

The theory might best be illustrated by picturing a balanced opportunity in an arts organization to attain both economic and non-economic goals, both simultaneously and to their fullest. This condition does not exist, at least not currently, because of the financial difficulties in the arts. Reasons for the financial difficulties may be the non-profit nature of the arts organizations or its inherent funding structure. One primary reason often cited for these financial difficulties is the limited capacity to increase productivity -- constraints on the number of seats in a performing arts hall for example. (This relates to the argument that the government's subsidizing of the arts has been an attempt to stimulate productivity.) Whatever their cause, financial difficulties result in an increased support of economic goals and a decreased support of non-economic
goals. In other words, the task of providing publicly accessible performances and exhibitions is made more difficult by the increase in costs. The American Arts Alliance (1988) provides some examples of these recent rising costs:

* In the last four years, dance companies recorded an average increase on 10 percent in operating costs

* Between 1985 and 1986, art museums suffered steep rises in a number of crucial areas, including a 44 percent increase in curatorial and exhibition expenses and a startling 52 percent increase in acquisition costs.

* Theater operating expenses during the 1986-87 season alone increased 5.6 percent over the previous season.

* The opera field reported a 7.2 percent increase in operating costs between the 1984-85 and 1985-86 seasons.

* From 1982 to 1986, there was a 49.6 percent increase in symphony orchestra expenses. (p. 10).

In an attempt to seek a remedy for the chronic financial difficulties in the arts, an arts organization can increase unearned income. By doing so, the income will allow a stabilization between the economic and non-economic opportunities. In other words, the financial difficulties would ease, allowing for less support of economic goals and more support of non-economic goals. This unearned income can be viewed as corrective intervention. "Corrective intervention comes through private donations and public transfer payments" (Wahl-Zieger, 1980, p. 224). Both types of intervention are needed increasingly to pursue non-economic goals such as publicness and creativity. A similarity exists between these types of intervention. Contributions act like subsidies; that is, prices are low because of contributions (Touchstone, 1980).
With intervention, however, there is a risk of going over board. Too much attention to the non-economic goals results in economic goals being ignored. Much of the theory about the precarious balance between economic and non-economic goals has developed since Saumol and Bowen (1964) researched what has become known as the earnings gap. (This is not to say that the earnings gap did not exist before the 1960's. Their seminal study of the economic theory of arts funding traces the earnings gap as far back as valid financial records go, back to the 1930's.) The term "earnings gap" originally was used to indicate a condition where expenses exceed income. It has since been theorized that an increase in the earnings gap need not be interpreted necessarily as a sign of poor or unfavorable conditions. Natural growth -- a slight increase in productivity -- produces a gap. Increased output -- an increase in the number of performances and quality -- will increase the gap. Only if there are contributions to fund this output growth, can the gap grow (Schwarz, 1982). Thus, it may be quite natural to experience an earnings gap, in fact, quite good since an earnings gap indicates a natural growth. However, contributions, as corrective intervention, are usually thought of as a way to reduce the earnings gap. They may actually add to the problem: By funding non-economic goals, economic goals are ignored, resulting in more financial trouble.

The need exists to manage this intervention in order to ensure positive natural growth while keeping a watch over excessive output growth. Schwarz (1983) emphasized this need for financial management in the arts. Leighton (1985) also argued for a closer financial watch
over the arts by expressing the need for "adequate, ongoing statistical
studies of arts funding...(p.48)."

Briefly summarizing, an arts organization acquires additional
income to keep financial difficulties in check. Collectively or
privately, by public transfers or by contributions, corrective
intervention is made. Contributions, while similar to subsidies in
that they keep ticket prices low, can also fund output growth. Output
growth can increase an already existing earnings gap, which is often
produced by natural growth. Financial management is necessary; at the
very least to try to provide a proper mix of corrective intervention
and to regulate growth.

Leighton took this idea one step further by adding that "sound
policy can be built" (p.48) on the studies of arts funding. According
to Leighton, "The goal of arts policy at all levels should be to create
a vigorous, free, and independent artistic community (p.50)." Other
economists have discussed arts policy. "Objectives of arts policy
should be to define a national identity, promote social criticism,
further the widespread application of the arts, pursue excellence,
encourage participation, and develop education" (Throsby and Withers,
1979, p. 293).

The Rockefeller panel, in conjunction with the authorization of
the NEA in 1965, addressed the question of how to support professional
performance as the arts expand and grow. Their recommendations
included: provide financial assistance, improve arts management and
the individual organization, encourage the artist, and advocate greater
appreciation of the arts.
It is not unreasonable to argue that an arts organization can also seek to increase earned income in addition to unearned income to address its financial difficulties. Nor does it seem unreasonable to argue that too much earned income would produce the same result as does too much unearned income if they are both viewed as interventions. The same result would be: the risk of an increased focus on non-economic goals, an increased earnings gap, and an increased need for more support of economic goals. However, research has barely begun to explore the functions of earned income, not to mention endowment funding. The major purpose of this study is to begin the exploration of endowment funding. Such exploration would be on the cutting edge of research.

Conclusions

By this point, it should be clear that non-economic goals, or values that arts policy could maximize, are not gained outside the realm of economics. As noted above, Touchstone (1980) asserts that contributions and government support -- types of intervention -- are needed to pursue non-economic goals such as publicness and creativity. Along with these types of intervention, earned income can be added to the list of revenue sources for the arts. In the same context as Touchstone, endowment funding -- one type of earned income -- is needed to pursue non-economic goals such as publicness and creativity. In the context of the natural division of labor theory proposed by DiMaggio, is there a relationship between endowment funding and the support of non-economic goals such as publicness and creativity, as well as growth
and cultural preservation? What is the nature and extent of the relationship between this type of economic intervention and the pursuit of these non-economic goals? This question can be tentatively answered by the research hypotheses developed for this study: In the presence of endowment funding, there would seem to be support of cultural preservation, since both concern future generations; support of access, since both concern low ticket prices; support of artistic opportunity, since both concern freedom from financial dependency; and support of organizational development, since both concern a need to balance economic and non-economic goals.
Design

The investigation was designed as an ex post facto type of research. It uses the static-group comparison design (Campbell & Stanley, 1963). In this design, the level of endowment funds is the naturally occurring event or the level of independent variable the units have self-selected. Arts organizations with varying levels of endowment funds were compared in terms of support of selected non-economic goals as measured by a mail questionnaire.

Kerlinger (1973) suggests formulating control hypotheses to describe the anticipated relationships between the extraneous variables and the dependent variable, in this case, the support level of selected non-economic goals (NEGs). Five extraneous variables have been identified for this investigation: discipline, budget size, age of organization, age of endowment fund, and the population of the area in which the organization is located.

Identification of these extraneous variables should also help to improve internal validity. According to Campbell and Stanley (1963) the major threats to the static-group comparison design are selection and selection/maturation interaction. In other words, comparing two selected groups that are naturally different will threaten validity.
For example, comparing new teachers to experienced teachers might threaten validity. Similarly, comparing young arts organizations with older arts organizations may threaten validity. Therefore, the extraneous variables that have been identified will attempt to lessen the differences among the organizations, helping to increase internal validity.

Population and Sample

The target population of this study contains the traditional arts organizations in the United States, that is, the nonprofit ballet companies, opera companies, symphony orchestras, and art museums. The service organizations for the four disciplines, which have been key providers of information in the past, are: OPERA America, American Symphony Orchestra League, Association of Art Museum Directors, and Dance/USA. Lists with current addresses were to be secured from these organizations to determine the accessible population. Due to a lack of initial funding, directories available as reference material in local libraries were used instead. A systematic sample was drawn from the accessible population. (Results of the investigation will be generalizable only to this accessible population. The reader is strongly encouraged to generalize the results to the target population -- the general community of traditional arts organizations.)

The sample size for this study was determined by taking ten percent of the accessible population. This produced a sample size of 128 from the population of 1,280 accessible arts organizations. Other methods exist to determine sample size. One example is a chart by
Krejcie and Morgan (1970) which provides predetermined sample sizes using built-in margin of error and confidence level. According to the chart, a sample size of 296 is needed to conduct the survey. However, initial funding was not available to conduct a survey of that proportion. Another method to determine sample size allows the researcher to plug into a formula: the degree of precision, t value, and estimated standard deviation \( n = \frac{t^2s^2}{d^2} \) where \( t = t \) value, \( s = \) estimated standard deviation, and \( d = \) degree of precision.) This method allows the researcher to determine the degree of precision if the sample size is pre-set. In other words, the smaller sample size used for this study yields a confidence level that the population values (the true scores had a census been taken, not a sample) would be between a slightly larger range than what it would have been using a larger sample size.

The sample was systematically drawn according to the following procedure. A number was selected from a random table of numbers to represent an arbitrary starting place. Every tenth organization on the lists was then chosen for the sample. The interval was determined by dividing the population size by the sample size.

Each organization selected for the sample was assigned an identification number ranging from 001 to 128. The list of sampling units and their numbers is being held in strictest confidence and is not included in this report. The arts organizations will not be identified by name, but rather, discussed as groups such as "art museums." This level of confidentiality was communicated to the sampling units.
Frame error in this study was controlled by using the most up-to-date listing of the arts organizations available. To control sampling error, Ary et al. (1985) suggests that the sample drawn should be as large as possible, at least ten to twenty percent of the accessible population. The sample drawn in this study was ten percent, adding some additional control for sampling error. Selection error was controlled for by a thorough search of the lists to be sure organizations were not listed more than once.

The directories used in this process were: Stern's Performing Arts Directory (1992) which provided listings for symphony orchestras, ballet and opera companies; and Art in America: Guide to Galleries, Museums, Artists 1991-92 and the American Museums Association's Official Museum Directory, 1991, both of which provided museum listings. Two museum listings were needed to verify the accuracy of the population sought for this study. Many listings in the AMA directory did not meet the definition of the traditional museum being sought. In some cases, the nature of a particular organization was not readily clear. For example, a listing might have read "The Bay City Arts Museum," but in fact housed only craft items by local artists. A cross-reference check had to be done to ensure the exact nature of the many listings. Excluded from the final accessible population list were organizations that showcase or are supported by the following: college, folk art, houses, ranches, taverns, armories, private collections, Indian grounds, old jails, art leagues, art associations, science, crafts, antiques, wood carvings, archeology, natural history, libraries, arts centers, studios, fine arts, foundations, branches of
larger museums, historical societies, and cultural arts centers. Also eliminated were museum collections that were specific, such as one artist or things like fly fishing, guns and coins, numerology, video, transportation, Tiffany glass, dogs, aquary, Boys Scouts, nature, etc.

These directories provided addresses as well as names of the organization's administrator. While the titles varied (director, executive director, manager, general manager) it was clear that this was the group of individuals for which the instrument was intended.

A copy of the proposal and a completed application form was submitted to the "Behavioral and Social Sciences Human Subjects Review Committee," pursuant to The Ohio State University regulations. The review is necessary to ensure the rights and welfare of the individuals participating in the study are properly protected. The committee determined this study was exempt from review.

Instrumentation

The following is a discussion of the steps taken to ensure the data-gathering instrument for this study was well-constructed. In the proposal stage of this project, it had always been assumed that the respondents would be contacted by mail and would be asked to rate the importance of "items" to reflect their pursuit of selected NEGs (see appendix for original instrument). The exact "items" to be included needed to be substantiated.

Hence, focus group interviews were conducted (by mail) in the fall of 1991. Over forty professionals familiar with arts policy or arts administration were invited to participate. Sixteen agreed to
participate and provided answers to a short questionnaire (see appendix for questionnaire and an example of the cover letter). Their task was to list up to ten conditions they thought might exist when an arts organization was pursuing each of the four NEGs. Although a variety of responses was gained, one of two things happened: either an item was mentioned enough times that it obviously should be included in the instrument or an item was implied by several responses even though the respondent did not use the same phrasing for the item. There were so many useful responses it was difficult deciding which ones to incorporate into the instrument. Originally, it was felt than ten items could sufficiently measure the importance a particular NEG to an organization. The focus group interviews uncovered items that were not previously thought of, so many in fact that the number of items for each NEG increased to sixteen. By the end of the focus group phase, a instrument with 64 items to be rated and 10 demographic type questions was ready to be analyzed for content validity before being administered to the sample (see appendix for revised instrument).

A review panel of faculty from The Ohio State University and arts administrators from the Columbus, Ohio area examined the questionnaire to identify vagueness or shortcomings and determine, in their opinion, if the questionnaire would provide the answers that were being sought. The review panel was well versed in the following areas: instrumentation, policy, and arts administration. The changes made to the questionnaire as a result of their suggestions are described briefly below.
Slight modifications were made to the instructions. Although the instrumentation experts thought the instructions were clear and acceptable, others thought they were too much like a timed test. The tone of the instructions was softened a bit. More importantly though, was the prevailing question about the length of the instrument. Most felt that even though 64 items might not take very long to rate, it had the "appearance" of being a time-consuming task that might cause many not to respond. In an effort to preserve a decent response rate, it was decided (after many hours of careful deliberation) to shorten the instrument to 12 items per NEG, a total of 48 items to rate. The demographic questions remained the same. The items that were deleted were those items that many of the panel members questioned as to wording or meaning. An example of this was the item "affordable prices" under the NEG access. While it was meant to mean prices charged for admission or ticket prices, it could also mean -- as it was pointed out by a panel member -- did the organization seek affordable prices when purchasing supplies, equipment, etc. Each item was read and re-read several times to look for items that might be misinterpreted. Thus, a shortened instrument with 48 items and 10 demographic questions was ready for a field and pilot test.

The questionnaire was administered as a field test to a small group of arts administrators from the Columbus, Ohio area to solicit their advice. The arts administrators had the characteristics of the proposed sample. (As an alternative, a sub-sample of the accessible population could have been drawn. But, to save time and money, local talent was called upon to assist in the field test.) Answers to the
following questions were sought in this phase of instrument development: Are the questions and instructions clear? Will the subject be motivated to answer the questionnaire? Will the subject be able to answer without concern about disclosing financial information? How long will the questionnaire take to complete? Will the respondents possess the correct information, will they give socially acceptable answers, will the answers be truthful? In this field testing phase, the group of arts administrators was also asked questions regarding face validity; that is, does the instrument look like it is measuring what it claims to be measuring. The responses to these questions were reaffirming -- yes, the questions and instructions are clear; yes, the motivation would be there to respond; the questionnaire should take 10 - 15 minutes to complete; yes, executive directors could provide the answers being sought and most often should be correct.

Concerns about reliability were addressed as follows. Since the measurement device used summated scales, a Cronbach's alpha test was performed. A small group of 40 organizations was selected randomly from the accessible population lists to serve as a pre-test group. This sample was drawn after the larger sample was drawn, using the same procedure described above. These organizations selected were not selected in the larger sample. The instrument was administered to the group by mail. A letter was enclosed with the questionnaire requesting assistance from the administrators in improving the instrument which would then be used at a later time in a national random sample of arts administrators (see appendix for example). The response rate for this pilot test was 65%.
A computer analysis using SPSS was performed on their responses. Each of the four NEGs being measured had a separate alpha, all around .90 (see appendix for computer results). The analysis did not suggest that removal of any items would improve the alpha significantly.

There were no comments included with the responses to indicate any problems with the instrument, neither with the instructions nor with the items to be rated. However, the question that asked respondents to provide a percentage of how the interest earned on the endowments was spent was a disaster. It was intended to get an indication of how organizations are spending their interest. A common ratio for spending endowment interest is 60:30:10; 10% to cover administrative expense, 30% to be reinvested, and 60% used as operating income. The responses to this question received in the pilot study ranged from question marks to 4.8%, which was interpreted to mean that was probably the average interest rate that organization was earning on their endowments. The question was reworded for the final instrument and an example was included to show how the three percentages would total 100%. A category "other" was included. Another minor change was on the questions that asked for total amount of endowment funds. Previous drafts of the instrument did not include a category "not applicable". This was a definite oversight because indeed such a category was needed since the instrument was being completed by organizations which did not have endowments.
Data Collection

A major advantage of using the mail questionnaire is the opportunity to reach a larger number of subjects from a greater variety of places across the United States. Personal interviews would not permit such an opportunity. Additionally, a questionnaire will allow the subjects to a) answer confidentially without influence from an interviewer and b) answer at a convenient time.

A drawback in using the questionnaire is the possibility of a lower completion rate than that of the interview. A higher response rate is often found, though, among "the more intelligent, better educated, more conscientious, and more interested or generally more favorable to the issue involved in the questionnaires" (Ary, 1985, p. 345). Ideally, a 100 percent response rate might be desired, but a rate that falls between 60 - 75 percent would be more realistic for this survey. The following steps were taken to improve response rate, which ended up to be 65%.

A cover letter addressed to a person by name and title was included with the questionnaire. Ary et al. (1985) suggests the letter include the following elements: purpose of the study, request for cooperation, protection provided the respondent, sponsorship of the study, promise of results, appreciation, recent date on the letter, and request for immediate return. Additionally, an influential signature on the cover letter would be helpful. Therefore, The Ohio State University letterhead was used to identify it as an affiliated organization. The letter was signed by the Associate Dean, College of
the Arts. An addressed, stamped return envelope was provided for returning the completed questionnaire.

Follow-ups were mailed to ensure a higher response rate. The number of responses as a result of the first mailing was 66, as a result of the second mailing and postcard reminder, 15. A second follow-up was mailed 14 days after the original mailing, consisting of a cover letter similar to the first and another questionnaire and return envelope. A postcard reminder was sent after this to those who had not yet responded to the first or second mailing. The postcard stressed one last time the importance of the subject's response to the study and expressed gratitude for participating. Afterwards, any subjects who did not return their questionnaire was considered a non-response.

A coding system was implemented to keep track of responses. The first set of questionnaires mailed was numbered from 001A through 128A. The second set of questionnaires was numbered from 001B through 128B.

To control for non-response error the following procedure was followed. Research has shown that late respondents are often similar to non-respondents. For the purpose of this study, it was assumed that late respondents were typical of non-respondents. Respondents were dichotomized as early and late respondents, those responding to the first mailing compared with those responding to the second mailing. The two groups were compared statistically to ascertain any differences between the groups. Since no differences were found, replies from the non-respondents were presumed to be typical of late respondents. Thus,
it was safe to discuss the results with little worry of non-response bias.

The following is a description of details related to the mailings. The mailings consisted of a packet containing: the mailing envelope, the cover letter, the questionnaire, and a return stamped envelope. The cover letter of the first and second packet (see appendix) were similar. The second letter varied only slightly, urging the respondent a little more to complete the questionnaire and apologizing if the questionnaire and second packet crossed in the mail. The cover letter was on white OSU stationary, standard size paper, 8 1/2 by 11. The cover letters were each signed in ink to convey the idea that personal effort went into this project.

The questionnaire was printed as a booklet, folded in the middle and stapled to form a 6 1/8 by 8 1/4 inch booklet. The paper color was off-white, and was 70 pound in weight. The front cover contained only the date and title of the study. The back cover was blank. Participants were invited to use the blank back cover for comments.

