



Smithsonian

Institution Archives

Trust Fund Files, 1967-1979

Finding aid prepared by Smithsonian Institution Archives

Smithsonian Institution Archives
Washington, D.C.
Contact us at osiaref@si.edu

Table of Contents

| | |
|----------------------------------|---|
| Collection Overview | 1 |
| Administrative Information | 1 |
| Descriptive Entry..... | 1 |
| Names and Subjects | 1 |
| Container Listing | 2 |

Collection Overview

| | |
|--------------------|--|
| Repository: | Smithsonian Institution Archives, Washington, D.C., osiaref@si.edu |
| Title: | Trust Fund Files |
| Date: | 1967-1979 |
| Identifier: | Accession 82-108 |
| Creator:: | Smithsonian Institution. Office of Programming and Budget |
| Extent: | 8 cu. ft. (8 record storage boxes) |
| Language: | English |

Administrative Information

Preferred Citation

Smithsonian Institution Archives, Accession 82-108, Smithsonian Institution. Office of Programming and Budget, Trust Fund Files

Descriptive Entry

These records concern trust fund budgets and endowments, and include cash forecast worksheets, budget work papers, gift reports, and other materials.

Names and Subject Terms

This collection is indexed in the online catalog of the Smithsonian Institution under the following terms:

Subjects:

- Budget
- Budget process
- Legislative hearings -- United States
- Museum finance
- Museums -- Administration

Types of Materials:

- Books
- Brochures
- Manuscripts

Container Listing

| Box 1 | |
|------------|---|
| Box 1 of 8 | Special Events Office |
| Box 1 of 8 | Special Assistant to Secretary |
| Box 1 of 8 | Special Events |
| Box 1 of 8 | Office of the Secretary |
| Box 1 of 8 | Smithsonian Tropical Research Institute |
| Box 1 of 8 | Supply Services |
| Box 1 of 8 | Telecommunications Center |
| Box 1 of 8 | Travel Services |
| Box 1 of 8 | Treasurer |
| Box 1 of 8 | Other Miscellaneous Income |
| Box 1 of 8 | Overhead Recovery |
| Box 1 of 8 | Performing Arts (2 folders) |
| Box 1 of 8 | Photo Sales |
| Box 1 of 8 | Product Development |
| Box 1 of 8 | Programming Budget |
| Box 1 of 8 | Public Affairs |
| Box 1 of 8 | Publication Task Force |
| Box 1 of 8 | Personnel |
| Box 1 of 8 | Reception Center |
| Box 1 of 8 | Registrar |
| Box 1 of 8 | Resident Associates |
| Box 1 of 8 | Revolving Funds |

| | |
|------------|----------------------------------|
| Box 1 of 8 | Smithsonian Traveling Exhibits |
| Box 1 of 8 | Smithsonian Institution Press |
| Box 1 of 8 | Smithsonian Institution Computer |
| Box 1 of 8 | Smithsonian Institution Magazine |
| Box 1 of 8 | [Unlabeled folder] |
| Box 1 of 8 | Gift Reports |
| Box 1 of 8 | [Unlabeled folder] |
| Box 1 of 8 | Recent Reports |
| Box 1 of 8 | Tax Exemption File |
| Box 1 of 8 | TIAA - Taxes, etc. |
| Box 1 of 8 | Restricted Budgets |
| Box 1 of 8 | Archives of American Art |
| Box 1 of 8 | Balance Sheets |
| Box 1 of 8 | Cooper-Hewitt |
| Box 1 of 8 | Cash Flow |
| Box 1 of 8 | Credit Union |
| Box 1 of 8 | [Unlabeled folder] |
| Box 1 of 8 | Freer Budget |

