



CHAUTAQUA FOUNDATION

2020 ANNUAL REPORT



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CHAUTAUQUA FOUNDATION

MISSION STATEMENT

Adopted by the Chautauqua Foundation Board of Directors, June 21, 2019.

The Chautauqua Foundation, Inc. exists to support the Chautauqua Institution through the preservation, the appropriate use, and the growth of endowment funds.

STATEMENT OF PURPOSE

Article II, Corporate Charter May 14, 1937

Chautauqua Foundation, Inc., was formed in May 1937 for the following stated purposes:

I To assist the Chautauqua Institution, Chautauqua, New York, in carrying out and extending its educational, religious and other purposes.

II To solicit, receive, and to acquire by gift, purchase, devise, bequest, or in other lawful ways, real and personal property.

III To hold such property and to invest and reinvest the same and receive the income thereof and to pay said income, less proper expenses, at least annually to the Chautauqua Institution, Chautauqua, New York, for the furtherance of its corporate purposes; except that, if this corporation acquires property for particular purposes or subject to specific conditions, neither said property nor the income therefrom shall be paid or transferred to the Chautauqua Institution, unless said Institution fulfills such purposes and conditions.

If Chautauqua Foundation, Inc., receives property, by gift, devise or bequest, subject to conditions or for specific purposes, which conditions and purposes the Chautauqua Institution fails, refuses or has not the corporate power to observe or carry out, such property shall be disposed of as directed by any court having jurisdiction.

IV Upon such terms as it approves, to dispose of any of its property which it deems unwise to hold.

V In case the Chautauqua Institution ceases to exist or to function in accordance with its corporate purposes, to pay over its income and hold or dispose of its property for the benefit of some similar religious or educational institution, as may be directed by any court having jurisdiction.

VI To do all lawful things proper or needful to accomplish the purposes herein before expressed.

CHAUTAUQUA FOUNDATION



MESSAGE FROM LEADERSHIP

At the time of last year's message, roughly five months into the pandemic, the resilience of Chautauqua was clearly on display. The value of the endowment had rebounded strongly from its initial COVID-related plunge. The Institution developed and launched the online CHQ Assembly platforms with astonishing speed, maintaining connection with our community and faithfulness to our mission. Even with no in-person programming, many Chautauquans returned to the grounds and were grateful to experience the Institution, and the lovely county in which it resides, in different but no less fulfilling ways. As the season drew to a close, the planning for the 2021 season began, with renewed energy around our strategic plan and excitement about the possibilities created by CHQ Assembly, yet tempered by the ongoing financial and programmatic uncertainty created by the pandemic.

As the Institution began carefully developing multiple budget scenarios and contingency plans for 2021, the Foundation remained closely involved, ready and eager to provide support. We worked together to explore a variety of ways in which the Foundation could assist the Institution, helping to bridge cash-flow timing issues, and coordinating with the Institution's leaders to identify ways to maximize the use of available endowment payout funds in a manner consistent with donor wishes and prudent fiduciary management. This work continues as we look toward 2022, and it has further strengthened the ties between the Institution and Foundation at both the staff and board levels.

Within the Foundation, we have pushed forward with initiatives designed to better meet the needs and expectations of our donors. For example, the unusual nature of programming in 2020 led us to perform additional steps to ensure that our payout of restricted funds was consistent with donor intentions. This included a comprehensive re-review of all our donor agreements, resulting in an easy-to-use database of relevant donor restrictions; heightened board scrutiny of payout determinations; and commissioning our outside auditors to conduct enhanced procedures to confirm that our distribution of funds was appropriate. In addition, we expanded our communications and increased our accessibility in a variety of ways, including two "Open House" sessions conducted during the 2021 season. Further, we implemented new software to help produce our annual endowment fund reports, allowing us to provide timely and clear information to donors in an environmentally friendly manner, and setting the stage for more frequent interim and ad hoc reporting in the future.

We have also invested considerable time into analyzing the impact of endowment at Chautauqua, setting the stage for more strategic conversations about endowment in the future. At the same time, we have worked to identify new talent for our Board, preparing us to help expand the role that the endowment can play. We have an outstanding slate of new

directors ready to come aboard in 2021, and we're planning to bring on additional directors in 2022 to restore the board to full strength with a cohort of leaders specifically tailored to Chautauqua's emerging needs and challenges.

All of this work is being done with a clear-eyed view of the role endowment can and should serve in supporting the Institution in perpetuity. Our endowment must be large enough to ensure that Chautauqua's core remains secure, providing a solid launching pad for growing impact and influence. It also must be able to adapt with the needs of the time. The last year-and-a-half brought clarity to both of those propositions, highlighting the critical role the endowment plays in sustaining the Institution, and underscoring the incredible value and utility of unspecified and minimally restricted endowment funds. As you consider the role of your existing funds and your plans for future gifts, we ask that you keep both of those points in mind. In concert with that request, we pledge to continue our work to ensure that the Foundation staff and board warrant your trust as thoughtful and effective stewards.

With the return of in-person programming in 2021, it has been a joy seeing many of you back on the grounds and having the opportunity to re-engage with you. Please know that we are available to you — both during the season and year-round — to answer questions, take suggestions, or just to enjoy together our shared love of this glorious place. Until then, we wish you good health and, with deep sincerity, thank you for your trust and for your generous support of Chautauqua's endowment.

Sincerely,



M. Timothy Renjilian
Chair, Board of Directors



Deborah E. Moore, CPA
Executive Director





FINANCIAL REPORT

Financial Overview

It was a strong financial year for Chautauqua Foundation. We received \$4.2 million in endowment gifts, \$13.8 million in net investment income was earned, and \$4.45 million of endowment payout was made available to Chautauqua Institution. Net assets increased by \$12.8 million to over \$120 million.

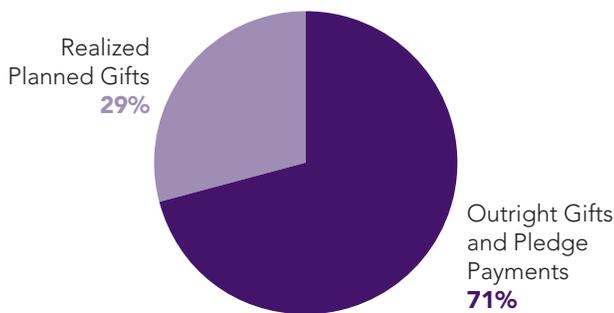
Chautauqua's planned giving program provided 59% of endowment gifts received in 2020 and represented 59% of the endowment commitments received in 2020. Over a 5-year time period, 29% of the endowment gifts received were realized planned gifts and 52% of the endowment commitments were planned gifts.

The net investment income included \$13.2 million of net realized and unrealized gains and the net annual return was 14.1%, which exceeded the benchmark of 12.0%. This would have been strong performance in any year but was especially strong after the market correction in March 2020.

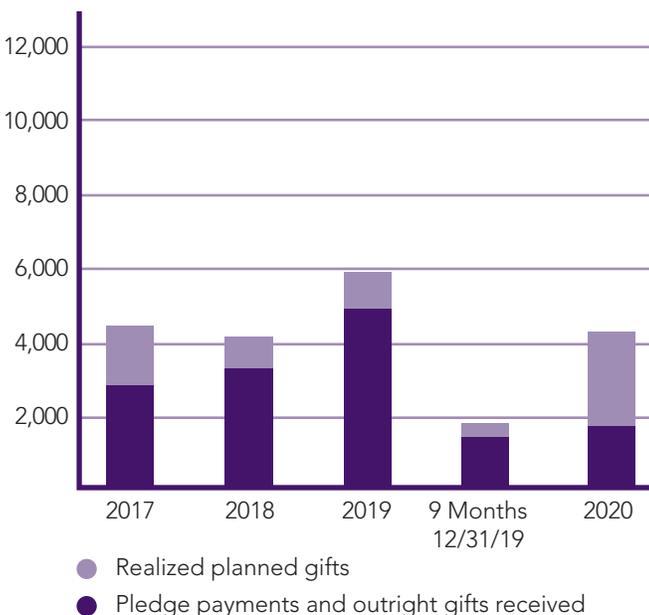
Although the Institution was not able to take full advantage of the endowment payout available in 2020 due to program changes as a result of the pandemic, \$3.55 million was paid to the Institution after careful review of the expenditures to ensure the individual restrictions for each endowment fund were satisfied.

Endowment Cash Received

Over the past five fiscal periods, cash received from outright gifts and realized planned gifts totaled \$20.6 million.

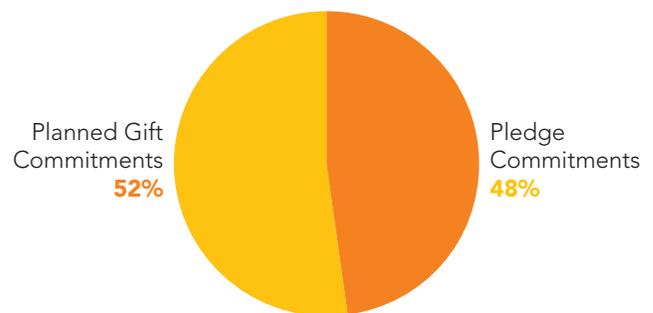


Cumulative percentage over five fiscal periods.



Endowment Commitments

Over the past five fiscal periods, pledge and planned gift commitments totaled \$30.7 million.



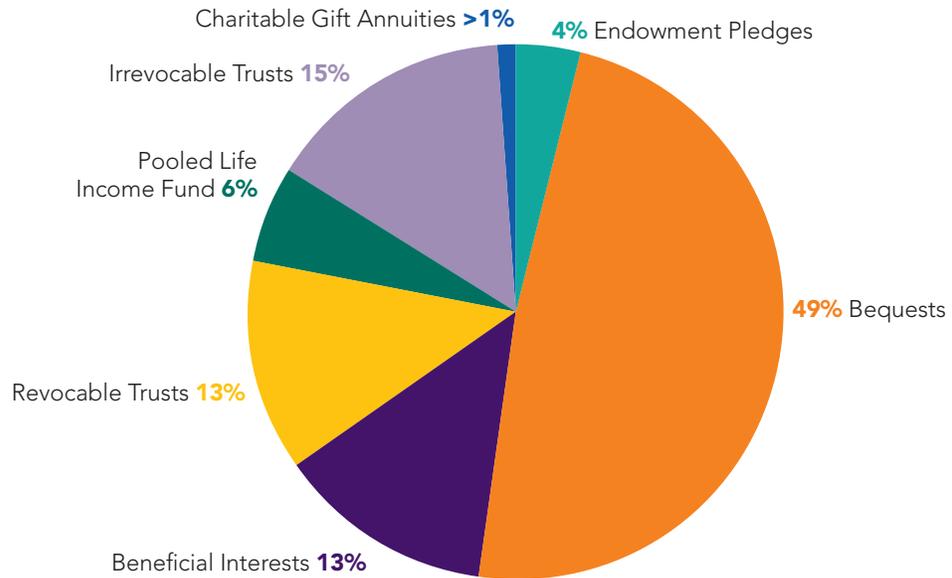
Cumulative percentage over five fiscal periods.