The return envelope, a standard #9 envelope, was included in a larger #10 mailing envelope. The larger envelope also contained the OSU logo and return address for the Department of Art Education. All envelopes used in the mailings -- both the mailing envelope and the return envelopes -- were stamped as opposed to metered. No personal names appeared on the questionnaire, however my name did appear on the return envelope. The return address also consisted of the following lines: Arts Policy Research; Department of Art Education; The Ohio State University; and the department address.
The following section addresses the handling of returned data. If the returned questionnaire was not more than or 80 percent complete, it was not used. If a respondent did not answer a question, the mean of that item was to be used for the missing answer, but this did not occur. If a large percentage of respondents failed to answer a certain question, greater than 20 percent, the item was to be eliminated, but again, this did not occur. Questionnaires returned completely blank were to be eliminated from the study. Responses containing nonsense data, such as two or more choices circled, check marks over several lines, written answers instead of circled answers, or a space between choices circled, were to be eliminated. Nonsense data will not be interpreted but reported verbatim. (See appendix for summary of events related to data collection.)

Analysis

The results of the survey were analyzed as follows. First, data was summarized and described using descriptive statistics: that is, percentages, means, and frequencies. Second, data was tested for existing relationships using contingency analysis, also called the chi-square test of independence. (It can not be assumed that a linear relationship exists between any of the variables since no prior research has been conducted on this theory. Therefore, Pearson's r can not be used to determine relationships.)

According to the objectives of the study, the analysis sought to determine existing relationships between the independent variable and the dependent variable; the dependent variable and the extraneous
variables; and the independent variable and the extraneous variables. Contingency tables were developed for each of the relationships. Hypothesis testing was performed at a predetermined alpha level of .10. This alpha is a commonly used alpha for research that can not be supported by previous research. It provides a fair level, not too low, not too stringent.

Table 2 presents an example of how the contingency analysis was used to test a hypothesis. In the example, the relationship between a dependent variable (access) and one of the extraneous variables (age of organization) is tested for independence. There was a total of 29 contingency tables or tests. The level of endowment funds compared with each of the four NEGs produced four tests. Each of the five extraneous variables compared with each of the four NEGs produced 20 tests. Each of the five extraneous variables compared with the level of endowment funds produced five tests. (See appendix for complete set of tables.) The results of the data analyses are presented in Chapter IV. Conclusions based on this data are presented in Chapter V.

Additionally, it should be noted that a Cronbach's alpha analysis was performed on the responses to determine instrument reliability. Much like the analysis on the pilot test data, the four NEGs being measured had a separate alpha, all around .90 (see appendix for computer results). The analysis did not suggest that removing any items would improve the alpha significantly.
Table 2. -- Contingency analysis example.

Hypothesis 7: There is a relationship between the support level of selected values and the age of the organization.

H₀: Support level is independent of age level of organization.
H₁: Support level is not independent of age level of organization.

alpha = 0.10
d.f. = 6

Dependent Variable 1 (support of access)

<table>
<thead>
<tr>
<th>Age level of organization</th>
<th>Support Level 0 - 25</th>
<th>25 - 50</th>
<th>50 - 100</th>
<th>100 - 150</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Fo = 12.0</td>
<td>Fo = 43.0</td>
<td>Fo = 87.0</td>
<td>Fo = 158.0</td>
</tr>
<tr>
<td></td>
<td>Fe = 37.5</td>
<td>Fe = 54.7</td>
<td>Fe = 84.0</td>
<td>Fe = 123.8</td>
</tr>
<tr>
<td>Medium</td>
<td>Fo = 18.0</td>
<td>Fo = 20.0</td>
<td>Fo = 18.0</td>
<td>Fo = 4.0</td>
</tr>
<tr>
<td></td>
<td>Fe = 7.5</td>
<td>Fe = 10.9</td>
<td>Fe = 16.8</td>
<td>Fe = 24.8</td>
</tr>
<tr>
<td>Low</td>
<td>Fo = 20.0</td>
<td>Fo = 10.0</td>
<td>Fo = 7.0</td>
<td>Fo = 3.0</td>
</tr>
<tr>
<td></td>
<td>Fe = 5.0</td>
<td>Fe = 7.3</td>
<td>Fe = 11.2</td>
<td>Fe = 16.5</td>
</tr>
</tbody>
</table>

50 73 112 165 400 = N

Decision rule:
If \( X^2 \leq X^2 \text{critical} \), accept H₀
If \( X^2 > X^2 \text{critical} \), reject H₀

Since \( X^2 = 127.7 > X^2 \text{critical} = 10.645 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.

CHAPTER IV

RESULTS

Information is presented first in this chapter to describe the demographic and financial characteristics (the extraneous variables) of the respondents. Second, results of the data analysis are presented and briefly discussed. In all, 29 combinations of variables were examined, illustrated by the matrix presented in Table 3. The analysis included tests between the dependent variables (the four non-economic goals) and the independent variable (level of endowment fund); between the dependent variables and the extraneous variables (discipline, budget size, age of organization, age of endowment fund, and population); and lastly, between these same extraneous variables and the independent variable. The purpose of these tests was to determine if a relationship exists between the variables. Contingency analysis was used. This statistical procedure tests for independence, a relationship does not exist if the variables are independent of each other. For each test, an hypothesis was formulated. Each hypothesis states that a relationship exists between two particular variables. Each hypothesis was either accepted or rejected as a result of the analysis. An accepted hypothesis would mean that indeed a relationship exists, rejecting an hypothesis would mean that a relationship does not exist.
Table 3. -- Contingency Tables Developed for Data Analysis

<table>
<thead>
<tr>
<th>DV/IV</th>
<th>DV/EV</th>
</tr>
</thead>
<tbody>
<tr>
<td>V1 SL/EFL Access</td>
<td>V1 SL/EV1</td>
</tr>
<tr>
<td>V2 SL/EFL Artistic Opportunity</td>
<td>V2 SL/EV1</td>
</tr>
</tbody>
</table>

IV/EV

| EFL/EV1  | EFL/EV2  | EFL/EV3  | EFL/EV4  | EFL/EV5 |
| Lvl. of Endowm. | Lvl. of Endowm. | Lvl. of Endowm. | Lvl. of Endowm. | Lvl. of Endowm. |

KEY:
DV = Dependent variable
V1 - V4 = Variables one through four
SL = Support Level
IV = Independent variable
EFL = Endowment fund level
EV1 - EV5 = Extraneous variables one through five
The sample population consisted of 128 arts organizations: 36 art museums (28%), 27 ballet companies (21%), 13 opera companies (10%), and 52 symphony orchestras (41%). The sample was roughly 10 percent of the accessible population that conformed to the definition of "arts organization" for this study. Two mailings and one follow-up reminder produced 82 responses: 73 were determined to be usable, 9 were determined not usable (non-deliverables, those who communicated their unwillingness to participate, responses that were less than 80% complete, and responses that trickled in weeks after the deadline).

To control for non-response error, two groups were compared--those who immediately returned a completed questionnaire and those who returned a questionnaire at the very end. T-tests were used. There were no differences between these two groups among the dependent variables of this study. Research (Norland, 1990, p. 57) has shown that non-respondents are similar to late respondents, and since the late respondents were similar to the early respondents, it can be assumed that non-respondents are similar to respondents. Therefore, it can be assumed that responses can be generalized to the sample.

Among the 73 organizations that responded, there were 21 art museums (29%), 12 ballet companies (16%), five opera companies (7%), and 35 symphony orchestras (48%). This response group can be described further from the data obtained in Section Two of the questionnaire.

As for the age of the organizations (determined as the number of years since the organization was first established), four are ten years old or less, ten are 11 - 20 years old, 15 are 21 - 30 years old, 18 are 31 - 40 years old, 11 are 41 - 50 years old, 10 are 51 - 60 years
old, four are 61 - 70 years old, and one is 81 - 90 years old. This produced a nicely shaped bell curve as illustrated in Figure 2.

Most of the organizations, 52 of the 73 or 71% are located in cities with populations that range between 1 - 499,999. Eight or 11% are located in cities with a population between 500,000 - 999,999; five (or 7%) with a population between 1,000,000 and 1,499,999; one (or 1%) with a population between 2,000,000 and 2,499,999; two (or 3%) between 2,500,000 - 2,999,999; two (or 3%) with a population between 3,500,000 - 3,999,999; one (or 1%) between 4,500,000 and 4,999,999; and two (or 3%) between 7,000,000 or more. These figures are summarized in Figure 3.

Figure 2. — Ages of Organizations
<table>
<thead>
<tr>
<th>QUANTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
</tr>
<tr>
<td>25</td>
</tr>
<tr>
<td>08</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>0</th>
<th>01</th>
<th>02</th>
<th>01</th>
<th>02</th>
<th>01</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
</tr>
</tbody>
</table>

**POPULATION LEVELS**

- **H** = 3,500,000 - 3,999,999
- **I** = 4,000,000 - 4,499,999
- **J** = 4,500,000 - 4,999,999
- **K** = 5,000,000 - 5,499,999
- **L** = 5,500,000 - 5,999,999
- **M** = 6,000,000 - 6,499,999
- **N** = 6,500,000 - 6,999,999
- **O** = 7,000,000 OR MORE

---

**Figure 3. -- Population of cities.**

**Figure 4 illustrates information about total operating budgets of the organizations.** Most of the organizations, 37 (or 51%) have operating budgets between $1 - 499,999; 15 (or 21%) have budgets between $500,000 - 999,999; three (or 4%) between $1,000,000 - 1,499,999; four (or 6%) between $1,500,000 and 1,999,999; five (or 7%) between $2,000,000 - 2,499,999; two (or 3%) between $4,000,000 - 4,499,999; one (or 1%) between $5,000,000 - 5,499,999; one (or 1%) between $6,000,000 - 6,499,999; one (or 1%) between $6,500,000 -
6,999,999; and four (5%) with an operating budget of $7,000,000 or more.

Question 52 on the questionnaire asked respondents to identify the type of financial support that their organizations receive the most of. Twenty-six organizations (1 art museum, 7 ballet companies, 17 symphony orchestras, and 1 opera company -- 35%) responded "Admission fee or ticket sales"; 19 (5 art museums, 1 ballet company, 11 symphony orchestras, and 2 opera companies -- 26%) responded "Individual support"; eight (7 art museums and 1 symphony orchestra -- 11%) responded "Local Government support"; seven (4 art museums, 1 ballet
company, 0 symphony orchestras, and 1 opera company — 10%) responded "Foundation support"; seven (2 ballet companies, 4 symphony orchestras, and 1 opera company — 10%) responded "Corporate support"; three (3 art museums — 4%) responded "Interest from endowment funds"; and three (1 art museum, 1 ballet company, and 1 symphony orchestra — 4%) responded "Other". One respondent who circled the category "other" parenthetically listed "rental income" to better describe the source of other income. It might be interesting to note that no one circled either "Federal Government support" or "State Government support". Also of interest, symphony orchestras, opera companies, and ballet companies received the most income from "admission fee or ticket sales" and "individual support", while art museums received the most from "local government support" with "individual" and "foundation support" as well as "interest from endowment funds" not far behind. This is illustrated in Figure 5.

Question 56 was included as a check on who actually responded to the questionnaire. This was important to ensure the responses were coming from the highest executive in the organization, someone who could speak best about the organization, not someone who may be less familiar with the entire operation of the organization. Almost all of the answers for this question indicated that the director or executive director or general manager did indeed complete the questionnaire. A few were returned with the reply "Interim Director" which was determined to be acceptable. One discrepancy may be worth noting though: while the directories used for this study listed many of the
people as directors, the responses to this question indicated they were
often executive directors.

Although a section was provided for respondents to make comments
about the questionnaire or study in general, only one respondent
provided comments. The comments though provided information about the
organization (fee structure, operating hours, staff composition) and
were not relevant to the study or the results. One response, which was
less than 80% complete and not used in the analysis, contained many
question marks, scribbles, arrows, words or comments like "what?" etc.
The respondent apparently gave up halfway through but returned the
questionnaire nevertheless. Another response received and used in the
analysis did point out that question 46 contained a typographical error. The word "fim" should have read "film." The location of the mistake -- in parenthesis and next to the word video -- probably helped to alleviate any misunderstanding as to what was meant. This question was answered by all of those in the response group, which should indicate that it did not affect validity.

The remaining informational questions asked in Section Two pertain to endowment funds. Seventy percent of the respondents (51) have endowment funds while 30% (22) do not. Of the 51 organizations which have endowments, 38 (or 75%) reported the values of the endowments (determined either by summing all the individual endowment funds or listing the total if the endowment funds have been pooled) to be between $1 - 1,999,999; four (or 7%) between 2,000,000 - 3,999,999; three (or 6%) between 4,000,000 - 5,999,999; one each (or 2%, 2%, and 2%) between 8,000,000 - 9,999,999, 10,000,000 - 11,999,999, and 12,000,000 - 13,999,999; and three (or 6%) with 20,000,000 or more. Figure 6 illustrates these totals.

As for the age of the oldest endowment fund (determined by the number of years since it was first established), 34 (or 67%) have an endowment with an age of 10 years or less; four (or 8%) have one between 11 - 20 years; five (or 10%) between 21 - 30 years; two (or 4%) between 41 - 40; three (or 6%) between 41 - 50; and one (2%) between 51 - 60. Note that two organizations with endowments (4%) replied "not applicable" to this question. Figure 7 illustrates these numbers.

In the age category "10 or less", 32 of the 34 organizations have endowments with a value between $1 - 1,999,999; one organization has an
Figure 6. -- Value of Endowments.

endowment fund valued between $2,000,000 - 3,999,999; and one has one valued between $12,000,000 - 13,999,999. In the age category 11 - 20, there is one organization with each of the following values $1 - 1,999,999, $2,000,000 - 3,999,999, $4,000,000 - 5,999,999, $8,000,000 - 9,999,999. In the age category 21 - 30, three of the five organizations have endowments valued between $1 - 1,999,999; one organization with an endowment valued between $2,000,000 - 3,999,999; and one organization with a value between $4,000,000 - 5,999,999. In the category 31 - 40, the two organizations reported the values of their endowments as one each between $1 - 1,999,999 and $4,000,000 - 5,999,999. In category 41 - 50, one organization reported the value of
its endowment to be between $10,000,000 - 11,999,999; and two reported values as $20,000,000 or more. In category 51 - 60, one organization (an art museum) reported having an endowment valued at $20,000,000 or more.

The breakdown of these endowment by discipline include: In category "10 or less" 9 art museums, 4 ballet companies, 19 symphony orchestras, and 2 opera companies. In the category 11 - 20, there is one art museum, one ballet company, and two symphony orchestras. In the category 21 - 30, there is three art museums and two symphony orchestras. In the category 31 - 40, there is one art museum and one
symphony orchestra. And, in the categories 41 - 50 and 51 - 60, there are three art museums and one art museum, respectively.

Four interesting points can be made at this point: one, that most of the endowments are very young in age and very small in size; two, that the larger endowments are older in age; three, art museums seem to have most of the older endowments; and four, none of the endowments were older than 60 years. More about this in Chapter 5.

Question 57 inquired about how the interest earned on the endowments is being used. Of the 51 organizations with endowments, 2 responded that this type of information was not available; 21 reported that 100% of the interest was being used as operating income; 10 reported that 90 - 99% of the interest was being used as operating income; 2 reported between 80 - 89% of interest used as operating income. Although a recommended formula for spending endowment fund interest is 60:30:10 -- 60% as operating income, 30% as reinvestment, and 10% as administrative expense -- 65% of the organization responding to this question are spending much more toward operating income. This becomes a dangerous practice over the years as inflation begins to diminish the value of the endowment fund and little reinvestment has been made to offset that effect. Sixteen or 31% did however report 60% or less of the earned interest was being used as operating income. Twelve percent in fact reported reinvesting 100% of the interest earned. Both of the very largest endowments ($20,000,000 or more) reported spending 60% or less on operating income.

This now concludes the descriptive portion of the data that was made available from Section Two of the questionnaire. The following
begins the discussion of the data gained from Section One of the questionnaire.

Unfortunately, conditions -- mainly a lack of funds at the onset -- prohibited doing a larger mailing. Originally, it was proposed to draw a sample that was 20 - 25% of the accessible population, or 256 to 320 organizations. Limiting the sample size to ten percent presented one challenging problem in the data analysis phase. Contingency analysis requires that each cell contains a number greater than or equal to five. As an example, ten levels were provided to determine the age of an organization. At least five responses to each of those levels were needed to use them all in contingency analysis. With 73 responses, many of the levels had numbers less than five. Most levels had to be combined. This held true for all of the 29 tests. The result was that most of the variables contained only two levels. For example, in analyzing the age of the organization, the data were combined into two levels: "10 or less" and "11 or more".

There is one additional change from the original proposal. As for the support level of the non-economic goals, the study was originally designed to distinguish the responses as "high," "medium," or "low." After some reflective thinking, it was decided to present the data straightforward rather than make evaluative judgments about the support levels. Therefore, instead of using a high, medium, or low category, the support levels are presented as, for example, 0 - 48, 49 - 60, 60-72. One of the reasons for this change is that in some cases -- mainly on the variable "organizational development," where the support levels were considerably higher than with the other variables -- there was an
inconsistency. High, medium, and low did not and could not always signify the same numbers. The category "Low" in some cases might have signified a level of 0 - 36 while in other cases it would have meant a level between 0 - 48. And once again, probably because of the smaller sample size used, not enough responses were received so that each level could be used. That is, for example, only 1 or 2 respondents had a support level that fell in the range 0 - 12. Therefore, this cell, because it had less than five, could not be used by itself in the analysis; the cell had to be combined with others. This explains why the categories "0 - 36" or "0 - 48" were used.

Mean scores of the support level for each of the four selected non-economic goals are presented in Table 4 below. The scores are presented for each of the disciplines as well as for the total group.

Table 4. — Mean scores of the support levels for the four NEGs.

<table>
<thead>
<tr>
<th>NON-ECONOMIC GOAL</th>
<th>ARTISTIC OPPORTUNITY</th>
<th>ORGANIZATIONAL DEVELOPMENT</th>
<th>CULTURAL PRESERVATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISCIPLINE (#)</td>
<td>ACCESS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Art Museums (21)</td>
<td>50.33</td>
<td>41.04</td>
<td>55.09</td>
</tr>
<tr>
<td>Ballet Cos. (12)</td>
<td>50.91</td>
<td>52.00</td>
<td>57.16</td>
</tr>
<tr>
<td>Symphonies (35)</td>
<td>39.14</td>
<td>37.77</td>
<td>51.80</td>
</tr>
<tr>
<td>Opera Cos. (05)</td>
<td>44.20</td>
<td>52.20</td>
<td>56.00</td>
</tr>
<tr>
<td>TOTAL GROUP (73)</td>
<td>44.64</td>
<td>42.04</td>
<td>53.91</td>
</tr>
</tbody>
</table>
The results of the data analysis -- the acceptance or rejection of the 29 hypotheses -- are presented below. The complete tables for each of the tests are included in the appendix. The matrix table presented earlier in this chapter is presented again in Table 5, immediately after the results. The matrix in Table 5 now contains either "YES" or "NO" beside each test to signify whether a relationship exists or not.

Hypothesis # 1: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, access and level of endowment funds.

Hypothesis # 2: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, artistic opportunity and level of endowment funds.

Hypothesis # 3: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, organizational development and level of endowment funds.

Hypothesis # 4: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, cultural preservation and level of endowment funds.

Hypothesis # 5: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, access and discipline.

Hypothesis # 6: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, artistic opportunity and discipline.

Hypothesis # 7: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, organizational development and discipline.

Hypothesis # 8: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, cultural preservation and discipline.

Hypothesis # 9: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, level of endowments and discipline.
Hypothesis # 10: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, access and budget size.

Hypothesis # 11: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, artistic opportunity and budget size.

Hypothesis # 12: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, organizational development and budget size.

Hypothesis # 13: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, cultural preservation and budget size.

