| | | | | | |
|---|---|---|---|---|---|
| III. Donor and donor-related parties represent more than ⅕, but not more than ½ of foundation's trustees, etc. who control investment policy: | | | | | |
| Blakely-Braniff Foundation | 100 percent of Girard Insurance Group common stock | [3] 12.0 | 0 | 0 | [3] 37.1 |
| Duke Endowment | 57 percent of Duke Power Co. common stock | [2] 366.6 | 11.1 | 3.0 | [2] 475.4 |
| | 82 percent of Duke Power Co. preferred stock | [2] .4 | .02 | 5.0 | ------ |
| | 22 percent of Piedmont & Northern Ry. Co. common stock | [2] 2.3 | .13 | 5.7 | ------ |
| Fred L. Emerson Foundation | 100 percent of Duncar Corp. common stock | [2] .9 | .02 | 2.2 | [2] 20.6 |
| | 100 percent of Enna Jettick Corp. capital stock | [2] .4 | 0 | 0 | ------ |
| Lettie Pate Evans Foundation | 42 percent of Whitehead Holding Co. common stock | [2] 7.5 | .58 | 7.7 | [2] 12.2 |
| Louis W. & Maud Hill Family Foundation | 100 percent of Hill Foundation Co. common stock | [2] 1.5 | 0 | 0 | [2] 59.4 |
| Samuel H. Kress Foundation | 42 percent of S. H. Kress & Co. common stock | [2] 18.0 | .25 | 1.4 | [2] 28.5 |
| Olin Foundation | 100 percent of Federal Cartridge Corp. common stock | [3] 14.3 | 1.02 | 7.1 | [2] 54.7 |
| IV. Donor and donor-related parties represent ⅕ or less of foundation's trustees, etc. who control investment policy: | | | | | |
| Altman Foundation | 95 percent of B. Altman & Co. capital stock | [3] 35.1 | .46 | 1.3 | [3] 39.6 |
| Callaway Foundation | 100 percent of Callaway Mills Co. common stock | [3] 37.7 | .00 | 0 | [2] 42.1 |
| Samuel S. Fels Fund | 86 percent of Fels & Co. common stock | [2] 2.9 | .02 | .7 | [2] 19.2 |
| Ford Foundation | Class A (nonvoting) stock of Ford Motor Co.; foundation's holding of class A stock represents 46 percent of the value of all shares of Ford Motor Co. stock. | [2] 2,095.2 | 91.15 | 4.4 | [2] 3,320.4 |
| Josephine E. Gordon Foundation | 100 percent of Gordon Baking Co. common stock | [3] 9.0 | .03 | .3 | [3] 9.0 |
| Gulf Oil Foundation | 100 percent of Pontiac Refining Co. common stock | [3] 32.2 | .75 | 2.3 | [3] 32.6 |
| Charles Hayden Foundation | 100 percent of Hayfund, Inc., capital stock | [3] .6 | .00 | 0 | [2] 76.2 |
| Independence Foundation | Preferred nonvoting stock in Band-It, Inc.; foundation's holding of preferred stock represents 79 percent of value of all shares of Band-It, Inc., stock. | [3] .8 | .05 | 6.3 | [2] 20.3 |
| W. K. Kellogg Foundation (and W. K. Kellogg Foundation Trust). | 45 percent of Kellogg Co. preferred stock | [2] 4.6 | .19 | 4.1 | [2] 380.3 |
| | 51 percent of Kellogg Co. common stock | [2] 334.6 | 7.2 | 2.2 | ------ |
| Pew Memorial Trust | 100 percent of Minerals Development Co. common stock | [3] 1.5 | .99 | 66.0 | [2] 141.5 |
| | 21 percent of Sun Oil Co. common stock | [2] 138.2 | 3.10 | 2.2 | ------ |
| Pittsburgh Plate Glass Foundation | 46 percent of Cavanaugh Co. common stock | [2] .4 | 0 | 0 | [2] 16.1 |
| Research Corp. | 100 percent of Research Cottrell, Inc. common stock | [3] 2.9 | 0 | 0 | [2] 11.4 |
| Alexander & Margaret Stewart Trust | 47 percent of Midland Building Industries, Inc., common stock. | [2] 1.2 | 0 | 0 | [3] 7.9 |
| | 50 percent of Midland Building Industries, Inc., preferred stock. | [3] .3 | .01 | 3.3 | ------ |
| Robert A. Welch Foundation | 70 percent of Mound Co. common stock | [3] 1.2 | .05 | 4.2 | [2] 55.8 |
| | 64 percent of the preferred stock of Mound Co.; foundation's holding of preferred stock represents 28 percent of value of all shares of Mound Co. stock. | [3] .8 | .04 | 5.0 | ------ |

[1] This table excludes stock of corporations which, it appears, hold assets, such as real estate, the income from which would not be treated as unrelated business income if the asset were owned directly by the foundation. It also excludes stock of corporations where the value of the stock in excess of 20 percent of the corporation's outstanding stock is less than $100,000.

[2] Market value.

[3] Value on foundation's books (value of assets at date of acquisition by foundation).

Source: 1964 Treasury Department Survey of Private Foundations. Similar information may be found in the Patman Report, 1st installment, supra, See pp. 35–50.