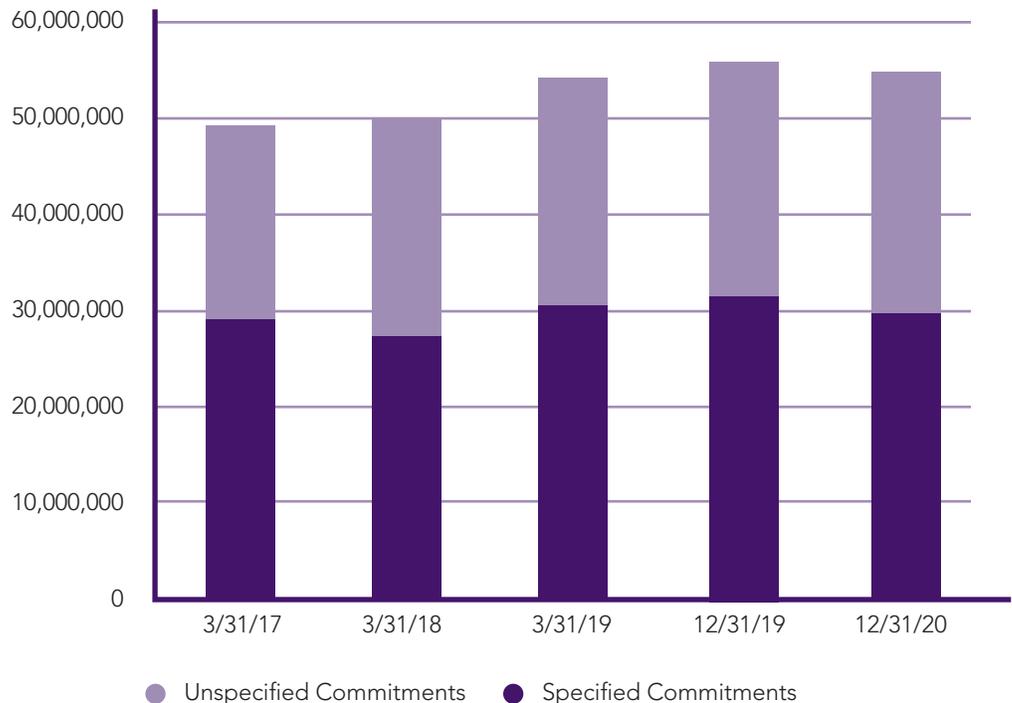
Future Commitments to Endowment

The Foundation has received both conditional and unconditional future commitments which, when combined with the previously stated intentions of donors total \$54.7 million as of December 31, 2020. The unconditional commitments have a total gross value of \$13.6 million and are recorded in the financial statements at net discounted values of \$2.3 million for cash pledges and \$4.1 million for split-interest agreements. The split interest agreements include gifts to the pooled life income fund, irrevocable trusts, and the gift annuity program held at the National Gift Annuity Foundation (NGAF). The conditional commitments are not recorded in the financial statements and have a total gross value of \$41 million, which represents bequests, revocable trusts, and beneficial interests.

This chart represents \$54.7 million of future commitments to endowment by type of commitment.



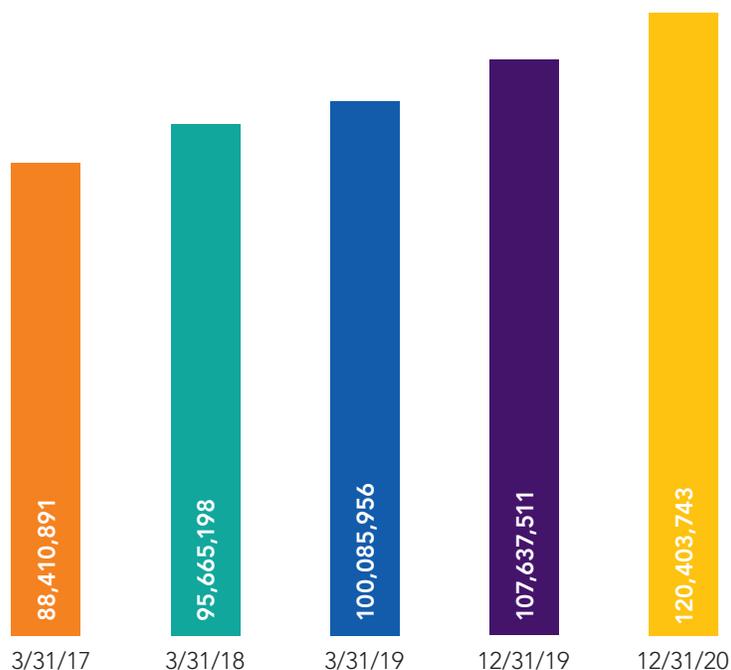
The total future commitments to endowment was \$54.7 million as December 31, 2020. Support from specified commitments is restricted in use on a fund by fund basis, while unspecified commitments support the general operations of the Institution.



FINANCIAL REPORT (CON'T)

Foundation Net Assets

During the year ended December 31, 2020, the net assets of the Foundation increased by \$12.8 million to reach \$120.4 million. Net assets are comprised of gifts already received and the net appreciation of those gifts, as well as the net discounted value of pledges and split-interest agreements.

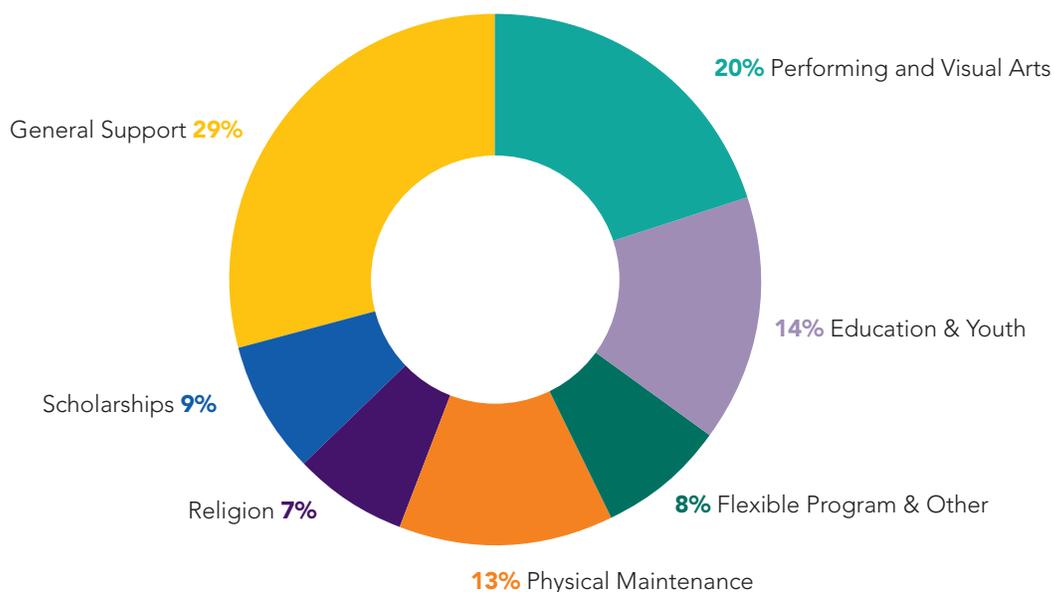


Number of Active Endowment Funds



Endowment Net Assets by Area of Support

Endowment funds are comprised of board-designated and donor restricted endowments to be held in perpetuity for the benefit of the Institution. This chart represents the allocation of the total net asset balances of 775 active endowment funds as of December 31, 2020, by area of support.





Amythyst Kiah performs at the Amphitheater August 2, 2021. Photo: Dave Munch

FINANCIAL REPORT (CON'T)

Investment Summary

Hirtle, Callaghan & Co. LLC serves as the Foundation's Outsourced Chief Investment Officer and actively manages the majority of the endowment portfolio and the other restricted funds. The remaining portion of the main endowment is invested in a fund of hedge funds, managed by Pointer Management, LLC.

The Investment Committee regularly reviews investment policies, strategy, execution and performance. Because asset allocation is the primary driver of a portfolio's total return over the long run, comparison of performance is viewed in the context of the portfolio's asset class holdings. During the year, the committee worked closely with Hirtle, Callaghan & Co. LLC to review the expected return of the endowment portfolio and adjusted the long-term target for the asset allocation.

The committee's oversight responsibilities cover \$116.9 million in invested assets. Each portfolio is managed according to its specific objectives, and has a unique asset allocation appropriate to those objectives. Investment performance is measured on a net basis, defined as total time weighted return after all investment management fees.

1) Endowment (\$112.5 million)

Individual endowment funds are pooled for investment purposes and tracked with unit accounting. This pooled approach enables endowment funds to collectively benefit from the diversification and efficiencies that are available to larger investors. Each endowment fund receives its proportionate share of return based on the market value of the endowment as a percentage of the total market value of the investment portfolio.

2) Temporarily restricted (\$1.3 million)

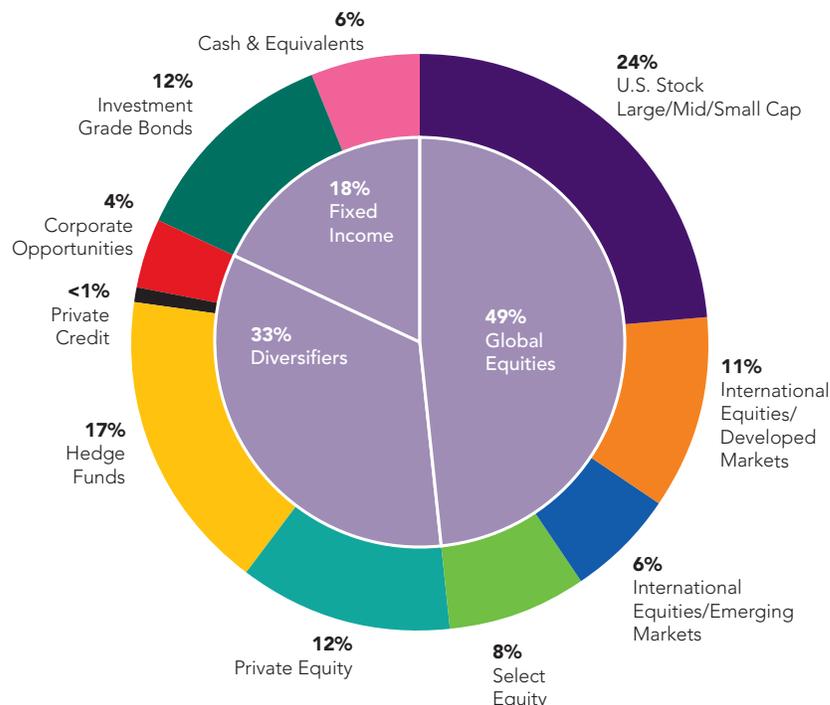
Other restricted funds are held and managed separately from the main endowment in one of two portfolios, employing conservative investment strategies. One portfolio is primarily held in cash and the other portfolio is invested in bonds as well as cash.