Hypothesis # 14: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, level of endowment funds and budget size.

Hypothesis # 15: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, access and the age of the organization.

Hypothesis # 16: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, artistic opportunity and the age of the organization.

Hypothesis # 17: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, organizational development and the age of the organization.

Hypothesis # 18: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, cultural preservation and the age of the organization.

Hypothesis # 19: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, level of endowment funds and the age of the organization.

Hypothesis # 20: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, access and the age of the endowment fund.

Hypothesis # 21: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, artistic opportunity and the age of the endowment fund.

Hypothesis # 22: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, organizational development and the age of the endowment fund.
Hypothesis # 23: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, cultural preservation and the age of the endowment fund.

Hypothesis # 24: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, level of endowment funds and the age of the endowment funds.

Hypothesis # 25: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, access and population size.

Hypothesis # 26: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, artistic opportunity and population size.

Hypothesis # 27: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, organizational development and population size.

Hypothesis # 28: Reject the hypothesis of independence and conclude that a relationship exists between the two variables, cultural preservation and population size.

Hypothesis # 29: Accept the hypothesis of independence and conclude that a relationship does not exist between the two variables, level of endowment funds and population size.
Table 5. -- Results Matrix.

<table>
<thead>
<tr>
<th>DV/IV</th>
<th>DV/EV</th>
</tr>
</thead>
<tbody>
<tr>
<td>V1 - NO</td>
<td>V1</td>
</tr>
<tr>
<td>SL/EFL Access</td>
<td>SL/EV1 YES</td>
</tr>
<tr>
<td>V2 - NO</td>
<td>V2</td>
</tr>
<tr>
<td>SL/EFL Artistic Opportunity</td>
<td>SL/EV1 YES</td>
</tr>
<tr>
<td>V3 - NO</td>
<td>V3</td>
</tr>
<tr>
<td>SL/EFL Organiz. Development</td>
<td>SL/EV1 YES</td>
</tr>
<tr>
<td>V4 - NO</td>
<td>V4</td>
</tr>
<tr>
<td>SL/EFL Cultural Preserv.</td>
<td>SL/EV1 NO</td>
</tr>
</tbody>
</table>

IV/EV

<table>
<thead>
<tr>
<th>EFL/EV1</th>
<th>EFL/EV2</th>
<th>EFL/EV3</th>
<th>EFL/EV4</th>
<th>EFL/EV5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lvl. of Endowm.</td>
<td>Lvl. of Endowm.</td>
<td>Lvl. of Endowm.</td>
<td>Lvl. of Endowm.</td>
<td>Lvl. of Endowm.</td>
</tr>
<tr>
<td>NO</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

KEY:
DV = Dependent variable
V1 - V4 = Variables one through four
SL = Support Level
IV = Independent variable
EFL = Endowment fund level
EV1 - EV5 = Extraneous variables one through five
CHAPTER V
CONCLUSIONS AND RECOMMENDATIONS

Based on the results of the data analysis, the following is a discussion of conclusions and recommendations. The objectives of this study will serve to guide this discussion. The three major objectives are illustrated by the results matrix, Table 5. Once again, these three objectives are to determine: a) the relationship between the independent variable and dependent variables, b) the relationship between extraneous variables and dependent variables, and c) the relationship between extraneous variables and independent variables. The other two objectives are to describe the demographic and financial characteristics of the arts organizations and to determine the support of the selected non-economic goals (NEGs). Since these last two objectives were discussed briefly in the previous chapter, this chapter focuses primarily on the first three major objectives.

Probably the most fundamental conclusion to be made here is that a relationship does not exist between endowment funds and the support or pursuit of the four NEGs selected for this study. This conclusion is based on the results of the four tests performed to determine the relationship between the independent and dependent variables. However, when the larger picture is examined, that is, when you consider some of
the other data produced in this study, some clues can be uncovered that might suggest why relationships do not exist.

To begin, there is a high number of organizations with endowment funds that are spending 100 percent of the earned interest as operating income. This might suggest that instead of supporting non-economic goals, the earned interest might be supporting economic goals, primarily day-to-day survival. This, along with the fact that the endowments are very young and very small in value, might suggest that this potential source of support for non-economic goals needs time to develop. Indeed, the fact alone that a high number of organizations are spending 100 percent of the interest suggests a need for better management of the funds. Likewise, the many organizations that are reinvesting the entire amount of interest earned have yet to tap this source of support for NEGs.

Based on these three factors -- that there seems to be a heavy reliance on endowments for operating income, that the endowments are young in age and small in value, and that the spending of endowment interest might be managed a bit better -- one might recommend that arts administrators see this as an opportunity to adopt a new approach to using endowments. That is, if the ideology now is to use endowments in a limited way, simply to make up for shortcomings in the short term, this ideology could be expanded.

It seems that the practice or accepted tradition may be to establish an endowment when the going gets rough, when other sources of income are dwindling, to use the earned interest as supplemental income, to replace one funding source with another. This is a short
term, reactionary approach. This perpetuates the notion that the arts can not be more self-sufficient. Granted, the arts in this country have traditionally been supported by various sources of unearned income. This reliance on unearned income has been one of the reasons the arts are always viewed as ancillary. The arts in this country were born of great patrons and have since been fortunate to add to their list of benefactors, support from corporations and foundations, public money, and various means of earned income. But in adopting new means of earning money, new approaches to funding the arts could be adopted as well. The arts should begin to think in the long-term and begin to take action. In regard to endowment funds, three specific actions could be taken in light of this study: a) diversify spending of endowment fund interest to include reinvestment and administration of the funds, b) acquire better management for the funds -- made possible in part by diversified spending, and c) heighten campaigns to increase endowment values, which can be better managed as a result of acquiring better management.

It may well be that in time, on its own, the use of endowments in the arts may develop into a more refined procedure. Keep in mind that the use of endowments in the arts is a fairly young practice. The opportunity exists to use endowments to meet more than economic goals. It may be also that endowments currently are being used to meet non-economic goals, ones that were not included in the study. Future research might need to include other non-economic goals for consideration. Regardless, future research most definitely needs to refine some of the variables used in the study. This was the first
study of its kind to explore the relationship between earned income sources and NEGs. The variables used in this study now need to be narrowed. More about this shortly.

The second area to focus on involves relationships between the extraneous variables and the dependent variables. The following is a brief discussion of the findings in this area and what specifically they mean. Also included are the findings in the third area that explored relationships between extraneous variables and the independent variable.

There is a relationship between the four selected NEGs and budget size. One might conclude that although these are non-economic goals, they are not possible outside the realm of economics, that budgets make or break the pursuit of NEGs. It is encouraging to see that budget is not related to the level of endowment funds, which would suggest that even the smallest of arts organizations might have endowments, that endowments are not limited to the very large and older organizations.

There is a relationship between population and three of the four NEGs, namely access, artistic opportunity, and cultural preservation. This is to say that the pursuit of these NEGs probably occur in more populated areas. Population however is not a determinant in the pursuit of organizational development. That is, organizational development most likely occurs in both smaller towns and big cities.

Organizational development also seems to occur regardless of the age of the organization. A relationship does not exist between the two. Very old and very young organizations strive to improve. But again this does not occur outside economic concerns. There is a
relationship between budget size and organizational development. There also is a relationship between type of discipline and organizational development, which is probably to say that some organizations find it easier to develop. This is probably true if art museums and symphony orchestras are the more popular art forms and receive more attention and more support than ballet and opera. It seems possible that these things would make it easier for an organization to develop.

There is a relationship between the different types of discipline and the NEGs access and artistic opportunity. This is not true though of cultural preservation, a relationship does not exist between the different types of disciplines and this NEG. Cultural preservation exists regardless of the type of discipline. Cultural preservation exists also with the assistance of budget size and population. And distinctively, for reasons explored next, cultural preservation is related to the age of the endowment.

Only two positive relationships occur between the two variables related to endowments (which are, the level of endowment funds and the extraneous variable "age of endowment"). The first positive relationship is between cultural preservation and age of endowments. Since cultural preservation is also related to budget size and population, one might conclude that the larger budget, big city type organizations with older endowments are concerned with cultural preservation. However, larger budget and big city type does not influence the endowment fund level. Therefore, it can not be said that the organizations that support cultural preservation have larger endowments, but rather simply older endowments. (The only clear
relationship between level of endowment fund and any of the extraneous variables is between "age of the organization," discussed in more depth shortly). It is reasonable though that a larger budget, big city type organization with an older endowment would support cultural preservation. One explanation might be that the community surrounding an organization has probably invested much into the organization and the organization probably feels a strong obligation to repay the community through preservation.

One might suspect that over the years as the use of endowments increases and matures in nature that the NEG "cultural preservation" might be supported by endowment fund interest, that a relationship might develop between the two -- given current trends, that is. The use of endowments could change to a point where more NEGs are supported. At this point, guessing which NEGs might be supported is speculative; although with the given data, cultural preservation would seem to be among the strong contenders.

As mentioned above, the only clear relationship between level of endowment fund is with the variable "age of organization". This is the second of only two positive relationships between variables related to endowments. This supports earlier research (Crimmins and Keil, 1983) that suggests "older, more established nonprofits are likely to have endowments." Crimmins and Keil also claimed that part of the hierarchal effect included type of discipline, that the pecking order so to speak was symphony orchestras at the top followed by art museums, ballet companies and opera companies. However, the findings in this study would argue that discipline is not a factor in who has an
endowment, that endowments are probably just as common in symphony orchestras as in opera companies. Also, it can be argued that neither budget size nor population influence level of endowment funds. What does matter is the age of the organization and age of endowment. Indeed, the correlation matrix included in the appendix suggests the strongest correlation among the variables is between age of endowment and level of endowment. (Note, however, when looking at the correlations that in most cases the relationships are not linear.)

The following is a brief summary of where relationships occur among the dependent variables according to the contingency analyses. There is a relationship between the NEGs "access" and "artistic opportunity" and the extraneous variables "type of discipline," "budget size," "age of organization," and "population". In other words, one might say that a distinction between the support level of access and artistic opportunity can be traced to the differences in type of discipline, the budget size, location, and the age of the organization.

There is a relationship between the NEG "organizational development" and the variables "type of discipline" and "budget size" but not "age of organization" and "location". In other words, differences in support level for organizational development can be traced to the type of discipline and budget size. But organizational development is pursued regardless of "age of organization" and "location".

There is a relationship between cultural preservation and budget size and location but not between type of discipline nor age of organization. In other words, differences in this support level can be
attributed to the budget size and location. Cultural preservation is pursued regardless of type of discipline or age of organization.

Of course the imperative conclusion and recommendation to make here is that if the NEGs of access, artistic opportunity, organizational development, and cultural preservation are indeed important and top priority in the arts, then relationships should not exist between them and the extraneous variables. That is, if these NEGs truly are important and worth pursuing, if they are universal and common to all, then matters like budget size and age of the organization should not influence the pursuit of them. And if, as the findings here suggest, relationships do exist, the recommendation is that arts administrators need to work to eliminate these relationships. If universal access, for example, is important to the arts, then arts administrators need to pursue it regardless of where the arts organization is located, how long ago it was established, how large or small a budget it has, or what discipline it is. This is true for any NEG, that any non-economic goal should be pursued apart from any and all variables. And the relationships with variables that do exist need to be eliminated so that the benefits of NEGs can be enjoyed by all without prejudice.

The last area of this discussion briefly focuses on some conclusions that can be drawn from the informational and demographic data. Tests were not performed between Question 52 and any of the variables. This question asks what type of income the organization receives the most of, and was asked purely for information purposes. As an afterthought though, the question arose: is there a relationship
between endowment fund level and the type of income most received? That is, would, for example, an organization with high amounts of individual support be more likely to have endowments than one who received a lot of government support? The answer to this question, as a result of contingency analysis, is that a relationship does not exist between endowment fund level and type of income most received. Thus, any organization could be expected to have an endowment regardless of where their income was acquired.

As mentioned in Chapter IV, none of the participants responded that the source of income most received was from Federal or State Government support. Most responded that admission fee or ticket sales was the most common source of income. This is interesting because this is a type of earned income. This might suggest that arts organizations rely on earned income more than what is commonly known. Any research that continues exploration of this subject might consider looking to see if relationships exist between admission fee or ticket sales income and the support of selected NEGs in the arts.

Other highly received types of income reported by the respondents were individual support and local government support. This would suggest that the arts are perhaps decentralized or localized. This is interesting to note especially if it came down to choosing between expending energy to write a grant proposal to the NEA, to the state arts council, or to a local foundation, individual, or corporation. This study suggests perhaps the latter might be the better choice. This might also suggest that more work must be done if a more global view of the arts is truly an ambition for those in the arts.
One very basic but important finding in this study is that 70% of the respondents have endowment funds, 30% do not. It cannot be determined through the literature if any recent estimates exist on how many arts organizations do indeed have endowment funds. This may indeed be a benchmark estimate to use henceforth.

The mean scores of the support for each of the four NEGs, presented in Chapter IV, Table 4 can be summarized here by the following. The NEG "organizational development" had the highest overall mean of 53.91; followed by access with 44.64, artistic opportunity with 42.04, and cultural preservation with 41.65. Clearly, organizational development has the higher mean score among NEGs as they relate to importance to the overall objectives of the respondents. Yet, whether the ranking of these NEGs by importance has significance or not remains to be seen. It may be significant for at least one point. Some may feel that the artist is clearly the reason that the arts are "in business." Here, however, respondents have implied that the organization is important, followed perhaps by the consumer, then the artist, and finally, the future.

In all fairness, the mean scores translate to "great" and "very great" on the scale that was used. None of the scores suggest that the NEGs have little or no importance. Only a few percentage points separate some of the mean scores, so it should be safe to conclude that all the NEGs are of great importance to the responding organizations.

It may be interesting to note that the NEG organizational development had the highest mean score among each of the different disciplines. But even more interesting to note may be that the lowest
mean score among opera companies, ballet companies, and symphony orchestras was cultural preservation, while among art museums the lowest mean score was artistic opportunity. This is what one might expect if traditional roles are assigned to the different disciplines. That is, the performing arts seemingly deal more with artistic opportunity than cultural preservation and art museums seemingly deal more with cultural preservation than artistic opportunity. This is however a somewhat stereotypical viewpoint considering art museums do indeed provide artistic opportunity and performing arts do indeed provide cultural preservation. The obvious recommendation here of course is that arts administrators should continue to break the stereotypical images of arts organizations, to move organizations out of the old and into the new, to break new ground.

Finally, a few recommendations can be made regarding the mechanics of future research along these lines. The format worked well, a 65% return rate for a prototype instrument is not unsatisfactory. It is perhaps then a viable means to measure the importance of particular NEGs among arts organizations and worthy of future development. The instrument was able to cut across the disciplines, that is, both performing and visual arts organization were able to respond with fairly similar responses. To strengthen the measuring process, of course, more development should go into the instrument. A shorter version with ten items to rate instead of twelve might be tried.

There were no comments made, no complaints registered, which was personally rewarding, but moreover suggests that the instrument was not an inconvenience to the participants. This is especially important in
regard to non-response. If two-thirds of the sample completed the questionnaire, what is it that prevented the remaining third from doing so? Would an incentive have helped? What incentives would be appropriate? Perhaps if sufficient money and human resources exist, an offer for the participants to see a summary of the results might help response rate.

Two areas of the questionnaire can and perhaps ought to be cross-referenced: budget size and population. Membership guides exist in the individual disciplines from service organizations like Opera America that list such information pertaining to budgets and locale. (Money was not available at the beginning of this project to purchase these guides and local organizations were not willing to loan out their copies.) Having more exact information would help to produce a more refined picture of what is truly occurring.

Lastly, due to the requirements of the statistical calculations used in this study, the next inquiry like this will need a larger sample. This again will provide a more detailed account of what is occurring, less categories would have to be collapsed. An evaluation of what would be appropriate categories to use in future research is also possible based on the findings of this study.
REFERENCE LIST


SUMMARY OF PROCEDURES

Obtain lists of organizations and address

Determine sample size

Develop questionnaire
  - Small scale survey if necessary to determine further indicators of selected values

Validity check
  - Panel of experts
  - Field test

Reliability check
  - Pilot test/Cronbach's alpha test

Printing
  - mailing envelopes
  - initial cover letters
  - secondary cover letters
  - survey instruments
  - incentive cards
  - return envelopes
  - reminder cards

Purchase Stamps

Send first mailing packet

Send reminder card one week later

Send second mailing packet two weeks later

Determine usable data

Enter data

Compare early to late respondents

Run descriptive statistics and contingency analysis

Prepare report (Chapter four)

Discuss and draw conclusions (Chapter five)
<table>
<thead>
<tr>
<th>STEPS</th>
<th>ACTIVITIES</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAMPLING</td>
<td>Obtain mailing list from service organizations</td>
<td>Fall, 1991</td>
</tr>
<tr>
<td>DEVELOPMENT OF DATA-GATHERING</td>
<td>Re-writing questions, planning format and design, preparing cover-letters for initial and follow-up mailings.</td>
<td>Winter, 1991</td>
</tr>
<tr>
<td>INSTRUMENT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRETEST</td>
<td>Determine validity, reliability, suitability;</td>
<td>Winter, 1991</td>
</tr>
<tr>
<td>DISTRIBUTION</td>
<td>Printing; begin mailings</td>
<td>Winter, 1991</td>
</tr>
<tr>
<td>DATA PROCESSING</td>
<td>Data coding, computer processing interpretation and reporting</td>
<td>Spring, 1992</td>
</tr>
</tbody>
</table>
THE RELATIONSHIP BETWEEN ENDOWMENT FUNDING AND SUPPORT OF SELECTED VALUES IN THE ARTS
Thank you for agreeing to participate in this study. There are five parts to this questionnaire. Parts one through four are similar to each other. Part five is a little different than the other parts. Directions for each part are provided. Please read all directions carefully.

This questionnaire is being answered by both visual and performing arts organizations. Each question is tailored to include both types of organizations. Some questions provide examples that relate to each type of organization. Please read all questions carefully so that you can provide the most accurate answers possible.

PART 1

Arts organizations -- such as museums, opera companies, ballet companies, and symphonies -- often offer discounts on admission fees or ticket prices to attract a larger or more diverse audience. The following is a list of ways that such discounts can be offered. Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

<table>
<thead>
<tr>
<th>KEY:</th>
<th>1 = Not Important</th>
<th>2 = Moderately unimportant</th>
<th>3 = Slightly unimportant</th>
<th>4 = Undecided or Neutral</th>
<th>5 = Slightly important</th>
<th>6 = Moderately important</th>
<th>7 = Very Important</th>
</tr>
</thead>
</table>

Here is an example:

1. Discount admission fee/ticket price offered to children................ 1 2 3 4 5 6 7

By circling 6, this individual indicates that this item is moderately important.
KEY:  
1 = Not Important  
2 = Moderately unimportant  
3 = Slightly unimportant  
4 = Undecided or Neutral  
5 = Slightly important  
6 = Moderately important  
7 = Very Important  

Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.  

