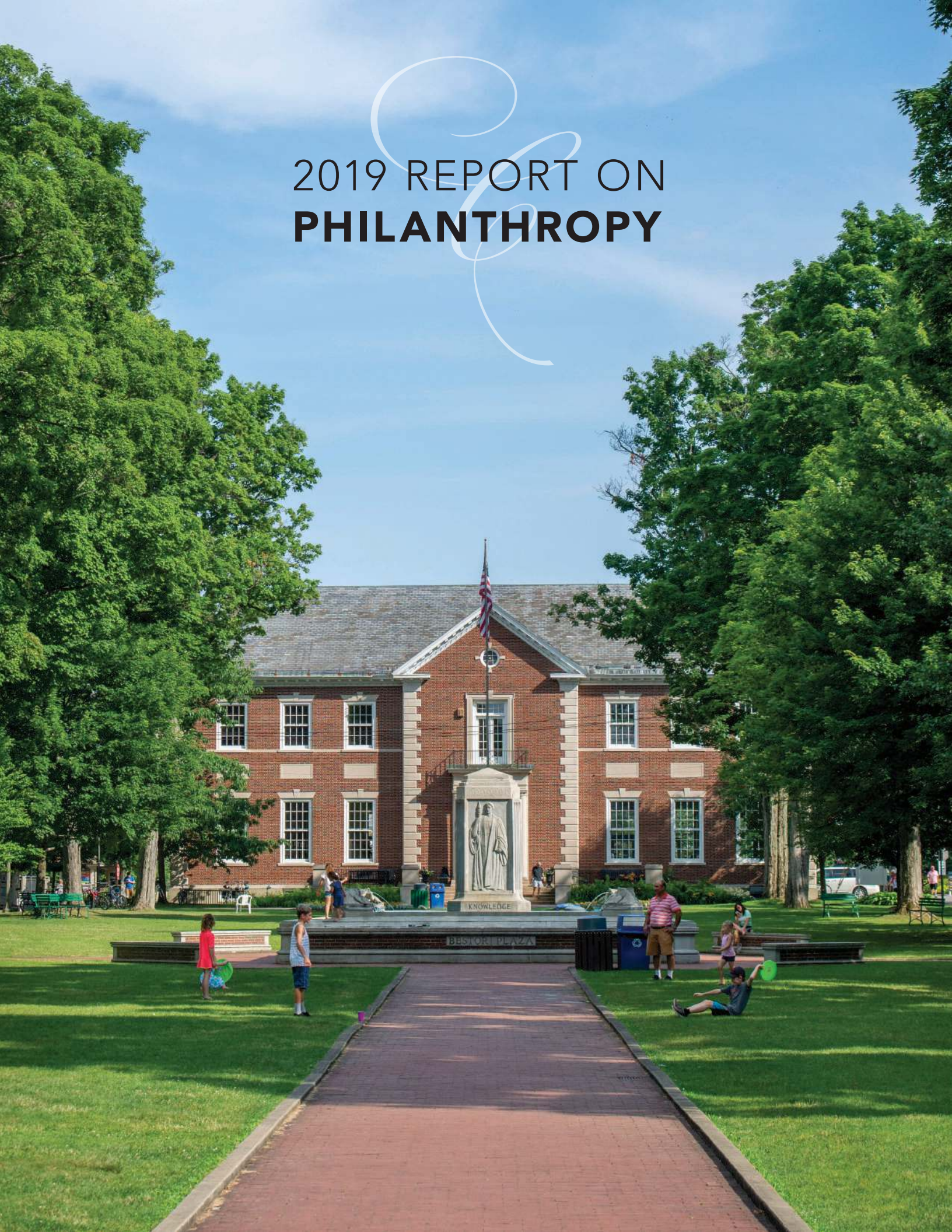


# 2019 REPORT ON **PHILANTHROPY**







Dear friends,

It was 12 months ago that Chautauqua's Board of Trustees and the administration were eagerly preparing to share with you and our community the Institution's recently adopted strategic plan, 150 Forward. Following 18 months of meetings, conversations, focus groups, analysis, assessments, surveys and

planning we were confident that this roadmap would offer a path for us to implement and evaluate objectives prioritized to optimize, expand, preserve and diversify key areas at the heart of our shared values.