3) Pooled life income fund (\$3.1 million)

The pooled life income fund (PLIF) is managed by Key Private Bank. The management and investment strategy of the PLIF is reviewed annually. As of December 31, 2020, 40% of the PLIF assets were invested in equities, 60% in fixed income assets.

Endowment Asset Allocation

Total endowment portfolio market value was \$112.5 million as of December 31, 2020, allocated as shown in the accompanying table.

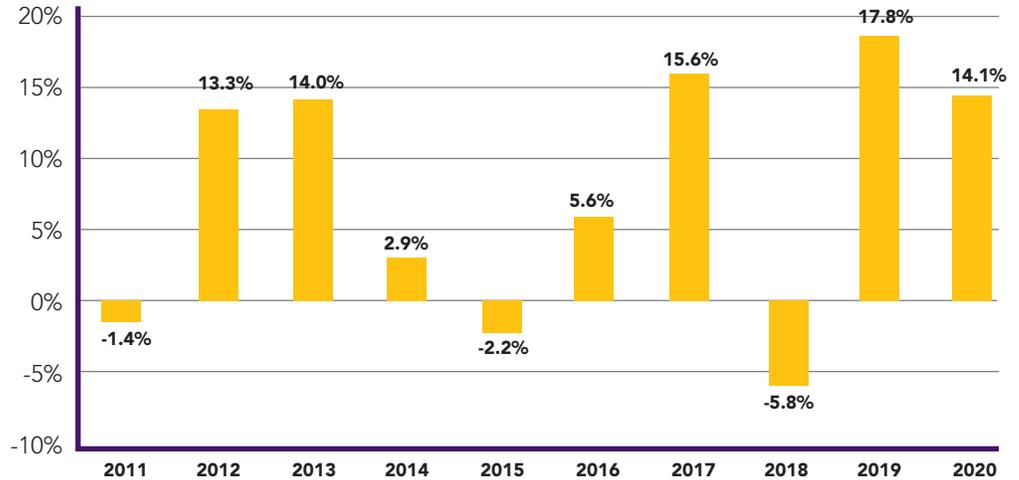


Annual Fiscal Year Performance

The Investment Committee takes a long-term approach, over full market cycles, to assess the performance of the portfolio. The performance has been restated from prior fiscal years ended March 31 to calendar years. The benchmark the committee uses to assess performance is net of fees and is diversified based on the strategic allocation of the Russell 3000, MSCI EAFE, HFR Strategic and BarCap Aggregate Bond indices. The benchmark is currently weighted 30% Russell 3000, 30% MSCI EAFE, 20% HFR Strategic and 20% BarCap Aggregate Bond.

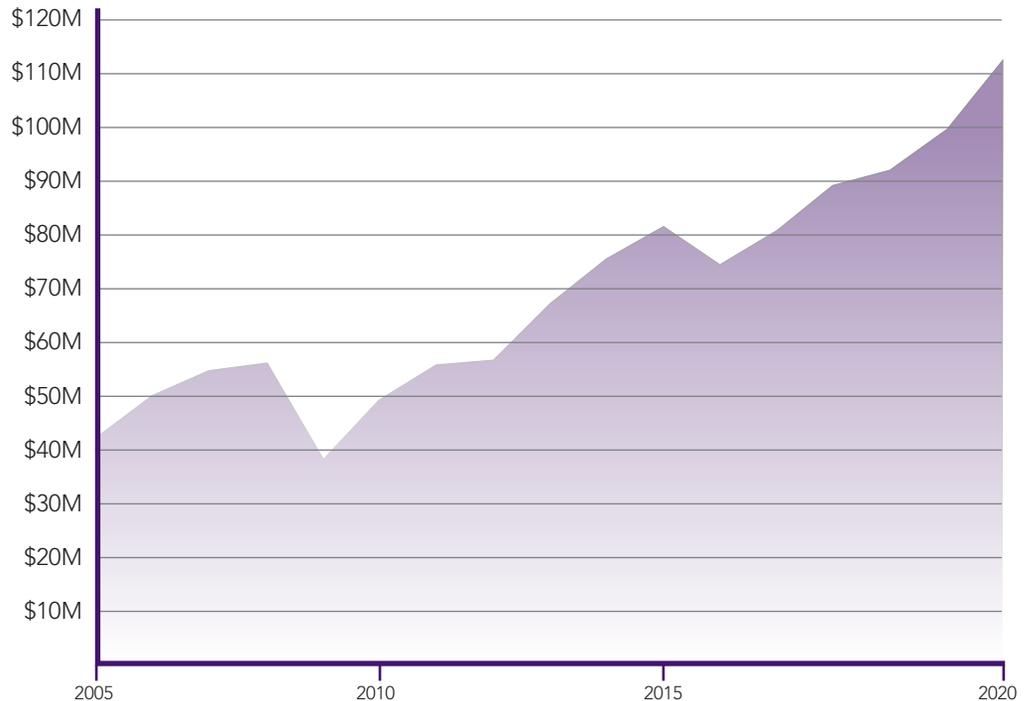
10-Year Annualized Returns

	12/31/16	12/31/17	12/31/18	12/31/19	12/31/20
Total Return	3.6%	4.0%	7.2%	6.8%	7.1%
Benchmark	3.0%	3.7%	6.7%	6.5%	6.7%



Endowment Investment Portfolio

This chart represents the endowment investment portfolio, which has grown by \$69.8 million, from \$42.7 million as of March 31, 2005, to \$112.5 million as of December 31, 2020.



REPORT OF INDEPENDENT AUDITORS

The Audit Committee reviewed and discussed the audited financial statements for the year ended December 31, 2020, with management and Lumsden & McCormick, LLP (L&M), the Foundation's independent auditor. The committee also concluded that L&M's provision of non-audit services, including tax preparation, is compatible with L&M's independence. The audited financial statements follow.

The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of December 31, 2020 and 2019, and the related statements of activities and cash flows for the year ended December 31, 2020 and the nine month period April 1, 2019 through December 31, 2019, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

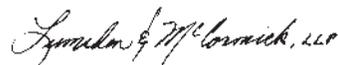
Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Foundation as of December 31, 2020 and 2019 and the results of its operations, changes in net assets and cash flows for the year ended December 31, 2020 and the nine month period April 1, 2019 through December 31, 2019, in accordance with accounting principles generally accepted in the United States of America.



May 14, 2021

STATEMENTS OF FINANCIAL POSITION

	2020	2019
Assets:		
Cash	\$ 1,199,430	\$ 1,240,824
Contributions receivable (Note 2)	2,270,341	2,820,471
Investments (Note 3)	113,463,972	101,252,805
Split-interest agreements	4,143,328	4,194,626
Other assets	578,800	395,000
	\$ 121,655,871	\$ 109,903,726
Liabilities and Net Assets:		
Liabilities:		
Payable to the Institution (Note 4)	\$ 1,201,912	\$ 2,020,247
Accounts payable and accrued expenses	50,216	245,968
	1,252,128	2,266,215
Net Assets (Note 5):		
Without donor restrictions	5,979,246	4,703,274
With donor restrictions	114,424,497	102,934,237
	120,403,743	107,637,511
	\$ 121,655,871	\$ 109,903,726

See accompanying notes.

STATEMENTS OF ACTIVITIES

Year Ended December 31, 2020

	Net Assets		
	Without Donor Restrictions	With Donor Restrictions	Total
Revenues:			
Contributions:			
Chautauqua Fund	\$ -	\$ -	\$ -
Endowment	855,236	3,197,276	4,052,512
Other	-	85,462	85,462
Change in value of			
split interest agreements	-	(51,298)	(51,298)
Investment income	616,953	13,223,846	13,840,799
Total revenues	1,472,189	16,455,286	17,927,475
Expenses:			
Direct support:			
Chautauqua Fund	-	-	-
Endowment direct support	4,450,000	-	4,450,000
Support from other funds	97,429	-	97,429
Indirect support			
General and administrative	613,814	-	613,814
Total expenses	5,161,243	-	5,161,243
Net assets released from restrictions	4,965,026	(4,965,026)	-
Change in net assets	1,275,972	11,490,260	12,766,232
Net assets - beginning	4,703,274	102,934,237	107,637,511
Net assets - ending	\$ 5,979,246	\$ 114,424,497	\$ 120,403,743

See accompanying notes.

Nine Months Ended December 31, 2019

Net Assets

	Without Donor Restrictions	With Donor Restrictions	Total
Revenues:			
Contributions:			
Chautauqua Fund	\$ -	\$ 4,291,683	\$ 4,291,683
Endowment	49,936	1,192,855	1,242,791
Other	-	6,145	6,145
Change in value of split interest agreements	-	167,007	167,007
Investment income	349,314	7,810,413	8,159,727
Total revenues	<u>399,250</u>	<u>13,468,103</u>	<u>13,867,353</u>
Expenses:			
Direct support:			
Chautauqua Fund	4,291,683	-	4,291,683
Endowment direct support	-	-	-
Support from other funds	22,199	-	22,199
Indirect support	1,680,492	-	1,680,492
General and administrative	321,424	-	321,424
Total expenses	<u>6,315,798</u>	<u>-</u>	<u>6,315,798</u>
Net assets released from restrictions	6,228,559	(6,228,559)	-
Change in net assets	312,011	7,239,544	7,551,555
Net assets - beginning	4,391,263	95,694,693	100,085,956
Net assets - ending	<u>\$ 4,703,274</u>	<u>\$ 102,934,237</u>	<u>\$ 107,637,511</u>

See accompanying notes.

STATEMENTS OF CASH FLOWS

	Year Ended December 31, 2020	Nine Months Ended December 31, 2019
Operating activities:		
Change in net assets	\$ 12,766,232	\$ 7,551,555
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Net realized and unrealized gains	(13,164,830)	(6,736,377)
Changes in other operating assets and liabilities:		
Contributions receivable	550,130	792,332
Receivable from split-interest agreements	51,298	(167,007)
Other assets	(183,800)	331,662
Payable to the Institution	(818,335)	(2,191,257)
Accounts payable and accrued expenses	(195,752)	30,716
Net operating activities	<u>(995,057)</u>	<u>(388,376)</u>
Investing activities:		
Purchases of investments	(12,021,310)	(7,410,566)
Proceeds from sales of investments	12,974,973	7,061,301
Net investing activities	<u>953,663</u>	<u>(349,265)</u>
Net change in cash	<u>(41,394)</u>	<u>(737,641)</u>
Cash - beginning	1,240,824	1,978,465
Cash - ending	<u>\$ 1,199,430</u>	<u>\$ 1,240,824</u>

See accompanying notes.