(Please circle answer)  

1. Offering discount admission fee or ticket price to students.............. 1 2 3 4 5 6 7  
2. Offering discount admission fee or ticket price to senior citizens..... 1 2 3 4 5 6 7  
3. Offering coupons for discount admission fee or ticket price in newspapers, magazines, flyers, mail campaigns, or other form of print material..... 1 2 3 4 5 6 7  
4. Offering coupons for discount admission fee or ticket price through promotions held with local business such as banks, grocery stores, department stores, etc.......................... 1 2 3 4 5 6 7  
5. Offering discount admission fee or ticket price during weekday (Monday through Friday) evening performances or exhibition hours.............. 1 2 3 4 5 6 7  
6. Offering discount admission fee or ticket price during weekday (Monday through Friday) morning performances or exhibition hours.............. 1 2 3 4 5 6 7
Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

(Please circle answer)

7. Offering discount admission fee or ticket price during weekday (Monday through Friday) afternoon performances or exhibition hours.................. 1 2 3 4 5 6 7

8. Offering discount admission fee or ticket price during weekend (Saturday or Sunday) evening performances or exhibition hours.................. 1 2 3 4 5 6 7

9. Offering discount admission fee or ticket price during weekend (Saturday or Sunday) morning performances or exhibitions...................... 1 2 3 4 5 6 7

10. Offering discount admission fee or ticket price during weekend (Saturday or Sunday) afternoon performances or exhibition hours............. 1 2 3 4 5 6 7
Arts organizations often focus attention on innovative works of art—whether the art is visual or performing art. The following is a list of ways that arts organizations can provide or enhance the creative process.

Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

**KEY:**

1 = Not Important  
2 = Moderately unimportant  
3 = Slightly unimportant  
4 = Undecided or Neutral  
5 = Slightly important  
6 = Moderately important  
7 = Very Important

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<th>NOT IMPORTANT</th>
<th>VERY IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Please circle answer)</td>
<td></td>
</tr>
</tbody>
</table>

1. Commissioning new works of art in the performing arts or acquiring new works of visual art........... 1 2 3 4 5 6 7

2. Out-of-town performances or exhibitions .................. 1 2 3 4 5 6 7

3. Expansion of the artistic staff (For example, increasing the number of paid musicians in your organization or increasing the number of artistic personnel to the staff of the museum)............................. 1 2 3 4 5 6 7

4. Creating new positions on the artistic staff of your organization (For example creating a position for an assistant artistic director if one has not previously existed)............... 1 2 3 4 5 6 7

5. Increasing the number of out-of-town performances or exhibitions........... 1 2 3 4 5 6 7
<table>
<thead>
<tr>
<th>KEY:</th>
<th>4 = Undecided or Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 = Not important</td>
<td>5 = Slightly important</td>
</tr>
<tr>
<td>2 = Moderately unimportant</td>
<td>6 = Moderately important</td>
</tr>
<tr>
<td>3 = Slightly unimportant</td>
<td>7 = Very Important</td>
</tr>
</tbody>
</table>

Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

6. Hiring artistic talent from your local area ................................................................. 1 2 3 4 5 6 7

7. Hiring artistic talent from areas other than your local area .............................. 1 2 3 4 5 6 7

8. Expanding the hours your museum is open or expanding the number of performances you offer during a calendar year .... 1 2 3 4 5 6 7

9. Spotlighting performances by local talent or exhibiting works of art by local artists .......................... 1 2 3 4 5 6 7

10. Searching outside of your local area for artistic talent either to perform or exhibit with your organization... 1 2 3 4 5 6 7
Arts organizations often make available to contemporary societies the works of art that have become models of the whole history of the arts. The following is a list of ways that arts organizations can educate or inform individuals about the great works of art from the past.

Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

<table>
<thead>
<tr>
<th>KEY:</th>
<th>0 = Not Important</th>
<th>4 = Undecided or Neutral</th>
<th>1 = Not Important</th>
<th>5 = Slightly important</th>
<th>2 = Moderately unimportant</th>
<th>6 = Moderately important</th>
<th>3 = Slightly unimportant</th>
<th>7 = Very Important</th>
</tr>
</thead>
</table>

1. Presenting educational lectures in conjunction with performances or exhibitions

2. Regarding the performing arts, presenting lectures before, after, or during intermission. Regarding the visual arts, presenting lectures daily during the exhibition.

3. Presenting the lecture at some other time than during the performance or the exhibition, for example, a week before the performance or the show opens.

4. Increasing the frequency of the lectures you currently offer.

5. Holding the lecture on-site, either in the museum or performing hall.
Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

(Please circle answer)

6. Holding the lecture off-site, at some location other than the museum or performing hall .................. 1 2 3 4 5 6 7

7. Offering lectures at neighborhood or local senior citizens gatherings .. 1 2 3 4 5 6 7

8. Offering lectures at neighborhood or local community centers............. 1 2 3 4 5 6 7

9. Offering lectures in the local schools about current or future performances or exhibits......................... 1 2 3 4 5 6 7

10. Increasing the number of individuals who attend the educational lectures offered by your organization ..... 1 2 3 4 5 6 7
PART 4

Arts organizations often focus attention on the daily operations of the organization itself, in order to create a more efficient and effective organization. The following is a list of ways that arts organizations enhance the development of an arts organization.

Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

<table>
<thead>
<tr>
<th>Item</th>
<th>Not Very Important</th>
<th>Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increasing the operating budget of the organization ................</td>
<td>1 2 3 4 5 6 7</td>
<td></td>
</tr>
<tr>
<td>2. Decreasing the deficit of the organization's operation ............</td>
<td>1 2 3 4 5 6 7</td>
<td></td>
</tr>
<tr>
<td>3. Increasing development activities ..</td>
<td>1 2 3 4 5 6 7</td>
<td></td>
</tr>
<tr>
<td>4. Expanding the non-artistic staff of the organization (examples: clerks, secretaries, administrators) ......</td>
<td>1 2 3 4 5 6 7</td>
<td></td>
</tr>
<tr>
<td>5. Creating new positions for non-artistic staff personnel ............</td>
<td>1 2 3 4 5 6 7</td>
<td></td>
</tr>
<tr>
<td>6. Adding new benefits to the current benefits provided to the non-artistic staff ..........................</td>
<td>1 2 3 4 5 6 7</td>
<td></td>
</tr>
</tbody>
</table>
KEY:
1 = Not Important
2 = Moderately unimportant
3 = Slightly unimportant
4 = Undecided or Neutral
5 = Slightly important
6 = Moderately important
7 = Very Important

Please rate each item as to its importance to the overall objectives of your organization by circling one of the numbers following each item.

7. Searching for non-artistic personnel from areas other than your local area (For example, conducting national searches) ....... 1 2 3 4 5 6 7

8. Addition of new facilities to the current operations .......... 1 2 3 4 5 6 7

9. Renovating the existing location that houses your organization ... 1 2 3 4 5 6 7

10. Moving the operations to a new location ...................... 1 2 3 4 5 6 7
In the following section, you are asked to place a check mark ( ) next to the category that applies best to your organization for each statement. The statements relate to demographic and financial characteristics of your organization.

Here is an example:

The type of financial support that our organization receives the most of comes from the following category:

- □ FEDERAL GOVERNMENT SUPPORT
- □ STATE GOVERNMENT SUPPORT
- □ LOCAL GOVERNMENT SUPPORT
- □ ADMISSION FEE OR TICKET SALES
- □ INCOME FROM ENDOWMENT FUNDS
- □ CORPORATE SUPPORT
- □ FOUNDATIONAL SUPPORT
- □ INDIVIDUAL SUPPORT
- □ GIFT SHOP/SNACK BAR SALES
- □ OTHER INCOME

By checking the category "LOCAL GOVERNMENT SUPPORT," this individual indicates that the major portion of funding for the organization comes from local government support.
Please place a check mark ( ) next to the category that applies best to your organization.

1. Our organization can best be described by the following type of discipline:
   - [ ] ART MUSEUM
   - [ ] SYMPHONY/ORCHESTRA
   - [ ] BALLET COMPANY
   - [ ] OPERA COMPANY

2. The total operating budget of our organization is:
   - [ ] $1 - 499,999
   - [ ] $500,000 - 999,999
   - [ ] $1,000,000 - $1,499,999
   - [ ] $1,500,000 - $1,999,999
   - [ ] $2,000,000 - $2,499,999
   - [ ] $2,500,000 - $2,999,999
   - [ ] $3,000,000 - $3,499,999
   - [ ] $3,500,000 - $3,999,999
   - [ ] $4,000,000 - $4,499,999
   - [ ] $4,500,000 and above

3. The age of our organization determined by the number of years since it was first established is:
   - [ ] 10 OR LESS
   - [ ] 11 - 20
   - [ ] 21 - 30
   - [ ] 31 - 40
   - [ ] 41 - 50
   - [ ] 51 - 60
   - [ ] 61 - 70
   - [ ] 71 - 80
   - [ ] 81 - 90
   - [ ] 91 OR MORE
Please place a check mark ( ) next to the category that applies best to your organization.

4. The age of our oldest endowment fund determined by the number of years since it was first established is:

- 10 OR LESS
- 11 - 20
- 21 - 30
- 31 - 40
- 41 - 50
- 51 - 60
- 61 - 70
- 71 - 80
- 81 - 90
- 91 OR MORE

5. The value of our endowment fund(s), determined either by summing all the individual endowment funds or listing the total if the endowment funds have been pooled, is:

- $1 - $1,999,999
- $2,000,000 - 3,999,999
- $4,000,000 - 5,999,999
- $6,000,000 - 7,999,999
- $8,000,000 - 9,999,999
- $10,000,000 - 11,999,999
- $12,000,000 - 13,999,999
- $14,000,000 - 15,999,999
- $16,000,000 - 17,999,999
- $18,000,000 and above

6. The population of the community in which we are located is:

- 1 - 499,999
- 500,000 - 999,999
- 1,000,000 - 1,499,999
- 1,500,000 - 1,999,999
- 2,000,000 - 2,499,999
- 2,500,000 - 2,999,999
- 3,000,000 - 3,499,999
- 3,500,000 - 3,999,999
- 4,000,000 - 4,499,999
- 4,500,000 and above

You have now completed the questionnaire. Thank you for your participation. If you have any comments that you would like to make about this questionnaire or study, please feel free to use the space provided on the inside of the back cover to do so.
BEHAVIORAL AND SOCIAL SCIENCES
HUMAN SUBJECTS REVIEW COMMITTEE (HSRC)
THE OHIO STATE UNIVERSITY

Date October 18, 1991

RESEARCH PROTOCOL:

91B0171  THE RELATIONSHIP BETWEEN ENDOWMENT FUNDS AND SUPPORT OF
SELECTED NON-ECONOMIC GOALS IN THE ARTS, James W.
Hutchens, Donald J. Glenn, Art Education

presented for review by the Behavioral and Social Sciences Review
Committee to ensure proper protection of the rights and welfare of
the individuals involved with consideration of the methods used to
obtain informed consent and the justification of risks in terms of
potential benefits to be gained. The Committee action was:

____  APPROVED          ______  DEFERRED*
____  APPROVED WITH CONDITIONS*    ______  DISAPPROVED
   X  NO REVIEW NECESSARY

*CONDITIONS/COMMENTS:

It was determined by the Committee that the protocol was EXEMPT
FROM REVIEW.

COMMENT: Exempting an activity from review doesn't not absolve the
investigator(s) of the activity from ensuring that the welfare of
subjects in the activity is protected and that methods used, and
information provided, to gain subject consent are appropriate to
the activity.
November 12, 1991

Dear : 

I am writing to request your help in the preliminary phase of a research project. About five minutes of your time is all that is needed. Your input is voluntary and completely anonymous; there are no numbers or coding system to identify your responses. Your name will not appear in any type of publication or report. You will not receive additional requests for help in this phase, this is a one time request. Your responses -- along with those from 40 other professionals in the arts -- will be used to substantiate a survey instrument that is being developed to administer in a national survey of arts organizations. This survey will be conducted in March 1992. I hope you can take a few minutes to complete this brief task, your contribution will certainly add significance to this project. Thank you in advance for your time.

Please return your reply in the pre-addressed, inter-office envelope no later than Friday, November 15, 1991.

Sincerely,

Donald Glenn
Graduate Administrative Associate
Department of Art Education
The Ohio State University
DIRECTIONS: Listed below are four goals that art museums, symphony orchestras, ballet and opera companies often strive for. I would like you to list up to ten conditions that you think might be present when an arts organization is striving to reach that particular goal.

For example, if the goal is "ARTS EDUCATION" one might expect to find the following conditions: education department, director of education, resource center, educational programming, lecture series, workshops, outreach programs, ties with a local college or university, etc.

Here now are the four goals.

THE FIRST GOAL IS: ACCESS
(Defined as "efforts to make the arts available for those who might otherwise choose not to attend because of real or perceived obstacles such as price, social standing, or proximity to the arts.")
PLEASE LIST ON THE FOLLOWING LINES UP TO TEN CONDITIONS YOU THINK MIGHT BE PRESENT IN AN ARTS ORGANIZATION (art museum, symphony orchestra, ballet or opera company) WHEN IT IS STRIVING FOR THIS GOAL:

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

THE SECOND GOAL IS: ARTISTIC OPPORTUNITY
(Defined as "efforts to provide or enhance the creative process.")
PLEASE LIST ON THE FOLLOWING LINES UP TO TEN CONDITIONS YOU THINK MIGHT BE PRESENT IN AN ARTS ORGANIZATION (art museum, symphony orchestra, ballet or opera company) WHEN IT IS STRIVING FOR THIS GOAL:

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
THE THIRD GOAL IS: ORGANIZATIONAL DEVELOPMENT
(Defined as "efforts to enhance the efficient or effective operation of an arts organization.")

PLEASE LIST ON THE FOLLOWING LINES UP TO TEN CONDITIONS YOU THINK MIGHT BE PRESENT IN AN ARTS ORGANIZATION (art museum, symphony orchestra, ballet or opera company) WHEN IT IS STRIVING FOR THIS GOAL:

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

THE FOURTH GOAL IS: CULTURAL PRESERVATION
(Defined as "efforts to make available to contemporary societies the works of art that have become models of the whole history of the arts.")

PLEASE LIST ON THE FOLLOWING LINES UP TO TEN CONDITIONS YOU THINK MIGHT BE PRESENT IN AN ARTS ORGANIZATION (art museum, symphony orchestra, ballet or opera company) WHEN IT IS STRIVING FOR THIS GOAL:

________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

Thank you for taking the time to complete this brief questionnaire. I have provided some space below for you to use if you would like to make any specific comments about this questionnaire or any comments in general.

Please return now the completed questionnaire according to the directions in the cover letter. Once again, thank you for your help.
Focus group responses to ACCESS:

**PRICE STRUCTURE:**
- modest prices
- some free days or occasional free programs for broad audiences/outdoor perhaps

**PRICE REDUCTION**
- coupon price reduction
- free ticket programs for targeted audiences
  - (underwritten if necessary)
- subsidy to eliminate financial barriers (new sources of funds to support this)
- scholarships
- well-promoted ticket discount programs
  - organizer of package deals

**PROMOTION**
- advertising that is free of art jargon
- advertising that steers away from being elitist
- location of advertisements/mainstream advertising and publicity
- advertising or marketing efforts aimed at inviting diverse constituencies in marketing staff
- targeted advertising of program offerings

**NON-THREATENING ENVIRONMENT:**
- a non-threatening, user-friendly environment
  - conveying the idea of a user-friendly environment through PSA, display advertising, etc.
  - demonstrating a user-friendly environment via in-house events, e.g. festivals, "pops concerts"

**OUTSIDE INFLUENCE:**
- contact with social or education institutions advisory groups from target audience
  - a core group "within the institution" that can represent the outside constituency's interests
  - outside expertise to guide the process of change
    - (leadership willing to support such change)

**LOCATE**
- convenient, safe, modest or free parking
- public transportation close-by
- programs in neighborhoods/communities that might have limited resources for transportation
- outreach programs in recreation centers

**EDUCATIONAL**
- a regular program on PBS TV - interviews, samples of programs, etc./information spots on radio/tv
- a regular feature in the local newspaper
- introductory information on the performance or exhibit

**PROGRAMMING**
- programs that address multicultural audiences
- programs that address multicultural interests
- sensitivity to diverse populations, i.e. ethnic, handicapped
- access for handicapped individuals
- program of interest to the constituency sought balanced program addressing diverse interests
- time of day/timing of day, year
Focus group responses to ARTISTIC OPPORTUNITY:

POLICY policy that permits a balance of support for emerging and traditional arts forms exhibition/performance venues for emerging and experimental arts forms and artists thorough understandings of artists needs and organizations ability to provide for them continuing education to support the understanding of the validity and imperative of artistic creation (within the organization and throughout the community)

ACCESS TO ARTISTS: improved access to artistic community open, healthy communication structure use of professional artists

VISITING ARTISTS: visiting artists programs studios for visiting artists artists-in-residence travel

MONETARY SUPPORT: financial support/grants for artists scholarship/internships offered competition - proposals review criteria - process additional rewards (money, credit, recognition) besides personal growth

FACILITIES: equipment/supplies top quality facilities that meet artists' needs top quality support staff workshop - studio space funds for workshops etc.

OUTREACH: outreach workshops/performances for all age groups outreach workshops/performances in schools outreach workshops/performances in community centers outreach workshops/performances for self-motivated adults and youngsters teachers/students eager to "do" masters workshops

CURRICULUM: organization of curriculum/objectives adequate time - good planning mechanisms timing of day, year (that workshops are offered)

INSTRUCTIONAL MATERIALS: make available visual and/or audio records of a very wide variety of things and events/archives video tapes of illustrated (demonstration) chats with artists
Focus group responses to ORGANIZATIONAL DEVELOPMENT:

LEADERSHIP: strong, clear, nurturing leadership (director) making sure that the community perception is not that of a closed corporation, a private club. Fundamental understanding of organizational strengths and weaknesses. Understanding and implementing sound business practices consistent with the organization's mission. Planned agenda, meetings, strategies. Political savvy - both internally and externally. A strong experienced group of supporters as a consortium (ways to welcome new members to continue).

SPECIFIC STAFF: development office or officer. Fiscal manager.


ORGANIZATIONAL STRUCTURE: regular communication between all levels of the organization. Communication among different departments. Collaboration among different departments. Collective decision making structures.

EXTERNAL AWARENESS: collaboration of less experienced organizations with more experienced organizations. Input from other organizations who have "made it." Models.

INTERNAL AWARENESS: research projects on efficiency/effectiveness evaluation of programs. Voluntary accreditation.


PLANNING: long range plans, clearly developed and articulated. Engagement in both short and long-range planning. Community input.
Focus group responses to CULTURAL PRESERVATION:

WHOLE HISTORY: definition of "whole history"
presentation of past in relationship to present
a view of the future not just the present and past

MODELS: activities and expertise to support inclusion of
"models" that represent the diversity of the
history of the arts.
policy that aims at representativeness of the
history of the arts
inspired comprehension of the relevance of the
models presented
inspired communication of that comprehension
a list of criteria to decide what is to be
preserved

CONTEMPORARY SOCIETIES:
an avid interest in contemporary societies (museums
sometimes lack this)
a dedication to not only preserve but collect
contemporary artifacts for future societies

PROGRAMMING: careful programming
culturally diverse programming
non-separatist approach to culturally diverse
programming
cross-cultural performances and exhibitions
regularity of performances/exhibitions

INPUT: community input for program development
participation of diverse cultural artists on
planning/programming committees
discourse with and understanding of artists

STAFF: art(s) historians on staff/coop with an historian
generalists (as well as specialists) on staff
a curator
adequate archival staff

FACILITIES adequate archival facilities - keeping visual
records
breadth of available documentation/resources
methods of documentation and presentation/film,
video reproductions available
facilities to share objects and events
adequate facility (space conditions appropriate to
task, etc)
display space, storage

EDUCATIONAL PROGRAMS:
an educating body of docents/educators
knowledgeable personnel
lectures
concern with public access
willingness to allow the public to respond/react
/ask questions that get real answers
Thank you for agreeing to participate in this study. There are two sections to this questionnaire, a total of 75 questions in all. Directions for each section are provided. Please read all directions carefully.