We knew there were many challenges ahead for how we would assess and deploy new resources, structures and investments critical to addressing these objectives. After a summer of sharing this plan in a series of town hall sessions — coupled with public forums on campus master planning and inclusion, diversity, equity and accessibility — the months following were intensely focused on advancing progress in implementation, more deeply involving staff in this important work and developing plans for how we would achieve each defined measure of success.

In the midst of great momentum and our path growing ever clearer, we were also reorganizing our development operations to move the Chautauqua Foundation's fiscal year to a calendar cycle aligned with the Institution and shifting most Foundation staff and operations to the Institution's Office of Advancement at the same time.

As former Foundation Board Chair Cathy Bonner wrote last summer, "Managing change is at the heart of leadership." This has been a time of great change... yet none of us could have imagined the events of recent months as our society has confronted global pandemic, loss, fear, social unrest, racial injustice and a

host of macro and micro ripple effects of these events on each of our daily lives, on our health and our mental and spiritual well-being. It is nothing that any leader can prepare for.

I am deeply grateful to you, Chautauqua's supporters, for being our bright light through a dark time. Your generosity, advocacy, public and private support to my colleagues and me fill me with hope for this Institution and our ability to persevere. And without diminishing the many important issues and causes that deserve our attention, I believe Chautauqua's mission is more important than ever. We are being called to do more and to do better, and we find ourselves quickly pivoting to accelerate a strategic plan that could not have come at a more needed time.

The cross-cutting imperatives of that plan — Strategic Partnerships, Mobilization of Technology, Labor and Talent Solutions, and Inclusion, Diversity, Equity and Accessibility (IDEA) — are critical to our ability to amplify new and diverse voices and ideas, they are being tackled head on as we become more nimble in managing a distributed workforce, to how we are working in collaboration with organizations that share Chautauqua's values and expand our reach, as well as driving our investment in and launching of an online CHQ Assembly this summer.

I know many of you will be unable to return to Chautauqua this summer, but I invite you to join us for a grand experiment this season as we convene remotely and in new ways. There are important conversations to be had and it won't be the same without you.

Thank you again for your investment, without which none of this would be possible. I hope you'll permit us the opportunity in the pages to follow to celebrate and thank you. When the weight of the world seems to be on our shoulders, take a moment with this publication to be reminded of something that means so much to so many — and recall some of the Chautauqua moments you hold in your heart. May they keep you safe and whole until we are reunited.

Sincerely,

*Michael E. Hill*

Michael E. Hill,  
President, Chautauqua Institution



## CHAUTAUQUA INSTITUTION MISSION STATEMENT

Chautauqua Institution is dedicated to the exploration of the best in human values and the enrichment of life through a program that explores the important religious, social, and political issues of our times; stimulates provocative, thoughtful involvement of individuals and families in creative response to such issues; and promotes excellence and creativity in the appreciation, performance, and teaching of the arts.



## 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.

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## #MyCHQMoment

This spring, we asked Chautauquans, "What moments have defined your Chautauqua experience?" Seeing so many of you enthusiastically respond by submitting photos (enjoy a sampling shown here), a short video or story on social media was heartwarming as we dream about the day we will be able to assemble in person again. From big moments to quiet ones, we invite you to reflect on the moments that connect us to this special place and to one another as we look forward to creating new moments and memories to last a lifetime.