NOTES TO FINANCIAL STATEMENTS

1. Summary of Significant Accounting Policies:

Organization and Purpose:

Chautauqua Foundation, Inc. (the Foundation) was established in 1937 to raise, invest and reinvest funds to support the mission of Chautauqua Institution (the Institution) to provide cultural, educational, religious and other programs to a large and diverse audience.

Effective December 31, 2019, the fiscal year-end of the Foundation was changed from March 31 to December 31. Accordingly, the accompanying financial statements include comparative activity for the year ended December 31, 2020 and the nine months ended December 31, 2019.

Subsequent Events:

The Foundation has evaluated events and transactions for potential recognition or disclosure through May 14, 2021, the date the financial statements were available to be issued.

Tax Status:

The Foundation is a 501(c)(3) corporation exempt from income taxes under Section 501(a) of the Internal Revenue Code.

Cash:

At various times, cash in financial institutions may exceed federally insured limits and subject the Foundation to concentrations of credit risk.

Investments:

Investments are stated at estimated fair value. The fair value of marketable securities is determined by quoted prices in active markets. The Foundation uses net asset value (NAV) per share (or its equivalent) as a practical expedient to determine the fair value of investments that (i) do not have a readily determinable fair value predicated upon quoted prices in active markets, and (ii) have the attributes of an investment company or prepare their financial statements consistent with the measurement principles of an investment company (Note 8).

Contributions:

Contributions, including unconditional promises to give, are reported at fair value at the date received. Gifts are reported as restricted support if they are received with donor stipulations that limit their use. When a donor restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions.

Contributions that are expected to be collected in future years are recorded at net realizable value. The discounts on those amounts are computed using an interest rate applicable to the year in which the promise is received. Amortization of the discount is included in contributions revenue in the statements of activities.

Conditional promises to give to the Foundation are not recorded as revenue until such time as the conditions are substantially met, and totaled \$41,155,000 and \$41,963,000 at December 31, 2020 and 2019.

Split-Interest Agreements:

The Foundation receives contributions in the form of split-interest agreements which consist primarily of charitable remainder trusts and pooled life income funds. The estimated receivable under these agreements are recorded at the net present value of the estimate future benefits to be received based upon the life expectancy of the income beneficiaries using an appropriate discount rate. Subsequent changes in value are recorded as change in value of split-interest agreements in the statements of activities. The value of underlying assets of the split interest agreements were approximately \$11,221,000 and \$10,814,000 at December 31, 2020 and 2019.

Support to the Institution:

Distributions from the restricted endowment funds are made pursuant to the Foundation's spending policy guidelines and donor stipulations. All other distributions are made in accordance with donor restrictions and for purposes approved by the Foundation's Board. Prior to 2020, Chautauqua Fund contributions (as defined by the Institution) were received directly by the Foundation and distributed to the Institution in the same year received by the Foundation. Effective January 1, 2020, Chautauqua Fund contributions are no longer received by the Foundation.

Use of Estimates:

The preparation of financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Actual results could differ from those estimates.

2. Contributions Receivable:

	2020	2019
Gross unconditional promises to give	\$ 2,345,235	\$ 3,029,507
Less unamortized discount	74,894	209,036
	<u>\$ 2,270,341</u>	<u>\$ 2,820,471</u>

Contributions receivable at December 31, 2020 are expected to be received over the periods shown below:

Less than one year	\$ 1,277,170
One to five years	1,068,065
	<u>\$ 2,345,235</u>

NOTES TO FINANCIAL STATEMENTS

3. Investments:

	2020	2019
Cash	\$ 8,601,749	\$ 1,440,549
Equities	43,812,761	45,155,065
Fixed income	19,374,000	18,395,627
Hedge fund	19,602,858	21,664,595
Private equity/credit	13,265,707	10,596,969
Select equity	8,806,897	4,000,000
	<u>\$ 113,463,972</u>	<u>\$ 101,252,805</u>

Investment activity reported in the Statements of Activities is as follows:

Year Ended 12/31/20	Without Donor Restrictions	With Donor Restrictions	Total
Dividends and interest, net	\$ 45,371	\$ 630,598	\$ 675,969
Net realized and unrealized gains	571,582	12,593,248	13,164,830
	<u>\$ 616,953</u>	<u>\$ 13,223,846</u>	<u>\$ 13,840,799</u>

Nine Months Ended 12/31/19	Without Donor Restrictions	With Donor Restrictions	Total
Dividends and interest, net	\$ 72,056	\$ 1,351,294	\$ 1,423,350
Net realized and unrealized gains	277,258	6,459,119	6,736,377
	<u>\$ 349,314</u>	<u>\$ 7,810,413</u>	<u>\$ 8,159,727</u>

As of December 31, 2020, the Foundation has committed capital of approximately \$21,750,000 to private equity investments and the remaining obligation under these commitments totaled approximately \$7,665,000. These investments generally cannot be redeemed. Distributions from these investments are received as underlying investments and liquidated. At December 31, 2020, it is estimated the underlying assets will be liquidated over a period of approximately 5 to 15 years.

Liquidity of the Foundation's investments is as follows as of December 31:

	2020	2019
Redemption frequency:		
Daily	\$ 71,788,510	\$ 64,991,241
Quarterly	4,806,897	-
Semi-annually	19,602,858	12,215,787
Quarterly after initial lock-up period	4,000,000	4,000,000
Semi-annually after initial lock-up period	-	9,448,808
Nonredeemable	13,265,707	10,596,969
	<u>\$ 113,463,972</u>	<u>\$ 101,252,805</u>

4. Transactions with the Institution:

Distributions to the Institution primarily consists of appropriations from donor restricted endowment funds where the underlying restriction has been met and for purposes approved by the Foundation's Board. Other transactions include reimbursements to the Institution for various personnel and administrative expenses and from time to time amounts due to and due from each entity based upon donor intent.

Total amounts payable to the Institution is as follows at December 31:

	2020	2019
Endowment direct support	\$ 1,147,519	\$ 661,911
Board-designated appropriations	-	1,000,000
Other	54,393	358,336
	<u>\$ 1,201,912</u>	<u>\$ 2,020,247</u>

Effective January 1, 2020, the Office of Advancement was moved from the Foundation to the Institution. Prior to 2020, the Foundation's expenses related to the Office of Advancement were reported as indirect support in the accompanying financial statements as this activity was on behalf of the Institution. With the move of the Office of Advancement to the Institution, there are no expenses reported as indirect support for the year ended December 31, 2020.

For the year ended December 31, 2020, the Foundation agreed to reimburse the Institution in the amount of \$250,000 for certain administrative costs incurred on behalf of the Foundation. There was no such agreement for the nine months ended December 31, 2019.

In May 2016, the Foundation obtained a \$25,000,000 bank revolving credit note to facilitate financing the renovation of the Institution's amphitheater. The note is available until April 1, 2022 and has step down provisions to \$15,000,000 on April 1, 2020 and \$5,000,000 on April 1, 2021. The note bears interest at the LIBOR flex rate plus 1%, and contains a covenant requiring the Foundation to maintain a minimum balance in marketable

securities or cash of \$25,000,000. Additionally, the Foundation provides a negative pledge on all of its assets, and the note is guaranteed by the Institution. No borrowings on the arrangement were outstanding at December 31, 2020 and 2019.

Pursuant to a promissory note entered into between the Foundation and Institution, all amounts advanced under the bank revolving credit note for the benefit of the Institution will be repaid to the Foundation with interest at the Internal Revenue Service's applicable federal rate for mid-term borrowings.

5. Net Assets:

The Foundation's financial position and activities are reported according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. Net assets with donor restrictions are those whose use has been limited by donors for a specified time period, purpose or to be maintained by the Foundation in perpetuity.

The composition of net assets without donor restrictions is as follows at December 31:

	2020	2019
Board-designated endowments	\$ 4,935,482	\$ 3,706,438
Unrestricted gifts	1,043,764	996,836
	<u>\$ 5,979,246</u>	<u>\$ 4,703,274</u>

Net assets with donor restrictions that are purpose or time restricted are comprised of unappropriated endowment gains and restricted gifts as follows:

	2020	2019
Gains - specified endowments	\$ 19,989,741	\$ 13,206,045
Gains - unspecified endowments	5,829,304	3,849,586
Other restricted gifts	310,025	320,713
	<u>\$ 26,129,070</u>	<u>\$ 17,376,344</u>

Net assets with donor restrictions that represent the accumulated principal of endowment gifts that have been restricted by donors to be maintained by the Foundation in perpetuity are comprised of the following endowment gift categories:

	2020	2019
Specified endowments	\$ 65,150,562	\$ 62,701,741
Unspecified endowments	23,144,865	22,856,152
	<u>\$ 88,295,427</u>	<u>\$ 85,557,893</u>

From time to time, the fair value of assets associated with

individual donor-restricted endowment funds may fall below the level the donor requires the Foundation to retain as a fund of perpetual duration. The Foundation permits spending from underwater endowment funds unless otherwise precluded by donor intent or relevant laws. Deficiencies of this nature exist in three donor restricted endowment funds, which together have an original gift value of \$50,335 and a deficiency of \$6,817 as of December 31, 2020.

6. Retirement Plan:

The Foundation participates in a 403(b) retirement plan for substantially all employees, subject to plan conditions. The Foundation contributes 10% of the employee's gross pay each year. Funded contributions and costs totaled approximately \$15,000 for the year ended December 31, 2020 and \$68,000 for the nine months ended December 31, 2019.

7. Financial Assets Available for Operating Purposes:

The Foundation obtains financial assets primarily through contributions and investment income. The financial assets are acquired throughout the year to help meet the Foundation's cash needs to provide support to the Institution and for general expenditures in accordance with the Foundation's spending policy.

8. Fair Value Measurements:

As described in Note 1, the Foundation's investments are stated at estimated fair value. The fair values of these assets are determined as follows at December 31:

	2020	
	Quoted Prices in Active Markets	Net Asset Value
Cash	\$ 8,601,749	\$ -
Equities	43,812,761	-
Fixed income	19,374,000	-
Hedge fund	-	19,602,858
Private equity/credit	-	13,265,707
Select equity	-	8,806,897
	<u>\$ 71,788,510</u>	<u>\$ 41,675,462</u>
	2019	
	Quoted Prices in Active Markets	Net Asset Value
Cash	\$ 1,440,549	\$ -
Equities	45,155,065	-
Fixed income	18,395,627	-
Hedge fund	-	21,664,595
Private equity	-	10,596,969
Select equity	-	4,000,000
	<u>\$ 64,991,241</u>	<u>\$ 36,261,564</u>

NOTES TO FINANCIAL STATEMENTS

9. Endowment Assets:

The Foundation's endowment assets are comprised of board-designated endowments and donor restricted endowments to be held in perpetuity. The Foundation has adopted investment and spending policies for endowment assets that attempt to provide returns sufficient to address the purposes of the assets over the long term. According to the Foundation's spending policy for support to the Institution, as well as general and administrative expenses, total spending should range from 3% to 6.5% of the beginning of year market value of the Foundation's endowment investment assets. Distributions from the board-designated endowment funds are made at the discretion of the Foundation's Board.