Box 2

| | |
|------------|---|
| | True Endowments Summary: True Endowments |
| Box 2 of 8 | 2052 Archives of American Art |
| Box 2 of 8 | 2002 Arthur, James |
| Box 2 of 8 | 2004 Baird, Spencer F. |
| Box 2 of 8 | 2005 Barney, Alice Pike |

| | |
|------------|------------------------------------|
| Box 2 of 8 | Catherine Beaugard Memorial |
| Box 2 of 8 | 2044 Brown, Roland W. |
| Box 2 of 8 | 2007 Canfield Collection |
| Box 2 of 8 | 2009 Chamberlain, Francis L. |
| Box 2 of 8 | 2062 Special Paleontological |
| Box 2 of 8 | 2049 Division of Mammals |
| Box 2 of 8 | 2063 Division of Reptiles |
| Box 2 of 8 | 2061 Drake, Carl F. |
| Box 2 of 8 | 2012 Eickemeyer, Flo B. |
| Box 2 of 8 | 2045Guggenheim, Daniel |
| Box 2 of 8 | Henderson Meteorite Fund |
| Box 2 of 8 | 2065 Hewitt, E.G. |
| Box 2 of 8 | 2064 Hewitt, S. C. |
| Box 2 of 8 | 2014 Hitchcock Library |
| Box 2 of 8 | 2015 Hodgkins |
| Box 2 of 8 | 2016 Hrdlicka Research Endowment |
| Box 2 of 8 | 2017 Hughes, Bruce |
| Box 2 of 8 | Kramar, Nada |
| Box 2 of 8 | 2060 Lindsey, Jessie H. |
| Box 2 of 8 | 2018 Long, Annette |
| Box 2 of 8 | 20191 Maxwell, Mary Anthropology |
| Box 2 of 8 | 20192 Maxwell Mary E. Cult History |
| Box 2 of 8 | Mineral Fund |
| Box 2 of 8 | Mitchell, William A. |

| | |
|------------|---|
| Box 2 of 8 | 2035 Nelson, Edward H. 2067 |
| Box 2 of 8 | Oothout Memorial |
| Box 2 of 8 | 2071 Seward Johnson Oceanography |
| Box 2 of 8 | 2040 Petrocelli, Joseph |
| Box 2 of 8 | 2026 Roebling Collection |
| Box 2 of 8 | 2027 Rollins, Mariam |
| Box 2 of 8 | Bertha Rulf Estate |
| Box 2 of 8 | 2048 Sprague Bequest |
| Box 2 of 8 | 2029 Springer, Frank |
| Box 2 of 8 | 2030 Walcott Research Original |
| Box 2 of 8 | 2031 Walcott, Mary Vaux Estate |
| Box 2 of 8 | 2032 Walcott Endowment Botanical Publications |
| Box 2 of 8 | 2033 Zerbee Endowment |
| | Quasi Endowments Summary: Quasi Endowments |
| Box 2 of 8 | 2001 Abbott, W. L. |
| Box 2 of 8 | 2041 Armstrong, Edwin, J. |
| Box 2 of 8 | 2070 Batchelor, Emma E. |
| Box 2 of 8 | 2003 Bacon, Virginia |
| Box 2 of 8 | 2006 Barstow, Fred D. |
| Box 2 of 8 | 2069 Becker, George |
| Box 2 of 8 | 2008 Casey, Thomas Lincoln |
| Box 2 of 8 | Paul E. Desautels Fund |
| Box 2 of 8 | 2011 Dykes, Charles |
| Box 2 of 8 | 2068 Fleuri, Au Ponier |

| | |
|------------|---|
| Box 2 of 8 | 2038 M.G. and C. B. Hanson |
| Box 2 of 8 | 2013 Hillyer, Virgil |
| Box 2 of 8 | 2043 Johnson, E.R.F. |
| Box 2 of 8 | 2072 Kellogg, Remington |
| Box 2 of 8 | Lindbergh, Charles |
| Box 2 of 8 | 2036 Loeb, Morris |
| Box 2 of 8 | 2053 Lyons, Marcus Ward |
| Box 2 of 8 | Myers, Catherine |
| Box 2 of 8 | Noyes |
| Box 2 of 8 | Noyes, Pauline |
| Box 2 of 8 | Pell, Alfred Duane |
| Box 2 of 8 | Ramsey, Admiral |
| Box 2 of 8 | Rathbun, Richard |
| Box 2 of 8 | Reid, Addison T. |
| Box 2 of 8 | Roebing Solar Research |
| Box 2 of 8 | Secretary's Retirement |
| Box 2 of 8 | Strong, Julia D. |
| Box 2 of 8 | 2046 Tropical Fish Hobbies Schultz Fund |
| Box 2 of 8 | Smithsonian Institution (SI) Archives |
| Box 2 of 8 | Office of Academic Studies |
| Box 2 of 8 | Assistant Secretary for History and Art |
| Box 2 of 8 | Admin Smithsonian Astrophysical Observatory (SAO) Total |
| Box 2 of 8 | Anacostia Museum |
| Box 2 of 8 | Office of Audits |