This questionnaire is being answered by executive directors of both visual and performing arts organizations. Each question is tailored to include both types of organizations. Some questions provide examples that relate to both types of organizations. Please read all questions carefully so that you can make the most accurate choice possible.

SECTION 1

In this section, there are sixty-four items, numbered 1 through 64. Please work on one item at a time before going on to the next item. Consider how important each item is to the overall objectives of your organization. You will then rate each item using a scale that ranges from "VERY UNIMPORTANT" to "VERY IMPORTANT". The scale that you will use is provided below. This same scale appears at the top of each page. Please take a moment now to carefully read the seven different choices on this scale that you will use to evaluate the importance of each item.

As an example, if you consider an item to be "MODERATELY IMPORTANT" to the overall objectives of your organization, you would rate this item with the corresponding number "6". After you have determined how important an item is to the overall objectives of your organization - based only on the seven choices in the scale above - please record your rating in the set of numbers that appears directly to the right of each item. In this example, because you rated the item "MODERATELY IMPORTANT" you would circle the number "6" in the set of numbers that appears directly to the right of this item.

Here is how this example would look:

<table>
<thead>
<tr>
<th>Scale</th>
<th>Very Unimportant</th>
<th>Slightly Important</th>
<th>Moderately Unimportant</th>
<th>Slightly Important</th>
<th>Moderately Important</th>
<th>Very Important</th>
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By circling the number 6, this individual indicates that this item is moderately important to the overall objectives of their organization.

PLEASE CIRCLE ONLY ONE ANSWER FOR EACH ITEM. DO NOT MAKE STRAY MARKS. DO NOT PLACE YOUR CIRCLE IN BETWEEN THE NUMBERS.

YOU MAY USE PEN OR PENCIL.

PLEASE RATE EACH ITEM ONE AT A TIME. COMPLETELY CONSIDER EACH ITEM. CIRCLE YOUR SELECTION, THEN MOVE ON TO THE NEXT ITEM.

PLEASE BEGIN.
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<tbody>
<tr>
<td>1. Affordable prices</td>
<td>1</td>
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<td>2. Some free days or occasional free programs for broad audiences</td>
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<td>3. Free admission or free ticket programs for targeted, specific audiences</td>
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<td>4. Special discounts for seniors, groups, minors, differently-abled</td>
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<td>5. Advertisement in broad range of media not only in media that reaches traditional audiences</td>
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<td>6. Advertising that seems away from being cliché</td>
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<td>7. Conveying the idea of a user-friendly environment through public service announcements, display advertising, and other communications</td>
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<tr>
<td>8. Demonstrating a user-friendly environment via in house events, for example, festivals, pop concerts, educational workshops, on site dozen programs</td>
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<td>9. Contact with outside social or educational institutions</td>
<td>1</td>
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<td>10. Advisory groups from diverse audiences</td>
<td>1</td>
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<td>11. Modest or free parking costs</td>
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<td>12. Public transportation close by</td>
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Based on the scale above, please rate how important each of the following items is to the overall objectives of your organization; then circle the number that corresponds to your answer to the left of the list. Then circle the number that corresponds to your answer in the set of numbers (1 through 7) that appears directly to the right of each item.

<table>
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<tr>
<td>13. A regular educational program on television, such as public access on cable or public broadcast, featuring interviews, samples of programming, etc.</td>
<td>1</td>
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<tr>
<td>14. A regular educational feature in the local newspaper</td>
<td>1</td>
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<td>15. Programming that addresses multicultural interests</td>
<td>1</td>
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<td>16. Programming offered at a variety of times (mornings, weeknights)</td>
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<tr>
<td>17. Policy that permits a balance of support for emerging and traditional arts forms</td>
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<tr>
<td>18. Exhibition/performance venues for emerging and experimental arts forms and artists</td>
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<td>19. Through underscoring of artists’ needs and organization’s ability to provide for them</td>
<td>1</td>
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<td>20. Improved access to artistic community by means of an open, healthy communication structure</td>
<td>1</td>
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<td>21. Visiting artists programs (residency programs, Artists in Residence, etc.)</td>
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<td>22. Travel opportunities for staff</td>
<td>1</td>
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<tr>
<td>23. Financial support (grants, scholarships, internships) offered for arts</td>
<td>1</td>
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</tbody>
</table>
Based on the scale above, please rate how important each of the following items is to the overall objectives of your organization; then circle the number that corresponds to your answer in the set of numbers (1 through 7) that appears directly to the right of each item.

<table>
<thead>
<tr>
<th>Item</th>
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<tr>
<td>A competitive process (proposals, review panel) for awarding financial support</td>
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<tr>
<td>Availability of facilities (workshops, artist residencies) that meet artists' needs</td>
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<tr>
<td>Support staff (technicians, librarians, administrative jobs) for artists' needs</td>
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<td>Community educational programs (children's programs, weekend workshops) for adults</td>
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<tr>
<td>Adequate time to present well-planned, organized educational programs</td>
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<tr>
<td>A variety of hours (time of day, time of year) that the programs are offered</td>
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<tr>
<td>Availability of visual and/or audio records of a very wide variety of things and events (archived)</td>
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<td>Video tapes of illustrated talks with artists (demonstrations)</td>
<td>1</td>
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<tr>
<td>Directors who show imagination and energy, clear, concerned leadership</td>
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<tr>
<td>Fundamental understanding of organizational strengths and weaknesses</td>
<td>1</td>
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<td>Skilled development officer</td>
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<td>Personal director who is sensitive to needs of those involved</td>
<td>1</td>
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<td>Effective use of staff (professional and volunteer)</td>
<td>1</td>
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<td>Frequent and consistent evaluations of staff</td>
<td>1</td>
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<td>Regular communication between all levels of the organization</td>
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<td>Collaboration among different departments</td>
<td>1</td>
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<tr>
<td>Collaboration of less experienced organizations with more experienced organizations (models)</td>
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<tr>
<td>Cooperation with arts agencies and other support organizations</td>
<td>1</td>
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<td>Voluntary accreditation</td>
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<td>Research projects on the efficiency and effectiveness of operations</td>
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<td>Community-based board of trustees</td>
<td>1</td>
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<td>Closely stated goals</td>
<td>1</td>
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<td>Engagement in both short and long range planning</td>
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<tr>
<td>Community input into organizational planning</td>
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<tr>
<td>Presentation of past works of art in relationship to present works</td>
<td>1</td>
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</table>
SCALE
1. Very Unimportant 5. Slightly Important
2. Moderately Unimportant 6. Moderately Important
3. Slightly Unimportant 7. Very Important
4. Neither Unimportant nor Important

Based on the scale above, please rate how important each of the following items is to the overall objectives of your organization; then circle the number that corresponds to your answer in the set of numbers 1 through 7 that appears directly to the right of each item.

50. A sense of where the arts are headed, a view of the future not just the present and past

51. Policy that aims at representation of the history of the arts

52. Activities and expertise to support inclusion of "models" that represent the diversity of the history of the arts

53. An avid interest in contemporary societies

54. A dedication to not only preserve past works of art but to collect contemporary works of art for future societies

55. Culturally diverse programming

56. Non-separatist approach to culturally diverse programming

57. Community input for programming development

58. Participation of diverse cultural areas on planning/programming committees

59. Artistic historians on staff or cooperation with an arts historian

60. Generals as well as specialists on staff

61. Adequate archival facilities

SECTIONS TWO

In this section, you are asked to respond to two types of questions. One type (Questions 65 - 70) requires that you circle the category that applies best to your organization for each statement. The statements relate to demographic and financial characteristics of your organization.

Here is an example:

The type of financial support that our organization receives the most of comes from the following category:

1. FEDERAL GOVERNMENT SUPPORT
2. CORPORATE SUPPORT
3. STATE GOVERNMENT SUPPORT
4. FOUNDATIONAL SUPPORT
5. LOCAL GOVERNMENT SUPPORT
6. INDIVIDUAL SUPPORT
7. ADMISSION FEE OR TICKET SALES
8. GIFT SHOP/SNACK BAR SALES
9. INCOME FROM ENDOWMENT FUNDS
10. OTHER INCOME
By circling the category "LOCAL GOVERNMENT SUPPORT," this individual indicates that the major portion of funding for their organization comes from local government support.

PLEASE CONTINUE NOW WITH QUESTIONS 65 - 69. Please circle the category that applies best to your organization.

65. Our organization can best be described by the following type of discipline:
1. ART MUSEUM
2. BALLET COMPANY
3. SYMPHONY/ORCHESTRA
4. OPERA COMPANY

66. The total operating budget of our organization in:
1. $1,499,999
2. $2,000,000 - 999,999
3. $1,000,000 - 1,499,999
4. $1,500,000 - 1,999,999
5. $2,000,000 - 2,499,999
6. $2,500,000 - 2,999,999
7. $3,000,000 - 3,499,999
8. $3,500,000 - 3,999,999
9. $4,000,000 - 4,499,999
10. $4,500,000 - 4,999,999
11. $5,000,000 and above

67. The age of our organization determined by the number of years since it was first established in:
1. 10 OR LESS
2. 11 - 15
3. 16 - 20
4. 21 - 25
5. 26 - 30
6. 31 - 35
7. 36 - 40
8. 41 - 45
9. 46 - 50
10. 51 - 55
11. 56 - 60
12. 61 - 65
13. 66 - 70
14. 71 - 75
15. 76 - 80
16. 81 - 85
17. 86 - 90
18. 91 OR MORE

68. The age of our oldest endowment fund determined by the number of years since it was first established in:
1. 10 OR LESS
2. 11 - 15
3. 16 - 20
4. 21 - 25
5. 26 - 30
6. 31 - 35
7. 36 - 40
8. 41 - 45
9. 46 - 50
10. 51 - 55
11. 56 - 60
12. 61 - 65
13. 66 - 70
14. 71 - 75
15. 76 - 80
16. 81 - 85
17. 86 - 90
18. 91 OR MORE

69. The value of our endowment funds, determined either by summing all the individual endowment funds or listing the total if the endowment funds have been pooled, is:
1. $1 - 5,999,999
2. $6,000,000 - 11,999,999
3. $12,000,000 - 17,999,999
4. $18,000,000 - 23,999,999
5. $24,000,000 - 29,999,999
6. $30,000,000 - 35,999,999
7. $36,000,000 - 41,999,999
8. $42,000,000 - 47,999,999
9. $48,000,000 - 53,999,999
10. $54,000,000 OR MORE

Questions 71 - 74 require that you provide an answer by filling in the blank space. PLEASE WRITE LEGIBLY. YOU MAY USE PENCIL OR PEN.

71. The title that best describes my position at this organization is:

72. The percentage of interest earned on our endowment funds that is used as operating income is:

73. The percentage of interest earned on our endowment funds that is reinvested is:

74. The percentage of interest earned on our endowment funds that is used to cover costs of administering the endowment is:

You have now completed the questionnaire. Thank you for your participation. If you have any comments that you would like to make about this questionnaire, please feel free to use the space provided on the back cover to do so.
February 11, 1992

Dear:  

I am writing to seek your advice on a section of my doctoral research study. I was wondering if you would look over my survey instrument and comment/critique it? I certainly would appreciate your comments.

Some questions that I would like you to consider as you examine the instrument are: Is the instrument vague? Is it too much, too little? Do you think the instrument will provide the answers that I am looking for?

I have enclosed a summary sheet that briefly explains my research project.

One note about the survey instrument: whereas the instrument you will be looking at was laser printed on office paper, the actual instrument to be mailed will be typeset and printed on a better-grade of paper.

If you would want to discuss my study further, or arrange to meet with me to discuss it, please call me at 294-9093. Otherwise, if you would kindly return your comments by the end of the month, Friday, February 28, 1992, your help will be very much appreciated. My campus address is 340 Hopkins Hall; 128 N. Oval Mall. Thank you.

Sincerely,

Donald Glenn  
Graduate Administrative Associate

enclosures
March 16, 1992

Dear:

I am writing to seek your advice on a segment of a research study to be conducted nationwide later this spring. I have enclosed a summary sheet that briefly explains the research project. I was wondering if you could examine the enclosed questionnaire and answer some questions about it? I certainly would appreciate your commentary.

Some questions that I would like you to consider as you examine the questionnaire follow -- please address as many as you care to:

In your opinion...
Are the instructions and questions clearly stated?
Does the instrument look like it is measuring what it claims to measure?
Will the respondents be motivated to answer the questionnaire?
Will the respondents be able to answer openly, without concern about discussing sensitive or damaging information?
Will the respondents give truthful answers or will the answers be less than truthful, socially acceptable?
How much time do you think it will take to complete the questionnaire?
Are executive directors the persons within arts organizations who can best answer this type of questionnaire?

One note about the questionnaire: whereas the one you will be looking at was laser printed on office paper, the actual questionnaire used in the study will be typeset on a better-grade of paper.

If you would want to discuss this study further, please call me at (614) 292-7183. Otherwise, if you would kindly return your comments by Tuesday, March 31, 1992 your help will be much appreciated. I have enclosed a stamped, self-addressed, return envelope for your convenience. You can return your responses anonymously if you chose. Your name will not appear in any report or publication unless of course you would prefer to be recognized for your efforts. Thank you once again for your help.

Sincerely,

Donald Glenn
Administrative Associate
Thank you for agreeing to participate in this study. There are two sections to this questionnaire. The first section asks you to evaluate a variety of items, the second section asks for some demographic information. Directions for each section are provided. Please read all directions carefully.

This questionnaire is being answered by executive directors of both visual and performing arts organizations. Each question is tailored to include both types of organizations. Some questions provide examples that relate to both types of organizations. Please read all questions carefully so that you can make the most accurate choice possible.

The time it will take to complete this questionnaire is estimated to be between fifteen to twenty minutes.

SECTION 1

In this section, there are forty-eight brief statements, numbered 1 through 48 for you to evaluate. Please work on one item at a time before going on to the next item. Consider the importance of each item to the overall objectives of your organization. You will then rate each item using a scale that ranges from "NONE AT ALL" to "EXTREMELY GREAT*. The scale that you will use is provided below. This same scale appears at the top of each page. Please take a moment now to carefully read the seven different choices on this scale that you will use to evaluate the importance of each item.

SCALE:
0 = NONE AT ALL
1 = VERY LITTLE
2 = LITTLE
3 = SOME
4 = GREAT
5 = VERY GREAT
6 = EXTREMELY GREAT

As an example, if you consider an item to have "VERY GREAT" importance to the overall objectives of your organization, you would rate this item with the corresponding number "5". After you have determined the importance of an item to the overall objectives of your organization -- based only on the seven choices in the scale above -- please record your rating in the set of numbers that appears directly to the right of each item. In this example, because you rated the item "VERY GREAT" you would circle the number "5" in the set of numbers that appears directly to the right of this item.

Here is how this example would look:

<table>
<thead>
<tr>
<th>NONE</th>
<th>EXTREMELY</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT ALL</td>
<td>GREAT</td>
</tr>
</tbody>
</table>

By circling the number "5", this individual indicates that the importance of this item is very great to the overall objectives of that organization.

PLEASE CIRCLE ONLY ONE ANSWER FOR EACH ITEM. PLEASE CIRCLE YOUR CHOICE CAREFULLY. DO NOT PLACE YOUR CIRCLE IN-BETWEEN THE NUMBERS OR MAKE STRAY MARKS.

YOU MAY USE PEN OR PENCIL.

PLEASE RATE EACH ITEM ONE AT A TIME. COMPLETELY CONSIDER EACH ITEM, CIRCLE YOUR SELECTION, THEN MOVE ON TO THE NEXT ITEM.

PLEASE BEGIN.
Based on the scale provided above, please rate the importance of each item to the overall objectives of your organization. Then, circle the number that corresponds to your answer in the set of numbers (0 - 6) that appears directly to the right of each item.

<table>
<thead>
<tr>
<th>Item</th>
<th>Scale: 3 = GREAT</th>
<th>Scale: 2 = LITTLE</th>
<th>Scale: 1 = VERY LITTLE</th>
<th>Scale: 0 = NONE AT ALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Some free days or occasional free programs for general audiences</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>2. Free admission or free ticket programs for targeted, specific audiences</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>3. Special discounts for targeted, specific groups (students, seniors)</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4. Advertising in broad range of media (not in media that only reaches traditional audiences)</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>5. Conveying the idea of a user-friendly environment through public service announcements, display advertising, and other communications</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>6. Demonstrating a user-friendly environment via in-house events, for example, festivals, pops concerts, educational workshops, on-site docent programs</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>7. Advisory groups from diverse audiences</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>8. Modest or free parking costs</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>9. Public transportation close-by</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>10. A regular educational program on television, such as public access on cable or public broadcast, featuring interviews, samples of programming, etc.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>11. Programming that addresses multicultural interests</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>12. Programming offered at a variety of times (matinees, weekends)</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>13. Exhibition/performance venues for emerging and experimental arts forms and artists</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>14. Thorough understanding of artists' needs and organization's ability to provide for them</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>15. Improved access to artistic community, by means of open, healthy communication structures</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>16. Visiting artists programs (residency programs, Artists-in-Residence, etc)</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>17. Travel opportunities for staff</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>18. Financial support (grants, scholarships, internships) offered for artists</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>19. A competitive process (proposals, review criteria) for awarding financial support</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>20. Availability of facilities (workshops, studios, research libraries) that meet artists' needs</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>21. Support staff (technicians, librarians, administrative support for artists)</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>22. Community educational programs (children's programs, weekend workshops for adults)</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>23. Adequate time to present well-planned, organized educational programs</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>24. A variety of times (time of day, time of year) that the educational programs are offered</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>
Based on the scale provided above, please rate the importance of each item to the overall objectives of your organization. Then, circle the number that corresponds to your answer in the set of numbers (0 - 6) that appears directly to the right of each item.

<table>
<thead>
<tr>
<th>Item</th>
<th>SCALE: 0 = NONE AT ALL</th>
<th>1 = VERY LITTLE</th>
<th>2 = LITTLE</th>
<th>3 = SOME</th>
<th>4 = GREAT</th>
<th>5 = VERY GREAT</th>
<th>6 = EXTREMELY GREAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>25. Fundamental understanding of organizational strengths and weaknesses</td>
<td>0 1 2 3 4 5 6</td>
<td></td>
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<tr>
<td>26. Effective use of staff (professional and volunteer)</td>
<td>0 1 2 3 4 5 6</td>
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<tr>
<td>27. Frequent and consistent performance evaluations of staff</td>
<td>0 1 2 3 4 5 6</td>
<td></td>
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<tr>
<td>28. Regular communication between all levels of the organization</td>
<td>0 1 2 3 4 5 6</td>
<td></td>
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<tr>
<td>29. Collaboration among different departments</td>
<td>0 1 2 3 4 5 6</td>
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<tr>
<td>30. Collaboration of less experienced organizations with more experienced organizations (models)</td>
<td>0 1 2 3 4 5 6</td>
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<tr>
<td>31. Cooperation with arts agencies and other support organizations</td>
<td>0 1 2 3 4 5 6</td>
<td></td>
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<tr>
<td>32. Research projects on the efficiency and effectiveness of operations</td>
<td>0 1 2 3 4 5 6</td>
<td></td>
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<tr>
<td>33. Community-based board of trustees</td>
<td>0 1 2 3 4 5 6</td>
<td></td>
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<tr>
<td>34. Clearly-stated goals</td>
<td>0 1 2 3 4 5 6</td>
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<tr>
<td>35. Engagement in both short- and long-range strategic planning</td>
<td>0 1 2 3 4 5 6</td>
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<tr>
<td>36. Community input into organizational planning</td>
<td>0 1 2 3 4 5 6</td>
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</tbody>
</table>
SECTION TWO

In this section, you are asked to respond to two types of questions. One type (Questions 49 - 55) requires that you circle the category that applies best to your organization for each statement. The statements relate to demographic and financial characteristics of your organization.