The Foundation's Board has interpreted the New York Prudent Management of Institutional Funds Act (NYPMIFA) as requiring the preservation of the fair value of the original gift as of the gift date of donor endowment funds, absent explicit donor stipulations to the contrary. As a result of this interpretation, the Foundation classifies as net assets with donor restrictions (a) the original value of gifts donated to be maintained in perpetuity, (b) the original value of subsequent gifts to the endowment fund, and (c) accumulations to the endowment fund made in accordance with the direction of a donor gift instrument at the time the accumulation is added to the fund. In accordance with NYPMIFA, the Foundation considers the following factors to appropriate or accumulate donor restricted endowment funds:

- Duration and preservation of the fund
- Purposes of the Foundation and the fund
- General economic conditions
- Possible effects of inflation and deflation
- Expected total return from income and appreciation of investments
- Other Foundation resources
- Where appropriate and circumstances would otherwise warrant, alternatives to expenditure of the endowment fund, giving due consideration to the effect that such alternatives may have on the Foundation
- Investment policy of the Foundation

Investment activity is allocated among the endowment assets based upon their proportionate share of the investment portfolio. Investment activity related to the board-designated endowment is shown as an increase (decrease) in net assets without donor restrictions. Investment income related to the donor-restricted endowments is reported as an increase (decrease) to net assets with donor restrictions until appropriated in accordance with the Foundation's spending policy.

The Foundation's endowment investment assets activity for the year ended December 31, 2020 and the nine months ended December 31, 2019 is as follows:

	Without Donor Restrictions		With Donor Restrictions		Total
	Board-Designated	Unappropriated Earnings	Accumulated Principal		
Year Ended December 31, 2020					
Endowment assets – Beginning of year	\$ 3,706,438	\$ 17,055,631	\$ 78,554,552	\$	99,316,621
Investment income	563,884	13,222,566	-		13,786,450
Contributions	855,236	-	3,338,326		4,193,562
Other adjustments	-	408,445	-		408,445
Appropriated	(190,076)	(4,867,597)	-		(5,057,673)
Endowment assets – end of year	\$ 4,935,482	\$ 25,819,045	\$ 81,892,878	\$	112,647,405

Nine Months Ended December 31, 2019

Endowment assets – Beginning of period	\$ 3,431,848	\$ 11,023,210	\$ 76,702,976	\$	91,158,034
Investment income	308,524	7,804,230	-		8,112,754
Contributions	49,936	-	1,851,576		1,901,512
Other adjustments	-	145,367	-		145,367
Appropriated	(83,870)	(1,917,176)	-		(2,001,046)
Endowment assets – end of period	\$ 3,706,438	\$ 17,055,631	\$ 78,554,552	\$	99,316,621

10. Expenses by Nature and Function:

Year Ended December 31, 2020	Program		General and Administrative	Total
	Direct Support	Indirect Support		
Fund appropriations	\$ 4,547,429	\$ -	\$ -	\$ 4,547,429
Personnel costs	-	-	273,051	273,051
Institution supporting services	-	-	250,000	250,000
Travel and hospitality	-	-	2,245	2,245
Professional and consulting	-	-	63,551	63,551
Other	-	-	24,967	24,967
	\$ 4,547,429	\$ -	\$ 613,814	\$ 5,161,243

Nine Months Ended December 31, 2019	Program		General and Administrative	Total
	Direct Support	Indirect Support		
Fund appropriations	\$ 4,313,882	\$ -	\$ -	\$ 4,313,882
Personnel costs	-	1,213,072	234,081	1,447,153
Travel and hospitality	-	144,427	21,414	165,841
Professional and consulting	-	134,884	37,862	172,746
Other	-	188,109	28,067	216,176
	\$ 4,313,882	\$ 1,680,492	\$ 321,424	\$ 6,315,798

The financial statements report certain categories of expenses that are attributable to program and supporting functions. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include personnel costs, which are allocated based on estimates of time and effort.

11. Risks and Uncertainties Related to COVID-19:

On January 31, 2020, the United States Secretary of Health and Human Services (HHS) declared a public health emergency related to the global spread of coronavirus COVID-19, and a pandemic was declared by the World Health Organization in February 2020. Efforts to fight the widespread disease included limiting or closing many businesses and resulted in a severe disruption of operations for organizations. Financial markets also experienced significant fluctuations in value.

The full extent of the impact of COVID-19 on the Foundation's financial performance will depend on further developments, including the duration and spread of the outbreak, and its impact on the financial markets and the Foundation's donors and the Institution, none of which can be predicted.

ENDOWMENT FUNDS

UNSPECIFIED FUNDS

\$31,591,039 Net Assets

\$1,213,455 Support to the Institution

New funds are designated in **orange**. Income and principal may be distributed from the funds denoted with a **teal** dot.

- Paul M. Alexander Fund
- Mary Apple Fund
- Katherine G. Bailey Fund
 - Arthur S. and Barbara F. Banner Endowment for Chautauqua
 - Robert and Je'Anne Bargar Endowment
 - Zoe and Ken Barley Endowment
 - Beatrice B. Bates Fund
 - Nancy and Dick Bechtolt Fund
 - Thomas and Jane Becker Endowment
 - Josephine A. Bell Endowment for Chautauqua
 - Bemus Fund for Chautauqua
 - Gordon Benn Fund
 - Alan J. and Mary Hough Blair Fund
- The Erika Block Fund for Chautauqua
 - Martha Borowsky Endowment Fund
 - Bosland Family Fund
 - Boyle Family Fund
 - Barbara A. and Patrick James Brady III Endowment for Chautauqua
 - Sara E. Bradley Endowment for Chautauqua
 - Barbara and William Branch Fund
 - Daniel and Wanita Bratton Endowment
 - Lillian Brink Endowment Fund
 - Gary M. and Willow R. Brost Endowment for Chautauqua
 - Henrietta T. Campbell Fund
 - Maxine M. Carleton Fund
 - Katharine J. Carnahan Endowment
 - Barbara P. and Howard E. Chadwick Fund
 - Genevieve Chaney Fund
 - Julia and William Clinger Fund
 - Marion and Eugene Cohen Fund
 - Ruth K. Collyer Endowment
 - Jack and Marcia Connolly Fund for Chautauqua
- The Mildred K. Cooper Fund for Chautauqua
 - William F. and Thelma L. Cooper Endowment for Chautauqua
 - Helen and George L. Cornell Fund
 - Katharine and Robert W. Cornell Fund
 - Sarah A. Corns Fund
 - Martha S.H. Cowles Fund
 - Helen T. and Ralph E. Crockett Endowment
 - Laura and Brad Currie Endowment for Chautauqua
 - Elizabeth Danielson Fund
 - Charles and Rebecca Denton Endowment for Chautauqua
 - Dietrich Family Endowment at Chautauqua
- Martha T. and Morgan O. Doolittle Fund
- Lora Lee and Bob Duncan Endowment
- Ann O. Edison Endowment
- Albert C. Elser II Fund
- Cordelia C. Ensign Fund
- James E. Erickson Fund
- Helen C. Estabrook Fund
- Agnes H. and Hal A. Fausnaugh Fund
- Fetterolf Family Fund
- George L. Follansbee, Jr. and Gay E. Didget Endowment for Chautauqua
- James L. Flynn and Shirley Mix Flynn Endowment for Chautauqua
- Joanne Babcock Fuller Endowment
- Gelb Family Endowment for Chautauqua
- William R. and Betsy Callicott Goodell Endowment
- Kathleen M. and Donald C. Greenhouse Endowment for Chautauqua
- Jean Edgcombe Groff Endowment for Chautauqua
- Groninger Family Fund
- Habenicht Family Fund
- Felicia Grace Hall Fund
- Tirzah H. Hall Fund
- Sarah R. Hankey Fund for Chautauqua
 - Diana and Samuel Harbison Endowment
 - Walter O. and Joan S. Harf Fund
 - W. Murray and Pegi M. Hamner Endowment for Chautauqua
 - Heber R. Harper Fund
 - Drs. Thomas J. and Patricia H. Hasbach Endowment for Chautauqua
 - Eleanor McKnight Haupt Endowment for Chautauqua
 - Charles H. Heinz Fund
 - Lisa Heinz Endowment for Chautauqua
 - Dorothy S. and William F. Hill, II Endowment for Chautauqua
 - Holden Family Fund
 - The Burritt and Joanne Hubbard Family Fund
- Margaret A. Hukill Endowment for Chautauqua
 - Charles R. Hunter, Jr. Fund
 - Esther M. Huntoon Fund
 - Verna Jackson Memorial Endowment for Chautauqua
 - James Family Fund
 - Donald D. Jansen Endowment for Chautauqua
 - Katherine King Karlslake Fund
 - Ronald L. and Rosie C. Kilpatrick Endowment
 - Georgiana Bole King Endowment
- The Lawrence G. Knecht Fund
 - Knox Family Endowment
- Frank and Bitsy Koehler Endowment for Chautauqua
 - Konneker Fund
 - Mary E. Kuhns Fund
 - Robert and Susan Laubach Endowment
 - LeClere Family Endowment
 - The Lemonade Fund

Elizabeth S. & Reginald A. Lenna Fund
 Stella C. Logan Fund
 Sara M. and Robert S. Lucas Fund
 Stan and Sara Lundine Fund
 Lyndall Family Fund
 Ann and Charles H. Lytle Endowment
 Jeannette B. Mainwood Fund
 Gerald and Dorothea Maloney Endowment
 Clara Masik Endowment
 Lillian W. Masters Endowment for Chautauqua
 Candace and Scott Maxwell Fund