| | |
|------------|---|
| Box 2 of 8 | Belmont House |
| Box 2 of 8 | Business Management |
| Box 2 of 8 | 1979 Budget Information file |
| Box 2 of 8 | Barney House |
| Box 2 of 8 | Chesapeake Bay Center |
| Box 2 of 8 | Communication and Transportation OPlantS (Office of Plant Services) |
| Box 2 of 8 | Contracts |
| Box 2 of 8 | Commissions |
| Box 2 of 8 | Contingency 1976 |
| Box 2 of 8 | Dentzel Carousel |
| Box 2 of 8 | Discretionary Funds |
| Box 2 of 8 | Division of Seminars |
| Box 2 of 8 | Facilities Planning and Engineering Services |
| Box 2 of 8 | Folklife Unit |
| Box 2 of 8 | Foreign Study Tours |
| Box 2 of 8 | Fort Pierce |
| Box 2 of 8 | General Counsel |
| Box 2 of 8 | Gifts |
| Box 2 of 8 | Grants and Insurance |
| Box 2 of 8 | Information Systems Division |
| Box 2 of 8 | Investment Division |
| Box 2 of 8 | Investment Income |
| Box 2 of 8 | Library |
| Box 2 of 8 | Management Analysis Office |

Box 2 of 8 Membership and Development

Box 2 of 8 Museum Shops

Box 2 of 8 Miscellaneous

Box 2 of 8 Museum of African Art

Box 2 of 8 National Associates

Box 2 of 8 National Geological Park

Box 2 of 8 Other Allotments

Box 2 of 8 OPlantS

Box 2 of 8 [Unlabeled folder - "S"]

Box 2 of 8 Cash Forecast Work Papers

Box 3

Box 3 of 8 Trust Fund Financial Results FY 1980 (2 folders)

Box 3 of 8 FY 1977 Private Unrestricted Budget OJB (2 folders)

Box 3 of 8 Financial Reports FY 1976 (2 folders)

Box 3 of 8 Restricted Funds Master Copy (2 folders)

Box 3 of 8 Restricted Budget 1968 (2 folders)

Box 3 of 8 Unrestricted Budget FY 1969 (3 folders)

Box 3 of 8 SI Magazine 1970

Box 3 of 8 Combined Federal/Private FY 1971 (2 folders)

Box 3 of 8 FY 1977 Private Unrestricted Budget JFJ (2 folders)

Box 3 of 8 FY 1976 Private Unrestricted Budget OJ Boyd (2 folders)

Box 3 of 8 Unrestricted Private Funds, Transition Quarter Budget 7/1/1976 - 9/30/76
(2 folders)

Box 4

Box 4 of 8 Restricted Funds 1976 (3 folders)

| | |
|------------|---|
| Box 4 of 8 | Full Year Reports for Archives of American Art, Cooper-Hewitt, Freer, Fort Pierce, Hillwood, Ramsey, and Reading is Fundamental (RIF) |
| Box 4 of 8 | Private Unrestricted Funds FY 1975 (2 folders) |
| Box 4 of 8 | SI Contracts, Cash Forecast 1971 |
| Box 4 of 8 | Private Budget FY 1972 (2 folders) |
| Box 4 of 8 | Restricted Funds 1973 (2 folders) |
| Box 4 of 8 | Private Funds 1973 (2 folders) |
| Box 4 of 8 | Private Unrestricted Funds Budget FY 1974 (2 folders) |
| Box 4 of 8 | Federal/Trust Resources Report to Congress, 1977 (2 folders) |
| Box 4 of 8 | Chesapeake Bay Center for Environmental Studies (CBCES) |
| | Box 5 |
| Box 5 of 8 | Friends of the National Zoo (FONZ) (2 folders) |
| Box 5 of 8 | Hillwood Museum (2 folders) |
| Box 5 of 8 | Course on Smithsonian Investments and Cash Management |
| Box 5 of 8 | Magazine Distribution |
| Box 5 of 8 | Program Report |
| Box 5 of 8 | Museum of American Art |
| Box 5 of 8 | Regents Meeting, May 1976 |
| Box 5 of 8 | Restricted Private Funds |
| Box 5 of 8 | SI Press |
| Box 5 of 8 | Unrestricted Financial Reports |
| Box 5 of 8 | Year End Work Papers FY 1978 |
| Box 5 of 8 | SI Operating Funds FY 1925 - FY 1976 (2 folders) |
| Box 5 of 8 | Trust Funds FY 1970 - 1971 |
| Box 5 of 8 | SAO Restricted Funds FY 1975 |