Here is an example:

The area of the United States in which our organization is located is best described as:

1. NORTHWEST
2. NORTH
3. NORTHEAST
4. EAST
5. SOUTHEAST
6. SOUTH
7. SOUTHWEST
8. WEST
9. CENTRAL

By circling the number "7", this individual indicates that the area of the country their organization is located in is the Southwest.

PLEASE CONTINUE NOW WITH QUESTIONS 49 - 55. PLEASE CIRCLE THE CATEGORY THAT BEST APPLIES TO YOUR ORGANIZATION.

49. Our organization can best be described by the following type of discipline:

1. ART MUSEUM
2. BALLET COMPANY
3. SYMPHONY ORCHESTRA
4. OPERA COMPANY

50. The population of the city in which we are located is:

1. 1 - 499,999
2. 500,000 - 999,999
3. 1,000,000 - 1,499,999
4. 1,500,000 - 1,999,999
5. 2,000,000 - 2,499,999
6. 2,500,000 - 2,999,999
7. 3,000,000 - 3,499,999
8. 3,500,000 - 3,999,999
9. 4,000,000 - 4,499,999
10. 4,500,000 - 4,999,999
11. 5,000,000 - 5,499,999
12. 5,500,000 - 5,999,999
13. 6,000,000 - 6,499,999
14. 6,500,000 - 6,999,999
15. 7,000,000 OR MORE

51. The total operating budget of our organization is:

1. $1 - 499,999
2. $500,000 - 999,999
3. $1,000,000 - 1,499,999
4. $1,500,000 - 1,999,999
5. $2,000,000 - 2,499,999
6. $2,500,000 - 2,999,999
7. $3,000,000 - 3,499,999
8. $3,500,000 - 3,999,999
9. $4,000,000 - 4,499,999
10. $4,500,000 - 4,999,999
11. $5,000,000 - 5,499,999
12. $5,500,000 - 5,999,999
13. $6,000,000 - 6,499,999
14. $6,500,000 - 6,999,999
15. $7,000,000 OR MORE

52. The type of financial support that our organization receives the most of comes from the following type of income:

1. FEDERAL GOVERNMENT SUPPORT
2. STATE GOVERNMENT SUPPORT
3. LOCAL GOVERNMENT SUPPORT
4. CORPORATE SUPPORT
5. FOUNDATION SUPPORT
6. INDIVIDUAL SUPPORT
7. ADMISSION FEE OR TICKET SALES
8. GIFT SHOP/CONCESSION SALES
9. INTEREST FROM ENDOWMENT FUNDS
10. OTHER INCOME
53. The age of our organization, determined by the number of years since it was first established, is:

1. 10 OR LESS
2. 11 - 20
3. 21 - 30
4. 31 - 40
5. 41 - 50
6. 51 - 60
7. 61 - 70
8. 71 - 80
9. 81 - 90
10. 91 OR MORE

54. The age of our oldest endowment fund, determined by the number of years since it was first established, is:

1. NOT APPLICABLE
2. 10 OR LESS
3. 11 - 20
4. 21 - 30
5. 31 - 40
6. 41 - 50
7. 51 - 60
8. 61 - 70
9. 71 - 80
10. 81 - 90
11. 91 OR MORE

55. The value of our endowment fund(s), determined either by summing all the individual endowment funds or listing the total if the endowment funds have been pooled, is:

1. NOT APPLICABLE
2. $1 - 1,999,999
3. $2,000,000 - 3,999,999
4. $4,000,000 - 5,999,999
5. $6,000,000 - 7,999,999
6. $8,000,000 - 9,999,999
7. $10,000,000 - 11,999,999
8. $12,000,000 - 13,999,999
9. $14,000,000 - 15,999,999
10. $16,000,000 - 17,999,999
11. $18,000,000 - 19,999,999
12. $20,000,000 - OR MORE

Questions 56 - 59 require that you provide an answer by filling in the blank space.

PLEASE WRITE LEGIBLY. YOU MAY USE PENCIL OR PEN.

56. The title that best describes my position at this organization is:

57. The percentage of interest earned on our endowment funds that is used as operating income is:

58. The percentage of interest earned on our endowment funds that is re-invested is:

59. The percentage of interest earned on our endowment funds that is used to cover administrative costs of the endowment(s) is:

YOU HAVE NOW COMPLETED THE QUESTIONNAIRE. THANK YOU FOR YOUR PARTICIPATION. IF YOU HAVE ANY COMMENTS THAT YOU WOULD LIKE TO MAKE, PLEASE FEEL FREE TO USE THE SPACE PROVIDED ON THE BACK COVER TO DO SO.

PLEASE RETURN THE COMPLETED QUESTIONNAIRE IN THE PRE-ADDRESSED RETURN ENVELOPE.
April 6, 1992

Dear :

You have been selected as part of a random sampling of arts organizations to participate in a national research project. The research is being conducted through The Ohio State University, Columbus. The study focuses on the relationship between funding patterns of arts organizations and the support of non-economic goals or values.

Prior research has suggested that funding sectors -- private patronage, corporate or foundation support, and government subsidy -- tend to support certain values. Examples of these values are: access, artistic opportunity, organizational development, and cultural preservation. This study examines the support of these values among arts organizations which may or may not have endowment funds. The goal is to determine what happens to the support of these values when endowment funds become a part of the funding picture.

Your participation in this study is vital for the following reasons: a) the research has the potential to influence the development of our nation's arts policy, which in the long run affects all of us -- you have the opportunity to contribute to the process; b) as a professional, your response provides an accurate account of what is truly occurring in the field; and c) the diversity of the many organizations in our arts community can be captured as part of the random sample, but only if you respond.

Your response will be completely confidential. At no time, will the name of any organization involved in this study be made available to any person. The collected data in this study will be combined and discussed as groups, such as "art museums". I am available to discuss any concerns you might have about the confidentiality of this study. Or, if you have any other questions about this study, I encourage you to call me at (614) 292-7183.

Thank you for your participation in this study. Please complete the questionnaire and return it in the enclosed stamped return envelope no later than Friday, April 17, 1992.

Sincerely,

J. Donald Glenn
Administrative Associate
# SPSS RESULTS
(for pilot test)

<table>
<thead>
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<th></th>
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<th>ARTISTIC OPPORTUNITY</th>
<th>ORGANIZATIONAL DEVELOPMENT</th>
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SPSS RESULTS
(for sample)

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**ALPHA IF ITEM DELETED**

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<td>.8243</td>
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<td>.9013</td>
</tr>
<tr>
<td>5</td>
<td>.8186</td>
<td>.8599</td>
<td>.9059</td>
</tr>
<tr>
<td>6</td>
<td>.8160</td>
<td>.8525</td>
<td>.9103</td>
</tr>
<tr>
<td>7</td>
<td>.8138</td>
<td>.8501</td>
<td>.9076</td>
</tr>
<tr>
<td>8</td>
<td>.8313</td>
<td>.8508</td>
<td>.9177</td>
</tr>
<tr>
<td>9</td>
<td>.8271</td>
<td>.8601</td>
<td>.9164</td>
</tr>
<tr>
<td>10</td>
<td>.8406</td>
<td>.8577</td>
<td>.9074</td>
</tr>
<tr>
<td>11</td>
<td>.8172</td>
<td>.8533</td>
<td>.9096</td>
</tr>
<tr>
<td>12</td>
<td>.8138</td>
<td>.8647</td>
<td>.9144</td>
</tr>
</tbody>
</table>
Thank you for agreeing to participate in this study. There are two sections to this questionnaire. The first section asks you to evaluate a variety of items, the second section asks for some demographic information. Directions for each section are provided. Please read all directions carefully.

This questionnaire is being answered by executive directors of both visual and performing arts organizations. Each question is tailored to include both types of organizations. Some questions provide examples that relate to both types of organizations. Please read all questions carefully so that you can make the most accurate choice possible.

The time it will take to complete this questionnaire is estimated to be between fifteen to twenty minutes.

SECTION 1

In this section, there are forty-eight brief statements, numbered 1 through 48 for you to evaluate. Please work on one item at a time before going on to the next item. Consider the importance of each item to the overall objectives of your organization. You will then rate each item using a scale that ranges from "NONE AT ALL" to "EXTREMELY GREAT". The scale that you will use is provided below. This same scale appears at the top of each page. Please take a moment now to carefully read the seven different choices on this scale that you will use to evaluate the importance of each item.

SCALE:

0 = NONE AT ALL
1 = VERY LITTLE
2 = LITTLE
3 = SOME
4 = GREAT
5 = VERY GREAT
6 = EXTREMELY GREAT

As an example, if you consider an item to have "VERY GREAT" importance to the overall objectives of your organization, you would rate this item with the corresponding number "5". After you have determined the importance of an item to the overall objectives of your organization -- based only on the seven choices in the scale above -- please record your rating in the set of numbers that appears directly to the right of each item. In this example, because you rated the item "VERY GREAT" you would circle the number "5" in the set of numbers that appears directly to the right of this item.

Here is how this example would look:

<table>
<thead>
<tr>
<th>NONE</th>
<th>EXTREMELY</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT ALL</td>
<td>GREAT</td>
</tr>
</tbody>
</table>

1. Discount admission fee or ticket price offered to senior citizens. 0 1 2 3 4 5 6

By circling the number "5", this individual indicates that the importance of this item is very great to the overall objectives of that organization.

PLEASE CIRCLE ONLY ONE ANSWER FOR EACH ITEM. PLEASE CIRCLE YOUR CHOICE CAREFULLY. DO NOT PLACE YOUR CIRCLE IN-BETWEEN THE NUMBERS OR MAKE STRAY MARKS.

YOU MAY USE PEN OR PENCIL.

PLEASE RATE EACH ITEM ONE AT A TIME. COMPLETELY CONSIDER EACH ITEM, CIRCLE YOUR SELECTION, THEN MOVE ON TO THE NEXT ITEM.

PLEASE BEGIN.
Based on the scale provided above, please rate the importance of each item to the overall objectives of your organization. Then, circle the number that corresponds to your answer in the set of numbers (0 - 6) that appears directly to the right of each item.

<table>
<thead>
<tr>
<th>Item</th>
<th>NONE</th>
<th>EXTREMELY GREAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Some free days or occasional free programs for general audiences</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>2. Free admission or free ticket programs for targeted, specific audiences</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>3. Special discounts for targeted, specific groups (students, seniors)</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>4. Advertisement in broad range of media (not in media that only reaches traditional audiences)</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>5. Conveying the idea of a user-friendly environment through public service announcements, display advertising, and other communications</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>6. Demonstrating a user-friendly environment via in-house events, for example, festivals, pop concerts, educational workshops, on-site docent programs</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>7. Advisory groups from diverse audiences</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>8. Modest or free parking costs</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>9. Public transportation close-by</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>10. A regular educational program on television, such as public access on cable or public broadcast, resuming interviews, samples of programming, etc.</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>11. Programming that addresses multicultural interests</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>12. Programming offered at a variety of times (matinees, weekends)</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>13. Exhibition/performance venues for emerging and experimental art forms and artists</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>14. Thorough understanding of artists' needs and organization's ability to provide for them</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>15. Improved access to artistic community, by means of open, healthy communication structures</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>16. Visiting artists programs (residency programs, Artists-in-Residence, etc)</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>17. Travel opportunities for staff</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>18. Financial support (grants, scholarships, internships) offered for artists</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>19. A competitive process (proposals, review criteria) for awarding financial support</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>20. Availability of facilities (workshops, studios, research libraries) that meet artists' needs</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>21. Support staff (technicians, librarians, administrators) for artists</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>22. Community educational programs (children's programs, weekend workshops for adults)</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>23. Adequate time to present well-planned, organized educational programs</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>24. A variety of times (time of day, time of year) that the educational programs are offered</td>
<td>0</td>
<td>1 2 3 4 5 6</td>
</tr>
</tbody>
</table>
Based on the scale provided above, please rate the importance of each item to the overall objectives of your organization. Then, circle the number that corresponds to your answer in the set of numbers (0 - 6) that appears directly to the right of each item.

<table>
<thead>
<tr>
<th>Item</th>
<th>Scale</th>
<th>NONE</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>EXTREMELY GREAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>25. Fundamental understanding of organizational strengths and weaknesses</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>26. Effective use of staff (professional and volunteer)</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>27. Frequent and consistent performance evaluations of staff</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>28. Regular communication between all levels of the organization</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>29. Collaboration among different departments</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>30. Collaboration of less experienced organizations with more experienced organizations (models)</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>31. Cooperation with arts agencies and other support organizations</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>32. Research projects on the efficiency and effectiveness of operations</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>33. Community-based board of trustees</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>34. Clearly-stated goals</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>35. Engagement in both short- and long-range strategic planning</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>36. Community input into organizational planning</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

Based on the scale provided above, please rate the importance of each item to the overall objectives of your organization. Then, circle the number that corresponds to your answer in the set of numbers (0 - 6) that appears directly to the right of each item.

<table>
<thead>
<tr>
<th>Item</th>
<th>Scale</th>
<th>NONE</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>EXTREMELY GREAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>37. Presentation of past works of art in relationship to present works</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>38. A dedication to not only preserve past works of art but to collect contemporary works of art for future societies</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>39. A sense of where the arts are headed, a view of the future not just the present and past</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>40. Community input for programming development</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>41. Participation of culturally diverse artists on planning or programming committees</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>42. Non-separatist approach to culturally diverse programming</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>43. Artist historian on staff or cooperation with an arts historian</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>44. Generalist as well as specialists on staff</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>45. Adequate archival facilities</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>46. Methods of documentation and presentation (film, video reproductions available)</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>47. An educating body of docents/educators</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>48. Willingness to allow the public to respond, react/ask questions that get real answers</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>
SECTION TWO

In this section, you are asked to respond to two types of questions. One type (Questions 49 - 55) requires that you circle the category that applies best to your organization for each statement. The statements relate to demographic and financial characteristics of your organization.

Here is an example:

The area of the United States in which our organization is located is best described as:

1. NORTHWEST
2. NORTH
3. NORTHEAST
4. EAST
5. SOUTHEAST
6. SOUTH
7. SOUTHWEST
8. WEST
9. CENTRAL

By circling the number "7", this individual indicates that the area of the country their organization is located in is the Southwest.

PLEASE CONTINUE NOW WITH QUESTIONS 49 - 55. PLEASE CIRCLE THE CATEGORY THAT BEST APPLIES TO YOUR ORGANIZATION.

49. Our organization can best be described by the following type of discipline:

1. ART MUSEUM
2. BALLET COMPANY
3. SYMPHONY ORCHESTRA
4. OPERA COMPANY

50. The population of the city in which we are located is:

1. 1 - 499,999
2. 500,000 - 999,999
3. 1,000,000 - 1,499,999
4. 1,500,000 - 1,999,999
5. 2,000,000 - 2,499,999
6. 2,500,000 - 2,999,999
7. 3,000,000 - 3,499,999
8. 3,500,000 - 3,999,999
9. 4,000,000 - 4,499,999
10. 4,500,000 - 4,999,999
11. 5,000,000 - 5,499,999
12. 5,500,000 - 5,999,999
13. 6,000,000 - 6,499,999
14. 6,500,000 - 6,999,999
15. 7,000,000 OR MORE

51. The total operating budget of our organization is:

1. $1 - 499,999
2. $500,000 - 999,999
3. $1,000,000 - 1,499,999
4. $1,500,000 - 1,999,999
5. $2,000,000 - 2,499,999
6. $2,500,000 - 2,999,999
7. $3,000,000 - 3,499,999
8. $3,500,000 - 3,999,999
9. $4,000,000 - 4,499,999
10. $4,500,000 - 4,999,999
11. $5,000,000 - 5,499,999
12. $5,500,000 - 5,999,999
13. $6,000,000 - 6,499,999
14. $6,500,000 - 6,999,999
15. $7,000,000 OR MORE

52. The type of financial support that our organization receives the most of comes from the following type of income:

1. FEDERAL GOVERNMENT SUPPORT
2. STATE GOVERNMENT SUPPORT
3. LOCAL GOVERNMENT SUPPORT
4. CORPORATE SUPPORT
5. FOUNDATION SUPPORT
6. INDIVIDUAL SUPPORT
7. ADMISSION FEE OR TICKET SALES
8. GIFT SHOP/CONCESSION SALES
9. INTEREST FROM ENDOWMENT FUNDS
10. OTHER INCOME
53. The age of our organization, determined by the number of years since it was first established, is:

1. 10 OR LESS
2. 11 - 20
3. 21 - 30
4. 31 - 40
5. 41 - 50
6. 51 - 60
7. 61 - 70
8. 71 - 80
9. 81 - 90
10. 91 OR MORE

54. The age of our oldest endowment fund, determined by the number of years since it was first established, is:

1. NOT APPLICABLE
2. 10 OR LESS
3. 11 - 20
4. 21 - 30
5. 31 - 40
6. 41 - 50
7. 51 - 60
8. 61 - 70
9. 71 - 80
10. 81 - 90
11. 91 OR MORE

55. The value of our endowment fund(s), determined either by summing all the individual endowment funds or listing the total if the endowment funds have been pooled, is:

1. NOT APPLICABLE
2. $1 - 1,999.999
3. $2,000,000 - 3,999,999
4. $4,000,000 - 5,999,999
5. $6,000,000 - 7,999,999
6. $8,000,000 - 9,999,999
7. $10,000,000 - 11,999,999
8. $12,000,000 - 13,999,999
9. $14,000,000 - 15,999,999
10. $16,000,000 - 17,999,999
11. $18,000,000 - 19,999,999
12. $20,000,000 - OR MORE

Questions 56 - 57 require that you provide answers by filling in the blank spaces.

PLEASE WRITE LEGIBLY. YOU MAY USE PENCIL OR PEN.

56. The title that best describes my position at this organization is:

57. Of the total amount earned on our endowment fund(s) in the past year, the percentage that was applied to each of the following:

OPERATING INCOME ______________%  
REINVESTMENT ______________%  
EXPENSE TO MANAGE THE FUND(S) ______________%  
OTHER ______________%  

(Amounts should total 100%)

An example to this question would be as follows: If $1,000 was earned in interest on an endowment fund, and $600 was used as operating income, $200 was reinvested, and $100 went toward the expense to manage the fund, the percentages listed would be 60%, 30%, and 10%.

YOU HAVE NOW COMPLETED THE QUESTIONNAIRE. THANK YOU FOR YOUR PARTICIPATION. IF YOU HAVE ANY COMMENTS THAT YOU WOULD LIKE TO MAKE, PLEASE FEEL FREE TO USE THE SPACE PROVIDED ON THE BACK COVER TO DO SO.

PLEASE RETURN THE COMPLETED QUESTIONNAIRE IN THE PRE-ADDRESSED RETURN ENVELOPE.
May 6, 1992

Dear:

You have been selected as part of a random sampling of arts organizations to participate in a national research project. The research is being conducted through The Ohio State University, Columbus. The study focuses on the relationship between funding patterns of arts organizations and the support of non-economic goals or values.