- Mary E. McCarn Fund
- Mary Jane and Donald McClurg Endowment
- Margaret C. Mercer Endowment
- Richard H. Miller Fund
- Dawson E. Charlotte B. Molyneaux Endowment
- Jane C. Morgan Fund
- Lewis W. & Katherine C. Morgan Fund
- James R. Morris III Fund
- The George E. and Susan Moran Murphy Family Fund
- Orlov Family Fund for Chautauqua
- Robert B. and June A. Osburn Fund
- Robert Pace Endowment Fund
- Mary C. and James A. Pardo, Jr. Endowment for Chautauqua
- Mary C. and William H. Park Fund
- Mary Lou Cady Parlato Endowment for Chautauqua
- Charles E. and Gladys W. Peirce Fund
- Donald R. Pembridge and Rosalie H. Pembridge Endowment for Chautauqua
- Margaret Penn Fund
- Sheila Penrose and Ernest Mahaffey Endowment for Chautauqua
- Steven W. and Barbara P. Percy Endowment for Chautauqua
- Helen Pickup-Hyman Fund
- Mary Ellen Pindyck Fund
- Sam and Petey Tinkham Price Family Fund
- Evelyn Joyce Ramsdell Fund
- Mary Oram Reading Fund
- Agnes H. Reigart Fund
- Renjilian Family Fund
- Elaine Y. Rieser Endowment for Chautauqua
- William Rittman Fund
- Mary Ritts Endowment
- Walter Roberts Fund
- David M. and Sarah A. Rosen Endowment for Chautauqua
- Stephanie Rosenblatt Fund
- Doris H. Ruslink Fund
- Harper G. and Blanche Billings Rusterholtz Fund
- Herbert B. Sachse Fund
- Howie and Bobby Schiller Endowment for Future Generations of Chautauquans
- Newton B. Schott, Jr. and Antoinette L. LeQuire-Schott Endowment
- Barbara and John Schubert Endowment Fund
- Dr. O. Peter Schumacher Fund
- Helene J. Schwartz Endowment for Chautauqua
- Mary Jo Walton Schweizer Endowment for Chautauqua
- Jo and Bill Selnick Fund
- Emma O. and H. Parker Sharp Fund
- Jane R. and Walter C. Shaw, Jr. Fund
- Ralph C. Sheldon, Jr. Fund
- Dorothy E. Shepherd Fund
- Allen and Elaine Short Endowment for Chautauqua
- Bert W. and Joanne R. Simons Endowment
- Elizabeth M. Smith Memorial Endowment for Chautauqua
- J. Vance Smith and Robert M. Smith Fund
- George T. and Margaret D. Snyder Endowment for Chautauqua
- Nancy Coburn Snyder Endowment Fund
- Thomas H. and Joan Stevens Family Endowment for Chautauqua
- Betty P. and J. Bruce Stromgren Fund
- Ann H. and Daniel F. Sullivan Endowment for Chautauqua
- The Robert C. and Patricia D. Switzer Family Fund
- Tate Family Fund
- Eleanor M. Thomas Fund
- The Susan and John Turben Foundation Endowment for Chautauqua
- Joseph & Elizabeth Verlie Endowment
- Carl A. and Mary Louise Viehe Family Endowment
- Debby and Dick Wade Endowment for Chautauqua
- Nina and Norman Wain Family Endowment for Chautauqua
- Carol and Bill Ward Endowment for Chautauqua
- Evelyn Wargo Endowment
- Charles and Lois Weaver Fund
- Nina T. Wensley Fund
- Helen N. White Fund
- Robert O. Wilder Family Fund
- The Mary S. Wilsdon Fund for Chautauqua
- Betty Offutt Wood and BRAVAS Endowment for Chautauqua
- Henry L. Wood Fund
- John B. Yoder Endowment for Chautauqua
- Robert and Virginia Young
- The Deborah and Allen Zaretsky Fund
- Stephen J. Zenczak and Patricia E. Feighan Endowment for Chautauqua
- General Endowment Fund

SPECIFIED FUNDS

\$81,220,541 Net Assets

\$3,236,545 Support to the Institution

New funds are designated in orange.

PHYSICAL

MAINTENANCE FUNDS

\$15,398,161 Net Assets

\$612,512 Support to the Institution

Buildings and Structures

\$13,029,022 Net Assets

\$514,344 Support to the Institution

Amphitheater Endowment Fund
Jack G. and Elizabeth L. Armstrong Fund for Youth Facilities
Bellinger Hall Maintenance Endowment
The Francis and Susan Bonsignore Youth Facilities Fund
Bratton Theater Endowment Fund
Carnahan-Jackson Endowment for Dance Studio Maintenance
Chautauqua Opera Guild Endowment for Connolly
Residence Hall
Children's School Fund
The CLSC Class of 2000 Mosaic Fund
Mary E. Collier Memorial Fund
Connolly Residence Hall Endowment
Coyle Pavilion Fund
Crowder Family Youth Endowment Fund
Department of Religion Physical Facilities Fund
Mina Miller Edison Fund
The Dorothy J. Forney Memorial Fund
Fowler-Kellogg Art Center Endowment
The Joseph and Anna Gartner Foundation Endowment for
Bonnefoux-McBride Hall
Golf Course Maintenance and Growth Fund
The Seth A. and Helen F. Goodwin Fund to Maintain the
Pier Building
Kitty and Bluie Greenberg Amphitheater Endowment
Hagen-Wensley Guest House Endowment
Helen Heinz Sample Fund
Hitchcock Room Maintenance Fund
The Forest B. Irwin Fund for Bowling Green Maintenance
The Knox Fund for Youth Facilities
Elizabeth S. Lenna Hall Endowment Fund
The Helen Colvill Lincoln Fund to Maintain Lincoln
Memorial Dormitory
Anne R. Logan Fund
Jackie Lynch Studio Endowment
The Massey Memorial Organ Fund
The McClure Shuffleboard Fund
McKnight Hall Maintenance Endowment
Miller Edison Cottage Endowment

Kimberly and Robert Myers Dance Facilities Endowment
The Oliver Archives Center Endowment Fund
The I. Hale and Judy Oliver Fund for Bratton Theater
I. Hale and Judy Oliver Endowment for Connolly Residence Hall
The Rait Family Fund
The Ann Simpson Rice Youth Fund
School of Music Facilities Endowment
The Sharpe/Trefts Memorial Fund
Strohl Center Endowment
The Susan and John Turben Fund for Bratton Theater
The Sybil and Stuart Willen Fund for Bratton Theater
Youth Facilities Fund

Specific Gardens and Parks

\$1,709,846 Net Assets

\$70,905 Support to the Institution

The Reid B. Babcox Memorial Garden Terrace Endowment
The Bell/Ritts Garden Fund
Arline and Ralph Bernstein Memorial Rain Garden Fund
The Bishop's Garden Fund
Selina W. Braham Memorial Garden Fund
Judge W. Walter Braham Garden Fund
Dr. Daniel and Wanita Bratton Garden Fund
The Henrietta T. Campbell Garden Fund
Carnahan-Jackson Memorial Garden Fund
The Carothers Family Garden Fund
The Kirk David Casto Memorial Garden Fund
Jean Chadwick Memorial Garden Fund
The CLSC Class of 1982 Helen W. Giacobine Garden Fund
Connolly Family Gardens and Fountains Endowment
The Cornell Garden Fund
DeeDee's Garden Endowment
The Ehrenreich Family Fund
The Fausnaugh Family Garden Fund
J. Marcus and Ellen Bernstein Fultz Family Gardens
Peggy Foley Memorial Garden Fund
The Jean Rice Goodell Garden Fund
The Robert Y. Gromet Family Garden Fund
The Mary Kimball Haker Memorial Garden Endowment Fund
The Eleanor McKnight Haupt Fund
The Holden Garden Fund
Patricia K. Ives Memorial Beautification Fund
Melvin Johnson Sculpture Garden Endowment
Henrietta Ord Jones Memorial Fund
The JoAnn Jubell Memorial Fund
The Judson Park Fund
Ryan Kiblin Memorial Stormwater Park Endowment
Janet F. and Arthur C. LeVan, Sr. Garden Fund
Joan Lincoln Garden Fund
The Winifred B. McCune Memorial Garden Fund
Miller Edison Cottage Garden Endowment
Mary Louise Molyneaux Garden Fund
Penneys Garden Endowment

Ride/Savage Memorial Garden Fund
Timothy Ritacco Play Area Endowment
The Michael M. Ross Garden Fund
The Mme. Shao Fang Sheng Garden Fund
Toni Sterman Memorial Garden
The Stephen Toms Garden Fund
Randall E. Widrig Memorial Garden Fund
Nancy Hyde Wilbur Memorial Fund
The Dr. Alan Winkelstein Garden Fund
The Roy and Dorothy Wissel Garden Fund
The Frank Lloyd Wright Garden Fund
The Frank Lloyd Wright School of Architecture and Taliesin Fellowship Garden Fund

General Grounds and Gardens
\$659,292 Assets
\$27,263 Support to the Institution

D.A.R. Flag Fund
Garden Beautification Fund
Lake, Grounds, and Public Spaces Endowment
Louise Marshall Lincoln Memorial Garden Fund
The Constance Lincoln Newbury Memorial Garden Fund
The Walter C. Shaw, Jr. Family Tree Fund
Tree Fund
Watters Family Fund

EDUCATION & YOUTH FUNDS
\$15,650,190 Net Assets
\$636,257 Support to the Institution

Lectureships
\$11,301,403 Net Assets
\$458,348 Support to the Institution

10:45 Lecture Platform Endowment
Malcolm Anderson Lecture Fund

The Sondra R. and R. Quintus Anderson Lectureship
Helen S. and Merrill L. Bank Lectureship
David and Wendy Barendfeld Lectureship Fund
The Crawford N. and May Sellstrom Bargar Lectureship in Business and Economics
Robert S. Bargar Memorial Lectureship
The Arnold and Jill Bellowe Lectureship
Berglund-Weiss Lectureship Fund
June and Albert Bonyor Lectureship Fund
Dr. Edwin Prince Booth Memorial Lectureship Fund
The Boyle Family Lectureship Fund
Selina and Walter Braham Lectureship
The Richard Newman Campen "Chautauqua Impressions" Fund
Carnahan-Jackson Lectureship
Chautauqua Fellows Fund
William and Julia Clinger Lectureship
Beverly and Bruce Conner Endowment for Education
The Joseph H. DeFrees Memorial Lecture
The Edith B. and Arthur E. Earley Lectureship
The Eleanor Fund Lectureship Endowment
The Foglesong Family Lectureship Fund
The Charles and Gail Gamble Lecture Endowment
Barbara A. Georgescu Lectureship Endowment
The Charles Ellsworth Goodell Lectureship in Government and Public Affairs
The Susan Hirt Hagen Lectures Fund
The Thomas L. Hagner and Linda Ulrich-Hagner Lectureship Fund
Travis E. and Betty J. Halford Lectureship Endowment
G. Thomas and Kathleen Harrick Lectureship Endowment
The Dr. Robert R. Hesse Lectureship
The Higie Family Lectureship
[Sue Hammond Innes Lectureship in Science](#)
The Robert Jacobs Memorial Lectureship Fund
Richard W. and Jeannette D. Kahlenberg Lectureship Fund