Box 5 of 8 Grants and Contracts FY 1970 - 1975

Box 5 of 8 Trust Fund Budgets FY 1977

Box 6

Box 6 of 8 Unrestricted Private Funds Budget FY 1976

Box 6 of 8 Transition Quarter (TQ) Trust Funds Budgets

Box 6 of 8 TQ Special Events Budgets

Box 6 of 8 TQ Revenue Producing Budgets

Box 6 of 8 TQ Administrative Budgets

Box 6 of 8 Special Purpose Funds FY 1978 (3 folders)

Box 6 of 8 Administrative FY 1978

Box 6 of 8 Trust Fund Budgets FY 1978

Box 6 of 8 Restricted FY 1978

Box 6 of 8 Unrestricted Units Comments FY 1978

Box 6 of 8 Restricted Endowments FY 1978

Box 6 of 8 Special Events FY 1978

Box 6 of 8 Trust Funds Budgets Miscellaneous & Recaps FY 1978

Box 6 of 8 Staff & Business FY 1978

Box 6 of 8 Special Purpose FY 1978

Box 6 of 8 Other Allotments Units Responses FY 1978

Box 6 of 8 Unrestricted Trust Fund Call FY 1978

Box 6 of 8 Other Allotments Trust Fund Budget FY 1978

Box 6 of 8 Special Purpose Recaps

Box 6 of 8 Auxiliary Activities FY 1978

Box 6 of 8 Trust Funds FY 1978

Box 7

| | |
|------------|---|
| Box 7 of 8 | Unrestricted Budgets FY 1979 (3 folders) |
| Box 7 of 8 | Trust Fund Budget Call FY 1979 (3 folders) |
| Box 7 of 8 | Budget Call Forms FY 1979 |
| Box 7 of 8 | General Fund Allotments_- FY 1979 Work Papers (2 folders) |
| Box 7 of 8 | Wilson Quarterly - FY 1979 Work Papers |
| Box 7 of 8 | Freer Gallery - FY 1979 |
| Box 7 of 8 | Archives of American Art - FY 1979 Work Papers |
| Box 7 of 8 | Federal Grants and Contracts - FY 1979 Work Papers |
| Box 7 of 8 | Restricted Endowments - FY 1979 Work Papers |
| Box 7 of 8 | Budget Computer Programs - FY 1979 Work Papers |
| Box 7 of 8 | Discretionary Allowances - FY 1979 Work Papers |
| Box 7 of 8 | Source & Application - FY 1979 Work Papers |
| Box 7 of 8 | Gifts & Foundation Grants - FY 1979 Work Papers |
| Box 7 of 8 | Special Purpose Funds - FY 1979 Work Papers |

Box 8

| | |
|------------|---|
| Box 8 of 8 | Trust Fund Budget FY 1979 |
| Box 8 of 8 | Trust Fund Budget Projection FY 1979 |
| Box 8 of 8 | Trust Fund Information Submitted to OMB (Office of Management and Budget) |
| Box 8 of 8 | Trust Fund Information Submitted to the Regents |
| Box 8 of 8 | Budget Revisions FY 1979 |
| Box 8 of 8 | Trust Fund Budget Presentation Materials FY 1979 |
| Box 8 of 8 | Special Events Allotments FY 1979 |
| Box 8 of 8 | Budgets Memos/Letters re: FY 1979 Budget |

| | |
|------------|---|
| Box 8 of 8 | Budget Call Instructions FY 1979 |
| Box 8 of 8 | Auxiliary Activities FY 1979 Work Papers |
| Box 8 of 8 | Administrative Allotments - FY 1979 Work Papers |
| Box 8 of 8 | Business Management - FY 1979 Work Papers |
| Box 8 of 8 | Overhead Projections - FY 1979 Work Papers |