Prior research has suggested that funding sectors -- private patronage, corporate or foundation support, and government subsidy -- tend to support certain values. Examples of these values are: access, artistic opportunity, organizational development, and cultural preservation. This study examines the pursuit of these values among arts organizations which may or may not have endowments. The goal is to determine what happens to the support of these values when endowments enter the funding picture.

Your participation in this study is vital for the following reasons: a) the research has the potential to influence the development of our nation's arts policy, which in the long run affects all of us -- you have the opportunity to contribute to the process; b) as a professional, your response provides an accurate account of what is truly occurring in the field; and c) the diversity of the many organizations in our arts community can be captured as part of the random sample, but only if you respond.

Your response will be completely confidential. A code number appears on the questionnaire only as a way to keep track of responses. Each organization in the sample was assigned a number. A second questionnaire will be mailed to those who do not return a completed questionnaire by May 22, 1992. The code number will enable us to do this. At no time will the name of any organization involved in this study be made available to any person. The collected data in this study will be combined and discussed as groups, such as "art museums". I am available to discuss any concerns you might have about the confidentiality of this study. Or, if you have other questions about this study, I encourage you to call me at (614) 292-2298.

Thank you for your participation in this study. Please complete the questionnaire and return it in the enclosed stamped return envelope no later than Friday, May 22, 1992.

Sincerely,

Dr. James W. Hutchens
Associate Dean, College of the Arts
May 26, 1992

Dear :

Recently, you received a questionnaire as part of a nationwide research project being conducted through The Ohio State University. I am writing to invite you once again to participate in this important study. The accuracy of this study depends greatly on your completed and returned questionnaire.

If you have recently mailed a completed questionnaire, thank you for your participation. Our letters have crossed in the mail and there is no need for you to complete the enclosed duplicate questionnaire.

If you have not yet returned your questionnaire, please take a few moments at this time to complete it. The time it will take to complete it is approximately 10 to 15 minutes. For your convenience, I have enclosed another questionnaire and a stamped return envelope for you to use.

The study, as you might recall, focuses on the relationship between funding patterns of arts organizations and the support of non-economic goals or values. The study examines the pursuit of values such as access, artistic opportunity, organizational development, and cultural preservation among arts organizations which may or may not have endowments.

Your response will be completely confidential. A code number appears on the questionnaire only as a way to track responses. At no time will the name of any organization involved in this study be made available to any person. The collected data in this study will be combined and discussed as groups, such as "art museums." I am available to discuss any concerns you might have about the confidentiality of this study. Or, if you have other questions about this study, I encourage you to call me at (614) 292-2298.

As a professional in our nation's diverse spectrum of arts organizations, your response is truly meaningful. Your participation in this project is very much appreciated. Thank you for taking the time to complete the questionnaire and returning it in the enclosed stamped return envelope by Friday, June 5, 1992.

Sincerely,

James W. Hutchens
Associate Dean, College of the Arts
Contingency analysis #1.

Hypothesis 1: There is a relationship between the support level of access and the level of endowment funds.

H₀: Support level is independent of the level of endowment funds.  
Hₐ: Support level is not independent of the level of endowment funds.

alpha = 0.10  
d.f. = 2

<table>
<thead>
<tr>
<th>Level of endowment funds</th>
<th>01</th>
<th>02 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Level</td>
<td>Without</td>
<td>With</td>
</tr>
<tr>
<td>0-36</td>
<td>Fₒ= 8.0</td>
<td>Fₒ= 13.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ= 6.32</td>
<td>Fₑ= 14.69</td>
</tr>
<tr>
<td>37-48</td>
<td>Fₒ= 6.0</td>
<td>Fₒ= 15.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ= 6.32</td>
<td>Fₑ= 14.69</td>
</tr>
<tr>
<td>49-72</td>
<td>Fₒ= 8.0</td>
<td>Fₒ= 23.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ= 9.34</td>
<td>Fₑ= 21.65</td>
</tr>
</tbody>
</table>

Decision rule:  
If X² ≤ X²critical, accept H₀  
If X² > X²critical, reject H₀

Since X² = 1.55 < X²critical = 4.605, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Hypothesis 2: There is a relationship between the support level of artistic opportunity and the level of endowment funds.

H₀: Support level is independent of the level of endowment funds.
H₁: Support level is not independent of the level of endowment funds.

α = 0.10

\( df = 2 \)

Dependent Variable 2 - Artistic opportunity

<table>
<thead>
<tr>
<th>Support Level</th>
<th>01 Without</th>
<th>02 or more With</th>
<th>01 Without</th>
<th>02 or more With</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>Fo = 6.0</td>
<td>Fo = 15.0</td>
<td>Fe = 6.32</td>
<td>Fe = 14.69</td>
</tr>
<tr>
<td>37-48</td>
<td>Fo = 10.0</td>
<td>Fo = 21.0</td>
<td>Fe = 9.34</td>
<td>Fe = 21.65</td>
</tr>
<tr>
<td>49-72</td>
<td>Fo = 6.0</td>
<td>Fo = 15.0</td>
<td>Fe = 6.32</td>
<td>Fe = 14.67</td>
</tr>
</tbody>
</table>

\( X^2 = .11 < X^2_{critical} = 4.605 \), accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #3.

Hypothesis 3: There is a relationship between the support level of organizational development and the level of endowment funds.

H₀: Support level is independent of the level of endowment funds.
H₁: Support level is not independent of the level of endowment funds.

α = 0.10
d.f. = 2

Dependent Variable 3 - Organizational development

<table>
<thead>
<tr>
<th>Level of endowment funds</th>
<th>01</th>
<th>02 or more</th>
<th>02 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Level Without</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-48</td>
<td>Fo= 5.0</td>
<td>Fo= 12.0</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>Fe= 5.12</td>
<td>Fe= 11.87</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>48-60</td>
<td>Fo= 12.0</td>
<td>Fo= 24.0</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>Fe= 10.84</td>
<td>Fe= 25.15</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>61-72</td>
<td>Fo= 5.0</td>
<td>Fo= 15.0</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Fe= 6.02</td>
<td>Fe= 13.97</td>
<td></td>
</tr>
</tbody>
</table>

22 51 73 = N

Decision rule:

If $X^2 \leq X^2\text{critical}$, accept $H_0$
If $X^2 > X^2\text{critical}$, reject $H_0$

Since $X^2 = .42 < X^2\text{critical} = 4.605$, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #4.

Hypothesis 4: There is a relationship between the support level of cultural preservation and the level of endowment funds.

H₀: Support level is independent of the level of endowment funds.  
H₁: Support level is not independent of the level of endowment funds.

alpha = 0.10  
d.f. = 2

Dependent Variable 4 - Cultural preservation

<table>
<thead>
<tr>
<th>Support Level</th>
<th>01 Without</th>
<th>02 or more With</th>
</tr>
</thead>
</table>
| 0-36           | Fo= 10.0   | Fo= 13.0        | 23  
|                | Fe= 6.93   | Fe= 16.06       |  
| 37-48          | Fo= 5.0    | Fo= 22.0        | 27  
|                | Fe= 8.13   | Fe= 18.86       |  
| 49-72          | Fo= 7.0    | Fo= 16.0        | 23  
|                | Fe= 6.93   | Fe= 16.06       |  

22 51 73 = N

Decision rule:

If $X^2 \leq X^2_{critical}$, accept $H_0$  
If $X^2 > X^2_{critical}$, reject $H_0$

Since $X^2 = 3.66 < X^2_{critical} = 4.605$, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #5.

Hypothesis 5: There is a relationship between the support level of access and discipline.

H₀: Support level is independent of discipline.
Hₐ: Support level is not independent of discipline.

α = 0.10

D.F. = 2

Dependent Variable 1 - Access

<table>
<thead>
<tr>
<th>Support Level</th>
<th>1,2,4</th>
<th>Others</th>
<th>Symphony</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>6.0</td>
<td>15.0</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>10.93</td>
<td>10.07</td>
<td></td>
</tr>
<tr>
<td>37-48</td>
<td>9.0</td>
<td>12.0</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>10.93</td>
<td>10.07</td>
<td></td>
</tr>
<tr>
<td>49-72</td>
<td>23.0</td>
<td>8.0</td>
<td>31</td>
</tr>
<tr>
<td></td>
<td>16.13</td>
<td>14.86</td>
<td></td>
</tr>
</tbody>
</table>

38 35 73 = N

Decision rule:
If \( X^2 < X^2_{\text{critical}} \), accept H₀
If \( X^2 > X^2_{\text{critical}} \), reject H₀

Since \( X^2 = 11.44 \) > \( X^2_{\text{critical}} = 4.605 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #6.

Hypothesis 6: There is a relationship between the support level of artistic opportunity and discipline.

Hₐ: Support level is independent of discipline.
Hₜₐ: Support level is not independent of discipline.

alpha = 0.10

d.f. = 2

Dependent Variable 2 - Artistic opportunity

<table>
<thead>
<tr>
<th>Support Level</th>
<th>1,2,4</th>
<th>Others</th>
<th>Symphony</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>Fo= 6.0</td>
<td>Fo= 15.0</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Fe= 10.93</td>
<td>Fe= 10.07</td>
<td></td>
</tr>
<tr>
<td>37-48</td>
<td>Fo= 19.0</td>
<td>Fo= 12.0</td>
<td>31</td>
</tr>
<tr>
<td></td>
<td>Fe= 10.93</td>
<td>Fe= 10.07</td>
<td></td>
</tr>
<tr>
<td>49-72</td>
<td>Fo= 13.0</td>
<td>Fo= 8.0</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Fe= 10.93</td>
<td>Fe= 10.06</td>
<td></td>
</tr>
</tbody>
</table>

38 35 73 = N

Decision rule:
If $X^2 \leq X^2_{critical}$, accept $H_0$
If $X^2 > X^2_{critical}$, reject $H_0$

Since $X^2 = 6.51 > X^2_{critical} = 4.605$, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #7.

Hypothesis 7: There is a relationship between the support level of organizational development and discipline.

H₀: Support level is independent of discipline.
Hₐ: Support level is not independent of discipline.

α = 0.10
d.f. = 2

Dependent Variable 3 - Organizational development

<table>
<thead>
<tr>
<th>Support Level</th>
<th>1,2,4</th>
<th>Others</th>
<th>Symphony</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-48</td>
<td>Fo= 6.0</td>
<td>Fo= 12.0</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Fe= 9.36</td>
<td>Fe= 8.63</td>
<td></td>
</tr>
<tr>
<td>49-60</td>
<td>Fo= 23.0</td>
<td>Fo= 12.0</td>
<td>35</td>
</tr>
<tr>
<td></td>
<td>Fe= 18.22</td>
<td>Fe= 16.78</td>
<td></td>
</tr>
<tr>
<td>61-72</td>
<td>Fo= 9.0</td>
<td>Fo= 11.0</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Fe= 10.41</td>
<td>Fe= 9.58</td>
<td></td>
</tr>
<tr>
<td></td>
<td>38</td>
<td>35</td>
<td>73 = N</td>
</tr>
</tbody>
</table>

Decision rule:
If $X^2 \leq X^2_{critical}$, accept H₀
If $X^2 > X^2_{critical}$, reject H₀

Since $X^2 = 5.52 > X^2_{critical} = 4.605$, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #8.

Hypothesis 8: There is a relationship between the support level of cultural preservation and discipline.

H₀: Support level is independent of discipline.
H₁: Support level is not independent of discipline.

\[ \alpha = 0.10 \]
\[ d.f. = 2 \]

Dependent Variable 4 - Cultural preservation

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Support Level</th>
<th>1,2,4</th>
<th>Others</th>
<th>Symphony</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>Fo = 8.0</td>
<td>Fo = 15.0</td>
<td>Fe = 11.97</td>
<td>Fe = 11.03</td>
</tr>
<tr>
<td></td>
<td>23</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>37-48</td>
<td>Fo = 15.0</td>
<td>Fo = 11.0</td>
<td>Fe = 13.54</td>
<td>Fe = 12.47</td>
</tr>
<tr>
<td></td>
<td>26</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>49-72</td>
<td>Fo = 15.0</td>
<td>Fo = 9.0</td>
<td>Fe = 12.49</td>
<td>Fe = 11.50</td>
</tr>
<tr>
<td></td>
<td>24</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>38</td>
<td>35</td>
<td>73 = N</td>
<td></td>
</tr>
</tbody>
</table>

Decision rule:

If \( \chi^2 \leq \chi^2_{\text{critical}} \), accept \( H_0 \)
If \( \chi^2 > \chi^2_{\text{critical}} \), reject \( H_0 \)

Since \( \chi^2 = 4.12 < \chi^2_{\text{critical}} = 4.605 \), accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #9.

Hypothesis 9: There is a relationship between the level of endowment funds and discipline.

\( H_0 \): Support level is independent of discipline.
\( H_a \): Support level is not independent of discipline.

\( \alpha = 0.10 \)
\( d.f. = 2 \)

**Independent Variable - Level of endowment funds**

<table>
<thead>
<tr>
<th>Discipline</th>
<th>1,2,4 Others</th>
<th>3 Symphony</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>Fo</td>
<td>Fe</td>
</tr>
<tr>
<td>--------------</td>
<td>----</td>
<td>----</td>
</tr>
<tr>
<td>01</td>
<td>12.0</td>
<td>11.45</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>17.0</td>
<td>19.26</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>03 or more</td>
<td>9.0</td>
<td>7.29</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\( 38 \) \hspace{1cm} \( 35 \) \hspace{1cm} \( 73 = N \)

Decision rule:

If \( X^2 < X^2_{\text{critical}} \), accept \( H_0 \)
If \( X^2 > X^2_{\text{critical}} \), reject \( H_0 \)

Since \( X^2 = 1.46 < X^2_{\text{critical}} = 4.605 \), accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #10.

Hypothesis 10: There is a relationship between the support level of access and budget size.

H₀: Support level is independent of budget size.
H₁: Support level is not independent of budget size.

alpha = 0.10
d.f. = 2

Decision rule:
If $X^2 < X^2_{\text{critical}}$, accept $H₀$
If $X^2 > X^2_{\text{critical}}$, reject $H₀$

Since $X^2 = 14.57 > X^2_{\text{critical}} = 4.605$, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #11.

Hypothesis 11: There is a relationship between the support level of artistic opportunity and budget size.

\( H_0: \) Support level is independent of budget size.  
\( H_a: \) Support level is not independent of budget size.

\( \alpha = 0.10 \)  
\( d.f. = 2 \)

**Dependent Variable 2 - Artistic opportunity**

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Budget size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Fo=</th>
<th>Fe=</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>14.0</td>
<td>10.13</td>
</tr>
<tr>
<td></td>
<td>6.0</td>
<td>9.86</td>
</tr>
<tr>
<td>37-48</td>
<td>17.0</td>
<td>16.21</td>
</tr>
<tr>
<td></td>
<td>15.0</td>
<td>15.78</td>
</tr>
<tr>
<td>49-72</td>
<td>6.0</td>
<td>10.64</td>
</tr>
<tr>
<td></td>
<td>15.0</td>
<td>10.35</td>
</tr>
</tbody>
</table>

Decision rule:

If \( X^2 \leq X^2_{critical} \), accept \( H_0 \)  
If \( X^2 > X^2_{critical} \), reject \( H_0 \)

Since \( X^2 = 7.17 > X^2_{critical} = 4.605 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #12.

Hypothesis 12: There is a relationship between the support level of organizational development and budget size.

H₀: Support level is independent of budget size.
Hₐ: Support level is not independent of budget size.

α = 0.10
d.f. = 2

Decisive Variable 3 - Organizational development

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Budget size</th>
<th>1</th>
<th>2 - 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-48</td>
<td>Fo= 13.0</td>
<td>Fo= 5.0</td>
<td>18</td>
</tr>
<tr>
<td></td>
<td>Fe= 9.12</td>
<td>Fe= 8.87</td>
<td></td>
</tr>
<tr>
<td>48-60</td>
<td>Fo= 13.0</td>
<td>Fo= 21.0</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>Fe= 17.23</td>
<td>Fe= 16.76</td>
<td></td>
</tr>
<tr>
<td>60-72</td>
<td>Fo= 11.0</td>
<td>Fo= 10.0</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Fe= 10.64</td>
<td>Fe= 10.35</td>
<td></td>
</tr>
</tbody>
</table>

37 36 73 = N

Decision rule:
If X² ≤ X² critical, accept H₀
If X² > X² critical, reject H₀

Since X² = 5.46 > X² critical = 4.605, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #13.

Hypothesis 13: There is a relationship between the support level of cultural preservation and budget size.

\( H_0: \) Support level is independent of budget size.  
\( H_a: \) Support level is not independent of budget size.

\( \alpha = 0.10 \)  
\( \text{d.f.} = 2 \)

**Dependent Variable 4 - Cultural preservation**

<table>
<thead>
<tr>
<th>Budget size</th>
<th>Support Level</th>
<th>1</th>
<th>2 - 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>( F_o = 16.0 )</td>
<td>( F_o = 7.0 )</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>( F_e = 11.34 )</td>
<td>( F_e = 11.65 )</td>
<td></td>
</tr>
<tr>
<td>37-48</td>
<td>( F_o = 13.0 )</td>
<td>( F_o = 12.0 )</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>( F_e = 12.32 )</td>
<td>( F_e = 12.67 )</td>
<td></td>
</tr>
<tr>
<td>49-72</td>
<td>( F_o = 7.0 )</td>
<td>( F_o = 18.0 )</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>( F_e = 12.32 )</td>
<td>( F_e = 12.67 )</td>
<td></td>
</tr>
</tbody>
</table>

**Decision rule:**
- If \( X^2 \leq X^2_{\text{critical}} \), accept \( H_0 \)
- If \( X^2 > X^2_{\text{critical}} \), reject \( H_0 \)

Since \( X^2 = 8.39 > X^2_{\text{critical}} = 4.605 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Hypothesis 14: There is a relationship between the level of endowment funds and budget size.

H₀: Support level is independent of budget size.  
Hₐ: Support level is not independent of budget size.

alpha = 0.10  
d.f. = 2

Independent Variable - Level of endowment funds

<table>
<thead>
<tr>
<th>Level</th>
<th>Budget Size 1 (without)</th>
<th>2 or more (with)</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>F₀ = 11.0</td>
<td>F₀ = 26.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ = 11.15</td>
<td>Fₑ = 25.84</td>
</tr>
<tr>
<td>02</td>
<td>F₀ = 5.0</td>
<td>F₀ = 10.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ = 4.52</td>
<td>Fₑ = 10.48</td>
</tr>
<tr>
<td>03 or more</td>
<td>F₀ = 6.0</td>
<td>F₀ = 15.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ = 6.32</td>
<td>Fₑ = 14.67</td>
</tr>
<tr>
<td></td>
<td>22</td>
<td>51</td>
</tr>
</tbody>
</table>

Decision rule:
If X² ≤ X² critical, accept H₀  
If X² > X² critical, reject H₀

Since X² = .10 ≤ X² critical = 4.605, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #15.

Hypothesis 15: There is a relationship between the support level of access and the age of the organization.