Photo: Kristen Triplett

The Kevin and Joan Keogh Family Fund
 Barbara and Herb Keyser Fund
 Donald West King, Sr. and Francis Lila Lee King Lectureship
 The Oliver and Mary Langenberg Lectureship
 The Reginald and Elizabeth Lenna Lectureship in Business and Economics
 The Helen C. Lincoln Fund for International Programming
 The Louise Roblee McCarthy Memorial Lectureship
 McCredie Family Fund
 National Endowment for the Humanities Fund
 Joseph A. Neubauer Lectureship in Science
 Margaret Miller Newman Lectureship Fund
 Kathryn Sisson Phillips Memorial Lectureship Fund
 The Richard and Emily Smucker Endowment Fund
 Marjorie and Frank Sterritte Lectureship
 The Ethel Paris and Theodore Albert Viehe Lectureship
 John M. Wadsworth Lectureship on Free Market and Libertarian Principles
 The Dorothy M. Wissel Lectureship

Literary Arts

\$1,402,812 Net Assets

\$57,858 Support to the Institution

The Baird-Fuller Memorial Fund
 Caroline Roberts Barnum and Julianne Barnum Follansbee Fund
 The Alice M. Bentley CLSC Memorial Fund
 John H. Bliss Memorial Fund
 Lowell & Frances Hyams Brentano Library Fund
 Chautauqua Literary Arts Endowment
 Chautauqua Prize Endowment Fund
 C.L.S.C. Class of 1940 Endowment Fund
 C.L.S.C. Class of 1948 Endowment Fund
 The Louise Shaw Van Kirk Dill Fund
 The Paul and Mary Jean Irion Endowment
 The Mary Anne and John Morefield Endowment for the Enhancement of Poetry
 The Bess Sheppard Morrison CLSC Fund
 William A. Morrow Fund
 Gail Anne Clement Olson Fund
 The Martha and Scott Reading Fund
 Grace Tongren Ross Fund for Smith Memorial Library
 Smith Memorial Library Fund

Youth Activities

\$730,430 Net Assets

\$29,841 Support to the Institution

Ward T. Bower Youth Activities Memorial
 Elizabeth Elser Doolittle Endowment Fund for Youth
 The Gelb Family Endowment Fund
 Gelb Family Fund
 Cyril T. M. Hough and Lt. C. Randall Hough, USMC Memorial Fund
 The Katie Howard Memorial Fund

Julius A. and Carol L. Nicolai Boys' and Girls' Club Endowment
 The Popp Family Fund
 Paul L. Sample Memorial Fund
 Andrew and Donna Sorensen Youth Activities Center Endowment
 James R. and Alison T. Steadman Boys' and Girls' Club Endowment
 The Laurence and Maria Wagner Family Fund
 Youth Activities Fund

Other

\$2,215,545 Net Assets

\$90,210 Support to the Institution

Lillian Brink Education Fund
 Barbara R. Foorman Science Literacy Endowment
 McCredie Family Director of Boys' and Girls' Club
 Emily and Richard Smucker Directorship for Education

FINE & PERFORMING

ARTS FUNDS

\$22,359,353 Net Assets

\$914,494 Support to the Institution

General

\$4,765,208 Net Assets

\$193,073 Support to the Institution

The John T. and Katherine G. Bailey Family Fund
 Evie and Stacey Berger Endowment for Emerging Artists
 The Boyle Family Fund for the Performing Arts
 Emily McKnight Corry Endowment
 The Barbara Baldwin DeFrees Fund for the Performing Arts
 The Edith B. and Arthur E. Earley Fund for the Performing Arts
 The Endowment Fund for the Performing Arts
 John Alfred and Oscar Johnson Memorial Trust
 The Lenna Fund for the Performing Arts
 The Helen Cooper Mercer Fund for Performing Arts
 National Endowment for the Arts Fund
 The Rittman Family Fund for Performing Arts
 The Julia and Ralph C. Sheldon, Jr. Fund for the Performing Arts

Opera

\$4,941,574 Net Assets

\$205,716 Support to the Institution

A. Chace & Josephine B. Anderson Opera Endowment Fund
 John E. Anderson Opera Endowment
 The Peggy and Andy Anderson Family Fund for Opera
 The Cynthia Auerbach Fund for Opera
 Bemus Endowment for Opera
 Anne and John Burden Opera Fund
 Chautauqua Opera Endowment Fund
 The Chautauqua Opera Guild Endowment
 Thomas and Kathleen Clingan Fund for Opera
 The Connolly Family Fund For Opera

The John A. and Emily McKnight Corry Opera Fund
 The Barbara Baldwin DeFrees Opera Fund
 The Walter F. Ferchen Opera Fund
 The Eleanor B. Franks Fund for the Opera
 The James and Elisabeth Groninger Fund for Opera
 The Jane A. Gross Opera Endowment
 The Kay Frantz Israel Fund for Opera
 The Mildred Lesenger Fund for Opera
 The Kay H. Logan Opera Fund
 The Annette Pickens Malvin Memorial Fund for Opera
 The Christopher and Susan Martin Opera Fund
 The Margaret Clark Mercer Fund for Opera
 The Ralph E. Miller and Paul E. Cawein Fund for Opera
 The Steve Z. and Mary G. Mitchell Family Fund
 The Reverend Lloyd V. Moffett Opera Endowment Fund
 The Robert G. and Lillian Vitanza Ney Family Opera Fund
 The Joseph A. and Anne T. Prezio Opera Endowment Fund
 The Richards Family Opera Fund
 The Molly Rinehart Fund for Opera
 The Wadsworth Fund
 Charles Weaver and Family Fund for Opera
 Dr. Fred R. Whaley and Helen A. Whaley Fund for Opera
 The Robert and Virginia Young Opera Fund
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JOAN MISTROUGH AND JAMES PECK

Joan Mistrough and her husband James Peck recently made a planned gift to Chautauqua, choosing to allocate a significant sum in their wills to the Foundation's Unspecified Endowment Fund. The gift is one of several unspecified gifts received last year which boost Chautauqua's resilience in times of special need and provide essential resources toward new initiatives, creative collaborations, and ongoing operational expenses in future years.

Mistrough and Peck, who live in Metuchen, New Jersey, characterize themselves as "kind of nerdy." Seventeen years ago they began looking for a different sort of vacation that would exercise their minds while also providing rest and recreation. In his research, James discovered Chautauqua.

"We came for a week that first year, then two weeks the next year," Joan explained. "And then we started bringing friends to Chautauqua with us. We got a bigger apartment."

These days, Joan and James spend a lot of time outside on their porch reading and enjoying their view of the lake. James does the cooking. Both work out every day they are on the grounds. James and a buddy take long bike rides in the Chautauqua County countryside. Joan has cultivated an appreciation for chamber music, thanks to Chautauqua's special performances by visiting musicians. They take in the morning lectures and evening symphony concerts with their visiting friends. They also make a practice of sponsoring

students from the School of Music and continue to follow the blossoming careers of the young talents they have befriended. "We got invited to the wedding of one of our students recently," Joan said with pleasure.

While James and Joan are both retired, they keep a hand in activities that satisfy their desire to give back to the community where they live. James is the former vice president of client services for Wellsoft Corporation. Joan continues to provide financial coaching to individuals on a limited basis. Both are passionate about the YMCA in their region. She served on the board, and James now helps with maintenance at their local facility.

"We get a lot of satisfaction out of making a difference for people," Joan said. "We love Chautauqua and we're excited about the changes that are happening here in terms of diversity and inclusion of people of color and the incredible range of ages represented here. We feel the Institution has a great future ahead."

"Giving to infrastructure as we've done is not sexy," Joan added, "but it is integral to making Chautauqua work well. That's not to disparage restricted gifts. We trust the staff and volunteer leadership on the board to make decisions about how best to apply our gift. We are not wealthy people, but we know that whatever you give here makes a difference. We get so much from Chautauqua. Giving back means a lot to us."

CUMULATIVE SUPPORT TO ENDOWMENT

The following donors have contributed \$10,000 or more to the endowment of the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts received, pledged, transferred to the pooled life income fund and certain planned gift commitments made since May 1937.

New donors are denoted with orange and changes in giving levels are denoted with a purple dot.

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 Jay and Marilyn Richey
 Kathleen M. Riley
 Philip and Rachel Rogers
 William D. Rogers
 Stephanie R. Rosenblatt
 Daniel Rosenthal and Avery
 Sheffield
 Eithne Ross
 James and Maureen Rovegno
 Dr. David and Susan Rubin
 David Sachs and Linda
 Shackelford
 Ann Salsbury
 Ralph and Gretchen Sather
 Marilyn Scamman
 Amy B. Schiller
 Phyllis Schultz and Matt
 Gromet
 Helene J. Schwartz
 Elizabeth R. Scully
 Ms. Mary Seifert
 Nikki and Brian Selden
 Elaine and Allen Short
 Betty and Alan Siegel
 Gail and Peter Silberstein
 Joanne and Bert Simons
 Tom and Penny Small
 Dr. Robert G. and Katy T.
 Smith
 Jack and Barbara Sobel
 Joreta and Richard L. Speck
 Clyde Speer
 Evangeline McKnight Speer
 Marcia Steel
 Lois A. Steere
 Diane and Jeff Steinhilber
 Fund
 Joan Stevens
 Jana Stone
 Dan and Ann Sullivan
 Vern Swaback
 David and Irene Tabish
 Mr. Howard Talks and Ms.
 Carol Hall
 Mr. and Mrs. Frank E. Taplin, Jr.
 Sue and Gary Tebor
 Martha M. Teich
 Caroline Thompson and Steve
 Allen
 Brenda and Larry Thompson
 Harold and Jean Thurston
 Tiger Management L.L.C.
 Beatrice C. Treat
 Dorothy Trefts and Daniel J.
 McEvoy
 TRW, Inc.
 Dr. Carl A. and Mary L. Viehe
 Carol and Stephen Viehe
 Larry and Maria Wagner
 Kitty Baldrige Warman
 Kuniko Washio and William
 Scollard
 Dr. Nicholas A. and Carol N.
 Weil
 Florence Mina Miller Weiler
 Drs. Jennifer and Robert
 Weisenthal
 Bill and Betty Whitaker
 Elizabeth Ann Wick
 John B. Wilbur III and
 Margaret G. Wilbur
 Rachel Wilder and Phil Lerman
 Norma K. and Allan P. Wilson
 Jean Wilson
 Mrs. Lou Wineman
 Ann P. Winkelstein
 Meryl, Chuck, Andrew and Ian
 Witmer
 Mr. and Mrs. Howard Zemsky
 Burt and Sandi Zucker
 Philanthropic Fund



HAROLD F. REED JR.

Photo: Kristen Triplett

The late Harold F. Reed, Jr., who passed away last year, was a true Chautauquan. In a 2012 interview with the Chautauqua Foundation, he recalled the day in 1936 that President Franklin Roosevelt made a visit to the Institution to give a talk. Reed was 9 years old.

“I was standing on the bridge across the ravine behind the Amphitheater that day,” Reed recalled. “As the president’s limousine drove up to the Amp, I was overtop his car! The president gave his ‘I Hate War’ speech and people were so proud.”

Reed was a lifelong Chautauquan who served as a director of the Chautauqua Foundation from 1989 to 2001 and an Institution trustee from 1993 to 2001. As an attorney and thoughtful leader who was passionate about lifelong learning, Reed followed in the footsteps of his father, Harold F. Reed Sr., who chaired the Chautauqua Foundation for a decade, beginning in 1957. Reed Sr. helped Chautauqua build its endowment in the early years of the Foundation, topping \$1 million in 1958. He also served as a trustee of the Institution.

Reed Sr.—a native of Beaver, Pennsylvania—bought a cottage at 7 Foster which remained in the family throughout his son’s life. In 2007, Reed, Jr. and his wife of 62 years, Martha, made a planned gift to establish the Reed Family Scholarship for students in the School of Music. Earlier, to honor his parents, Reed had also established the Harold F. Reed, Sr. Chaplaincy, supporting clergy visiting the Institution.

“As a child, my father fell in love with Chautauqua, and it became a passion throughout his whole life,” said Reed’s eldest daughter, Jenifer, the third generation of Reeds on the grounds. Her mother Martha had also been familiar with Chautauqua before she met and married Harold through her sister and brother-in-law, who owned a home on the grounds.

“My mother, a life-long pianist, went to Mount Holyoke and was a singer in the women’s college vocal group, the V-8’s,” Jenifer added. “Her sister Mary was also a vocalist, as was

George, my dad’s only brother. Their generation participated in and adored the music programs at Chautauqua. My mother also had a great passion for the Massey Organ. Our parents naturally passed along this love of music to us.”

This year, after their father’s death in May 2020, the Reed siblings made the difficult decision to sell the family home at Chautauqua. “Losing dad just as the pandemic forced the cancellation of the season brought us all back to Chautauqua at different points this past year. I am glad dad did not have to experience that absence of the regular season.”

Harold Reed, Jr. left behind six grandchildren. “We all raised our children in Club, and my brother Pat’s daughter, Carey, followed in her grandfather’s footsteps as a Club counselor for a number of years,” Jenifer explained. “My sister Nancy and I both worked at the Athenaeum as servers when we were teenagers, and our brother Tom was a bellman at the hotel. Today our families are spread across the country, and we made the difficult but unified decision to let the cottage go.”

Jenifer studied in the Chautauqua drama program, worked in professional theater in her younger years, and later was a volunteer drama teacher. She lives in Minnesota. Her brother Pat resides with his family in Connecticut. Sister Nancy, an attorney, has retired to North Carolina, and their younger brother Tom is a business executive in Michigan.

It is a comfort to the Reed siblings to contemplate the legacy their parents created at Chautauqua through the generous Reed Family Scholarship. “It is such a beautiful marriage of their passions for education and music,” Jenifer said.

As Harold Reed, Jr. put it in the 2012 interview, “When I looked at the list of donors to Chautauqua this past year, I was very interested to find two of my children on the list. I don’t ever recall my father asking me to donate, and I didn’t ask my kids. It pleases me that they have the same love in their hearts that I have for Chautauqua. Philanthropy will always be essential to this place.”

OFFICERS, DIRECTORS AND STAFF

Directors

Term Expires

David W. Anderson of Hingham, Massachusetts • 2, 3, 5, 6 <i>Chair, Nominating & Governance Committee</i>	2023
Andrew L. Camden of Grosse Pointe, Michigan • 3, 5, 6 <i>Chair, Investment Committee</i>	2021
Charles S. Gamble of Dunedin, Florida • 1, 4, 5	2024
Karen J. Goodell of New York, New York • 2, 3, 6	2021
John Haughton of Buffalo, New York • 2, 4, 6	2022 ⁱ
Michael E. Hill of Washington, D.C. and Chautauqua, New York - <i>ex officio</i> • 2, 3, 4, 5	ii
Nancy Kyler of Staunton, VA • 1, 2, 7	2024 ⁱ
Craig Marthinsen of Toronto, Ontario • 1, 4, 5, 7	2022
Anne Odland of Washington, D.C. • 1, 3, 4 <i>Chair, Audit Committee</i>	2022
M. Timothy Renjilian of Atlanta, Georgia • 1, 2, 3, 4, 5, 6, 7 <i>Chair, Executive Committee</i> <i>Chair, Board of Directors</i>	2023
Anne Hoyt Scavone of New York, New York • 2, 6, 7	2022
Sheila Schroeder of San Francisco, California • 1, 3, 5, 6	2021
George T. Snyder of Pittsburgh, Pennsylvania • 1, 3, 4, 7 <i>Chair, Personnel Committee</i>	2021
Stephen J. Zenczak of Washington, D.C. • 1, 3, 4 <i>Chair, Finance Committee</i>	2023

Officers

M. Timothy Renjilian • Chair
 Karen J. Goodell • Vice Chair
 Stephen J. Zenczak • Treasurer
 Deborah E. Moore, CPA • Executive Director
 Theresa Frangione • Corporate Secretary

Staff

Jennifer L. Burgeson • Fund Accountant
 Theresa M. Frangione • Corporate Secretary and
 Executive Assistant to the Institution's Senior VP and
 Chief Advancement Officer
 Deborah E. Moore, CPA • Executive Director

- | | |
|-------------------------|------------------------------------------|
| 1 - Audit Committee | 5 - Investment Committee |
| 2 - Development Council | 6 - Nominating & Governance
Committee |
| 3 - Executive Committee | 7 - Personnel Committee |
| 4 - Finance Committee | |

ⁱ Coincides with term on the Chautauqua Institution's Board of Trustees
ⁱⁱ Coincides with term as President of Chautauqua Institution

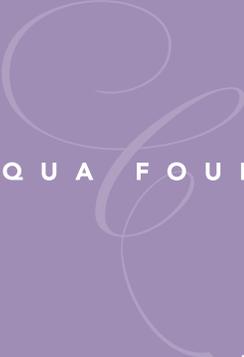
FORMER DIRECTORS

Former Directors and Terms of Service

Wilson C. Price • May 1937 to August 1962
Mrs. E.J. Bellinger • August 1937 to October 1963
Mrs. L. D. Boal • August 1937 to August 1955
Samuel M. Hazlett • August 1937 to July 1956
James H. Matthews • August 1937 to 1939
Walter Roberts • August 1937 to March 1959
David L. Starr • August 1937 to 1951
Mrs. Livingston Hunter • August 1939 to 1942
Mrs. Dorothy Smith • August 1943 to 1950
Walter F. Rittman • August 1950 to September 1954
Harold F. Reed • August 1951 to August 1971
Mrs. Walter F. Rittman • August 1955 to January 1964
Paul N. Anderson • August 1955 to August 1965
Walter C. Shaw, Jr. • August 1956 to August 1974
John D. Hamilton • July 1959 to August 1971
Samuel P. Price, Sr. • August 1962 to August 1995
Mrs. Dorothy W. Cook • August 1964 to August 1987
Lewis W. Morgan • August 1964 to August 1990
Nancy Miller Arnn • August 1965 to August 1989
Richard H. Miller • August 1971 to August 1996
J. Donald Patton • August 1971 to August 1984
Howard G. Gibbs • August 1974 to August 1990
Oscar E. Remick • September 1975 to December 1976
Robert S. Bargar • August 1976 to August 1994
Mrs. Mary B. McDowell • August 1976 to August 1982
John S. Rogers • August 1976 to August 1986
David H. Carnahan • August 1976 to January 2000
George L. Cornell • August 1976 to August 2001
Joseph A. Neubauer • August 1977 to November 1983
Robert R. Hesse • January 1978 to November 1983
Richard L. Bechtolt • August 1982 to July 2006
Daniel L. Bratton • December 1983 to December 2000
Edward P. Boyle • August 1984 to August 1994
Frank E. McElree, Jr. • August 1984 to August 1996
H. David Faust • August 1986 to June 1988
Mary Frances Cram • August 1987 to August 1993
Robert B. Osburn • August 1989 to August 1996
Harold F. Reed, Jr. • August 1989 to August 2001
Eugene S. Cohen • August 1990 to August 1998
George L. Follansbee, Jr. • August 1990 to March 2004
Hal A. Fausnaugh • April 1990 to August 1994
R. Quintus Anderson • April 1991 to August 1995
William F. Hill, II • April 1991 to August 2005
Patricia Goldman • August 1992 to August 2003
Marilyn G. Levinson • August 1992 to August 2000
William H. Park • August 1993 to August 2005
William R. Goodell • August 1994 to August 2019
James G. Groninger • August 1994 to August 2014
William G. Karslake • August 1994 to August 1995
Thomas R. Bromeley • August 1995 to June 2001
vic gelb • August 1995 to August 2011
Selina P. Johnson • August 1996 to August 2008
Wilfred R. Konneker • January 1996 to August 2006
Lowell K. Strohl • August 1996 to February 2010
Miriam S. Reading • January 1997 to August 2006
Susan Moran Murphy • August 1998 to August 2018
Martin Coyle • August 2000 to November 2003
Wendy Cohen • August 2001 to May 2011
Scott McVay • January 2001 to December 2003
Allen Short • August 2001 to August 2005
John S. Connolly, Jr. • August 2003 to August 2018
Fred C. Gregory • August 2004 to August 2008
Thomas M. Becker • January 2005 to December 2016
Christopher H. Lytle • February 2005 to August 2014
John W. Burden, III • August 2005 to October 2007
Kathryn J. Lincoln • August 2005 to December 2011
I. Hale Oliver • August 2005 to August 2013
George T. Snyder • August 2006 to August 2007
Lauren Rich Fine • August 2006 to August 2020
Steven W. Percy • August 2007 to August 2015
John A. Corry • January 2008 to August 2013
Charlotte A. Fowler • August 2008 to December 2012
John E. Anderson • August 2008 to August 2016
Gary M. Brost • May 2010 to August 2016
Thomas B. Hagen • June 2011 to August 2017
John S. Kobacker • August 2011 to September 2016
Laura P. Currie • June 2012 to August 2017
Cathy L. Bonner • August 2013 to August 2019
William James • August 2013 to August 2020
P. James Brady • August 2015 to August 2016
Georgia M. Court • August 2016 to October 2017
John A. Milos • August 2016 to August 2019
Richard Wade • August 2016 to August 2020

Former Board Leadership

Walter Roberts August 1937 to August 1957	John D. Hamilton August 1967 to August 1971	William F. Hill, II August 1996 to August 2002	Steven W. Percy August 2008 to August 2015
Harold F. Reed August 1957 to August 1967	Richard H. Miller August 1971 to August 1996	Lowell K. Strohl August 2002 to August 2008	Cathy L. Bonner August 2015 to August 2019



CHAUTAUQUA FOUNDATION

foundation.chq.org

P.O. Box 28, Chautauqua, NY 14722

2022 Annual Membership Meeting

Saturday, August 20 • 9 a.m.