H₀: Support level is independent of the age of the organization.
H₁: Support level is not independent of the age of the organization.

alpha = 0.10
d.f. = 2

Dependent Variable 1 - Access

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Age of Organization</th>
<th>1 - 3</th>
<th>4 - 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>Fₒ= 5.0</td>
<td>Fₒ= 18.0</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Fₑ= 9.13</td>
<td>Fₑ= 13.86</td>
<td></td>
</tr>
<tr>
<td>37-48</td>
<td>Fₒ= 11.0</td>
<td>Fₒ= 9.0</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Fₑ= 7.94</td>
<td>Fₑ= 12.05</td>
<td></td>
</tr>
<tr>
<td>49-72</td>
<td>Fₒ= 13.0</td>
<td>Fₒ= 17.0</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td>Fₑ= 11.91</td>
<td>Fₑ= 18.08</td>
<td></td>
</tr>
</tbody>
</table>

29 44 73 = N

Decision rule:
If X² ≤ X² critical, accept H₀
If X² > X² critical, reject H₀

Since X² = 5.18 > X² critical = 4.605, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #16.

Hypothesis 16: There is a relationship between the support level of artistic opportunity and the age of the organization.

H₀: Support level is independent of the age of the organization.
H₁: Support level is not independent of the age of the organization.

\[ \text{alpha} = 0.10 \]
\[ \text{d.f.} = 2 \]

Dependent Variable 2 - Artistic opportunity

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Age of Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 - 3</td>
</tr>
<tr>
<td>0-36</td>
<td>Fo= 5.0</td>
</tr>
<tr>
<td></td>
<td>Fe= 8.34</td>
</tr>
<tr>
<td>37-48</td>
<td>Fo= 12.0</td>
</tr>
<tr>
<td></td>
<td>Fe= 12.31</td>
</tr>
<tr>
<td>49-72</td>
<td>Fo= 12.0</td>
</tr>
<tr>
<td></td>
<td>Fe= 12.31</td>
</tr>
</tbody>
</table>

\[ \text{Fo} = 16.0 \quad \text{Fe} = 9.78 \]
\[ \text{Fo} = 19.0 \quad \text{Fe} = 14.43 \]
\[ \text{Fo} = 9.0 \quad \text{Fe} = 14.43 \]

\[ \text{Decision rule:} \]

If \( \chi^2 \leq \chi^2_{\text{critical}} \), accept \( H_0 \)
If \( \chi^2 > \chi^2_{\text{critical}} \), reject \( H_0 \)

Since \( \chi^2 = 8.77 > \chi^2_{\text{critical}} = 4.605 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #17.

Hypothesis 17: There is a relationship between the support level of organizational development and the age of the organization.

$H_0$: Support level is independent of the age of the organization.
$H_a$: Support level is not independent of the age of the organization.

$\alpha = 0.10$
$d.f. = 2$

Dependent Variable 3 - Organizational development

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Age of Organization</th>
<th>$F_o$</th>
<th>$F_e$</th>
<th>$\chi^2$</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 3</td>
<td>$F_o = 8.0$</td>
<td>$F_e = 10.94$</td>
<td>6.05</td>
<td></td>
</tr>
<tr>
<td>4 - 9</td>
<td>$F_o = 9.0$</td>
<td>$F_e = 6.05$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>48 - 60</td>
<td>$F_o = 25.0$</td>
<td>$F_e = 23.17$</td>
<td>11.82</td>
<td></td>
</tr>
<tr>
<td>61 - 72</td>
<td>$F_o = 14.0$</td>
<td>$F_e = 12.87$</td>
<td>7.12</td>
<td></td>
</tr>
</tbody>
</table>

47 26 73 = $N$

Decision rule:

If $\chi^2 \leq \chi^2_{critical}$, accept $H_0$
If $\chi^2 > \chi^2_{critical}$, reject $H_0$

Since $\chi^2 = 2.90 < \chi^2_{critical} = 4.605$, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #18.

Hypothesis 18: There is a relationship between the support level of cultural preservation and the age of the organization.

$H_0$: Support level is independent of the age of the organization.
$H_a$: Support level is not independent of the age of the organization.

$\alpha = 0.10$
$d.f. = 2$

**Dependent Variable 4 - Cultural preservation**

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Age of Organization</th>
<th>0-36</th>
<th>37-48</th>
<th>49-72</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fo=</td>
<td>Fe=</td>
<td>Fo=</td>
<td>Fe=</td>
</tr>
<tr>
<td>0-36</td>
<td>6.0</td>
<td>9.14</td>
<td>17.0</td>
<td>13.86</td>
</tr>
<tr>
<td>37-48</td>
<td>12.0</td>
<td>10.32</td>
<td>14.0</td>
<td>15.67</td>
</tr>
<tr>
<td>49-72</td>
<td>11.0</td>
<td>9.53</td>
<td>13.0</td>
<td>14.47</td>
</tr>
</tbody>
</table>

29 44 73 = N

Decision rule:
If $X^2 \leq X^2_{\text{critical}}$, accept $H_0$
If $X^2 > X^2_{\text{critical}}$, reject $H_0$

Since $X^2 = 2.62 < X^2_{\text{critical}} = 4.605$, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #19.

Hypothesis 19: There is a relationship between the level of endowment funds and the age of the organization.

H₀: Support level is independent of the age of the organization.
H₁: Support level is not independent of the age of the organization.

α = 0.10
d.f. = 2

Independent Variable - Level of endowment funds

<table>
<thead>
<tr>
<th>Level</th>
<th>1 (without)</th>
<th>2 or more (with)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>Fo=</td>
<td>Fe=</td>
</tr>
<tr>
<td>1-2</td>
<td>9.0</td>
<td>4.22</td>
</tr>
<tr>
<td>3</td>
<td>5.0</td>
<td>4.82</td>
</tr>
<tr>
<td>4-9</td>
<td>8.0</td>
<td>12.95</td>
</tr>
<tr>
<td></td>
<td>22</td>
<td>51</td>
</tr>
</tbody>
</table>

Decision rule:
If \( \chi^2 \leq \chi^2_{\text{critical}} \), accept \( H_0 \).
If \( \chi^2 > \chi^2_{\text{critical}} \), reject \( H_0 \).

Since \( \chi^2 = 10.47 > \chi^2_{\text{critical}} = 4.605 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #20.

Hypothesis 20: There is a relationship between the support level of access and the age of the endowment fund.

H₀: Support level is independent of the age of the endowment fund.
H₁: Support level is not independent of the age of the endowment fund.

\[ \alpha = 0.10 \]
\[ \text{d.f.} = 2 \]

<table>
<thead>
<tr>
<th>Dependent Variable 1 - Access</th>
<th>Age of Endowment Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Level</td>
<td>1 (without)</td>
</tr>
<tr>
<td>Fo</td>
<td>10.0</td>
</tr>
<tr>
<td>Fe</td>
<td>6.90</td>
</tr>
<tr>
<td>0-36</td>
<td></td>
</tr>
<tr>
<td>Fo</td>
<td>6.0</td>
</tr>
<tr>
<td>Fe</td>
<td>6.90</td>
</tr>
<tr>
<td>37-48</td>
<td></td>
</tr>
<tr>
<td>Fo</td>
<td>8.0</td>
</tr>
<tr>
<td>Fe</td>
<td>10.19</td>
</tr>
<tr>
<td>49-72</td>
<td></td>
</tr>
</tbody>
</table>

\[ 24 \quad 49 \quad 73 = N \]

Decision rule:
If \( X^2 \leq X^2_{\text{critical}} \), accept \( H_0 \)
If \( X^2 > X^2_{\text{critical}} \), reject \( H_0 \)

Since \( X^2 = 3.03 < X^2_{\text{critical}} = 4.605 \), accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #21.

Hypothesis 21: There is a relationship between the support level of artistic opportunity and the age of the endowment fund.

H₀: Support level is independent of the age of the endowment fund.
Hₐ: Support level is not independent of the age of the endowment fund.

\( \alpha = 0.10 \)
\( d.f. = 2 \)

**Dependent Variable 2 - Artistic opportunity**

<table>
<thead>
<tr>
<th>Age of Endowment Fund</th>
<th>Support 1 (without)</th>
<th>Support 2 (with)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-36</td>
<td>F₀ = 8.0</td>
<td>F₀ = 13.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ = 6.90</td>
<td>Fₑ = 14.09</td>
</tr>
<tr>
<td>37-48</td>
<td>F₀ = 10.0</td>
<td>F₀ = 21.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ = 10.19</td>
<td>Fₑ = 20.80</td>
</tr>
<tr>
<td>49-72</td>
<td>F₀ = 6.0</td>
<td>F₀ = 15.0</td>
</tr>
<tr>
<td></td>
<td>Fₑ = 6.90</td>
<td>Fₑ = 14.09</td>
</tr>
</tbody>
</table>

\( 24 \) \( 49 \) \( 73 = N \)

**Decision rule:**

If \( \chi^2 \leq \chi^2 \text{critical} \), accept \( H₀ \)
If \( \chi^2 > \chi^2 \text{critical} \), reject \( H₀ \)

Since \( \chi^2 = .42 < \chi^2 \text{critical} = 4.605 \), accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Hypothesis 22: There is a relationship between the support level of organizational development and the age of the endowment fund.

\( H_0: \) Support level is independent of the age of the endowment fund.
\( H_1: \) Support level is not independent of the age of the endowment fund.

\( \alpha = 0.10 \)
\( d.f. = 2 \)

Dependent Variable 3 - Organizational development

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Age of Endowment Fund</th>
<th>1 (without)</th>
<th>2 or more (with)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-48</td>
<td>Fo= 7.0</td>
<td>Fo= 10.0</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>Fe= 5.58</td>
<td>Fe= 11.41</td>
<td></td>
</tr>
<tr>
<td>48-60</td>
<td>Fo= 12.0</td>
<td>Fo= 24.0</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>Fe= 11.83</td>
<td>Fe= 24.16</td>
<td></td>
</tr>
<tr>
<td>61-72</td>
<td>Fo= 5.0</td>
<td>Fo= 15.0</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Fe= 6.57</td>
<td>Fe= 13.42</td>
<td></td>
</tr>
</tbody>
</table>

24 49 73 = N

Decision rule:
If \( X^2 < X^2_{\text{critical}} \), accept \( H_0 \)
If \( X^2 > X^2_{\text{critical}} \), reject \( H_0 \)

Since \( X^2 = 1.09 < X^2_{\text{critical}} = 4.605 \), accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #23.

Hypothesis 23: There is a relationship between the support level of cultural preservation and the age of the endowment fund.

$H_0$: Support level is independent of the age of the endowment fund.

$H_a$: Support level is not independent of the age of the endowment fund.

$\alpha = 0.10$

d.f. = 2

<table>
<thead>
<tr>
<th>Dependent Variable 4 - Cultural development</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Support Level</strong></td>
</tr>
<tr>
<td>(without)</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>0-36</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>37-48</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>49-72</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

24 49 73 = N

Decision rule:
If $X^2 \leq X^2_{critical}$, accept $H_0$
If $X^2 > X^2_{critical}$, reject $H_0$

Since $X^2 = 5.42 > X^2_{critical} = 4.605$, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #24.

Hypothesis 24: There is a relationship between the level of endowment funds and the age of the endowment fund.

$H_0$: Support level is independent of the age of the endowment fund.
$H_a$: Support level is not independent of the age of the endowment fund.

$\alpha = 0.10$

d.f. = 1

**Independent Variable - Level of endowment funds**

<table>
<thead>
<tr>
<th>Age</th>
<th>1-2</th>
<th>3 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-3</td>
<td>Fo= 55.0</td>
<td>Fe= 50.13</td>
</tr>
<tr>
<td>4 or more</td>
<td>Fo= 5.0</td>
<td>Fe= 9.86</td>
</tr>
</tbody>
</table>

$N = 73 = 60 + 13$

Decision rule:

If $X^2 < X^2_{\text{critical}}$, accept $H_0$

If $X^2 > X^2_{\text{critical}}$, reject $H_0$

Since $X^2 = 16.16 > X^2_{\text{critical}} = 2.706$, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Hypothesis 25: There is a relationship between the support level of access and the population size of the geographical location.

\( H_0 \): Support level is independent of the population size of the geographical location.
\( H_a \): Support level is not independent of the population size of the geographical location.

\[ \alpha = 0.10 \]
\[ d.f. = 1 \]

**Dependent Variable 1 - Access**

<table>
<thead>
<tr>
<th>Population Size</th>
<th>Support Level 1</th>
<th>Support Level 2 - 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>( 0-48 )</td>
<td>( F_o = 36.0 )</td>
<td>( F_o = 16.0 )</td>
</tr>
<tr>
<td></td>
<td>( F_e = 29.91 )</td>
<td>( F_e = 22.08 )</td>
</tr>
<tr>
<td>( 48-72 )</td>
<td>( F_o = 15.0 )</td>
<td>( F_o = 8.91 )</td>
</tr>
<tr>
<td></td>
<td>( F_e = 12.08 )</td>
<td></td>
</tr>
</tbody>
</table>

\[ 52 \quad 21 \quad 73 = N \]

**Decision rule:**
If \( X^2 \leq X^2_{critical} \), accept \( H_0 \)
If \( X^2 > X^2_{critical} \), reject \( H_0 \)

Since \( X^2 = 10.12 > X^2_{critical} = 2.706 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Contingency analysis #26.

Hypothesis 26: There is a relationship between the support level of artistic opportunity and the population size of the geographical location.

\( H_0 \): Support level is independent of the population size of the geographical location.

\( H_a \): Support level is not independent of the population size of the geographical location.

\( \alpha = 0.10 \)

\( d.f. = 2 \)

Dependent Variable 2 - Artistic opportunity

<table>
<thead>
<tr>
<th>Support Level</th>
<th>Population Size</th>
<th>( F_o )</th>
<th>( F_e )</th>
<th>( F_o )</th>
<th>( F_e )</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2 - 15</td>
<td>17.0</td>
<td>5.0</td>
<td>8.54</td>
<td>3.45</td>
</tr>
<tr>
<td>37 - 48</td>
<td>23.0</td>
<td>7.0</td>
<td>6.04</td>
<td>8.63</td>
<td></td>
</tr>
<tr>
<td>49 - 72</td>
<td>12.0</td>
<td>9.0</td>
<td>14.95</td>
<td>6.04</td>
<td></td>
</tr>
</tbody>
</table>

52 21 73 = N

Decision rule:

If \( X^2 < X^2_{critical} \), accept \( H_0 \)

If \( X^2 > X^2_{critical} \), reject \( H_0 \)

Since \( X^2 = 11.50 > X^2_{critical} = 4.605 \), reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Hypothesis 27: There is a relationship between the support level of organizational development and the population size of the geographical location.

H₀: Support level is independent of the population size of the geographical location.
H₁: Support level is not independent of the population size of the geographical location.

α = 0.10
d.f. = 1

<table>
<thead>
<tr>
<th>Dependent Variable 3 - Organizational development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population Size</td>
</tr>
<tr>
<td>Support Level</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>0-60</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>61-72</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

| 52       | 21     | 73 = N |

Decision rule:
If $X^2 < X^2_{critical}$, accept $H_0$
If $X^2 > X^2_{critical}$, reject $H_0$

Since $X^2 = 0.01 < X^2_{critical} = 2.706$, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Contingency analysis #28.

Hypothesis 28: There is a relationship between the support level of cultural preservation and the population size of the geographical location.

$H_0$: Support level is independent of the population size of the geographical location.
$H_a$: Support level is not independent of the population size of the geographical location.

$\alpha = 0.10$

d.f. = 2

| Dependent Variable 4 - Cultural preservation |
| Population Size |
| Support Level | 1 | 2 - 15 |
|----------------|
| 0-36 | Fo = 18.0 | Fo = 5.0 | 23 |
| Fe = 9.26 | Fe = 3.73 |
| 37-48 | Fo = 18.0 | Fo = 8.0 | 23 |
| Fe = 18.52 | Fe = 7.48 |
| 49-72 | Fo = 16.0 | Fo = 8.0 | 24 |
| Fe = 17.09 | Fe = 6.90 |

$52 \quad 21 \quad 73 = N$

Decision rule:
If $X^2 < X^2_{critical}$, accept $H_0$
If $X^2 > X^2_{critical}$, reject $H_0$

Since $X^2 = 8.98 > X^2_{critical} = 4.605$, reject the hypothesis of independence and conclude that a relationship exists between the two variables.
Hypothesis 29: There is a relationship between the level of endowment funds and the population size of the geographical location.

$H_0$: Support level is independent of the population size of the geographical location.

$H_a$: Support level is not independent of the population size of the geographical location.

$\alpha = 0.10$

d.f. = 1

**Independent Variable - Level of endowment funds**

<table>
<thead>
<tr>
<th>Level</th>
<th>1</th>
<th>2 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size (without)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Fo=15.0</td>
<td>Fo=37.0</td>
</tr>
<tr>
<td></td>
<td>Fe=15.67</td>
<td>Fe=36.32</td>
</tr>
<tr>
<td>2 or more</td>
<td>Fo=7.0</td>
<td>Fo=14.0</td>
</tr>
<tr>
<td></td>
<td>Fe=6.32</td>
<td>Fe=14.67</td>
</tr>
</tbody>
</table>

| 22 | 51 | 73 = N |

**Decision rule:**

If $X^2 < X^2_{critical}$, accept $H_0$

If $X^2 > X^2_{critical}$, reject $H_0$

Since $X^2 = .11 < X^2_{critical} = 2.706$, accept the hypothesis of independence and conclude that a relationship does not exist between the two variables.
Correlations Matrix

<table>
<thead>
<tr>
<th></th>
<th>(A)</th>
<th>(B)</th>
<th>(C)</th>
<th>(D)</th>
<th>(E)</th>
<th>(F)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ACCESS</td>
<td>ART/OPP</td>
<td>ORG/DEV</td>
<td>CUL/PRES</td>
<td>DISCIPLINE</td>
<td>POPULATION</td>
</tr>
<tr>
<td>A</td>
<td>1.00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>.65923</td>
<td>1.00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>.59866</td>
<td>.69748</td>
<td>1.00000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>.65863</td>
<td>.65812</td>
<td>.71901</td>
<td>1.00000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>-.35827</td>
<td>-.02745</td>
<td>-.09694</td>
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<tr>
<td>F</td>
<td>.25329</td>
<td>.25776</td>
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<td>.02345</td>
<td>.01883</td>
<td>1.00000</td>
</tr>
<tr>
<td>G</td>
<td>.36170</td>
<td>.22459</td>
<td>.13471</td>
<td>.19708</td>
<td>-.14718</td>
<td>.60625</td>
</tr>
<tr>
<td>H</td>
<td>-.19586</td>
<td>-.06058</td>
<td>-.04326</td>
<td>-.07509</td>
<td>.12892</td>
<td>-.00660</td>
</tr>
<tr>
<td>I</td>
<td>-.15913</td>
<td>-.20032</td>
<td>-.25543</td>
<td>-.17011</td>
<td>.00571</td>
<td>-.15319</td>
</tr>
<tr>
<td>J</td>
<td>.16114</td>
<td>.00392</td>
<td>.01234</td>
<td>.20928</td>
<td>-.37595</td>
<td>-.03502</td>
</tr>
<tr>
<td>K</td>
<td>.10779</td>
<td>.03888</td>
<td>.07008</td>
<td>.23859</td>
<td>-.34439</td>
<td>.03449</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>(G)</th>
<th>(H)</th>
<th>(I)</th>
<th>(J)</th>
<th>(K)</th>
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Correlations added to the Results Matrix.

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**KEY:**
- DV = Dependent variable
- V1 - V4 = Variables one through four
- SL = Support Level
- IV = Independent variable
- EFL = Endowment fund level
- EV1 - EV5 = Extraneous variables one through five