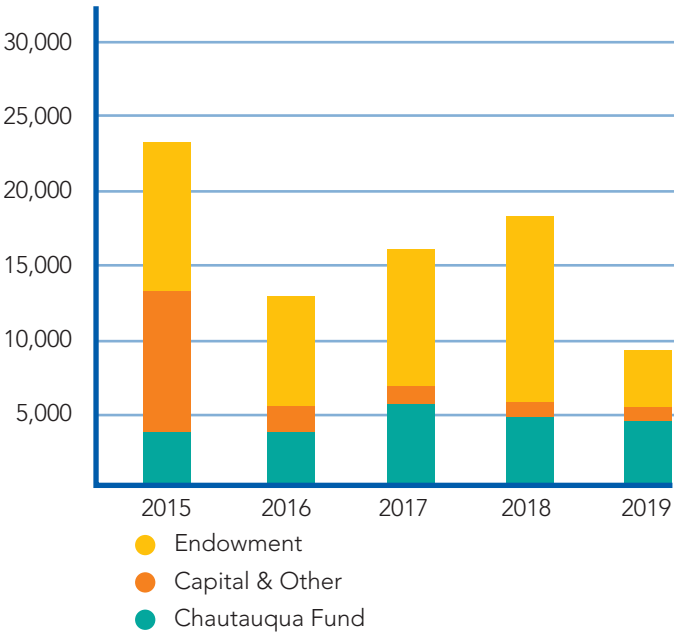
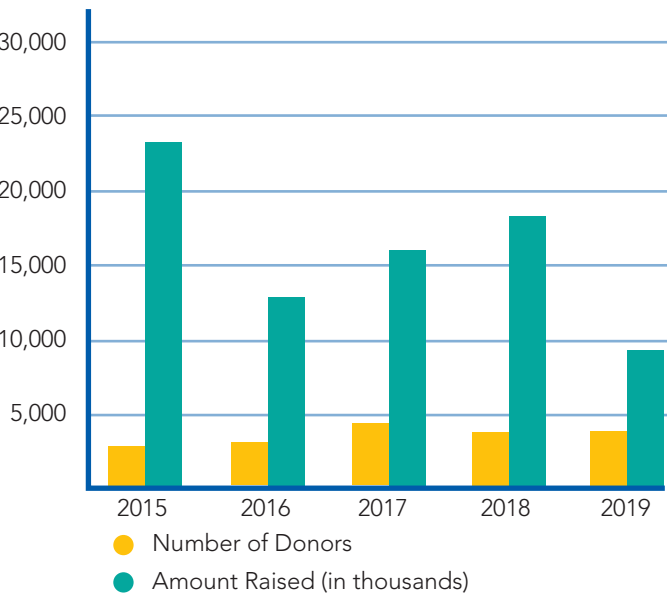
# FUNDRAISING REPORT

## Total Philanthropic Activity

In 2019, Chautauquans generously supported the Institution's mission with over \$9.3 million in total philanthropy, which includes pledges, outright gifts and planned gifts.

The information has been restated from the Foundation's fiscal year ended March 31 to calendar year information ending on December 31 and includes shifting other special gifts into the Chautauqua Fund for 2018 and 2019.

Calendar Year	Chautauqua Fund	Endowment	Capital & Other	Total
2019	\$ 4,562,551	3,893,426	889,722	9,345,699
2018	4,786,953	12,477,053	985,221	18,249,228
2017	5,696,084	9,154,967	1,173,107	16,024,158
2016	3,859,801	7,322,221	1,711,904	12,893,927
2015	3,782,541	10,036,379	9,399,876	23,218,796



Generous philanthropy takes many forms at Chautauqua, and is unique to each person inspired to give. There are three categories of giving, including contributions to the annual Chautauqua Fund, endowment, and capital & other projects.

### Chautauqua Fund

All gifts to the Chautauqua Fund — prior to January 1, 2020 — were made to the Chautauqua Foundation and transferred to the Institution to be used in its annual operating budget to support the full range of programming Chautauqua offers.

Currently, these gifts are now received directly by the Institution for this purpose.

Donors who contributed to the 2019 Chautauqua Fund are recognized on pages 19-34.

### Endowment

All gifts to endowment are made to the Foundation for investment and then made available to the Institution according to the spending policy established by the board of directors of the Foundation.

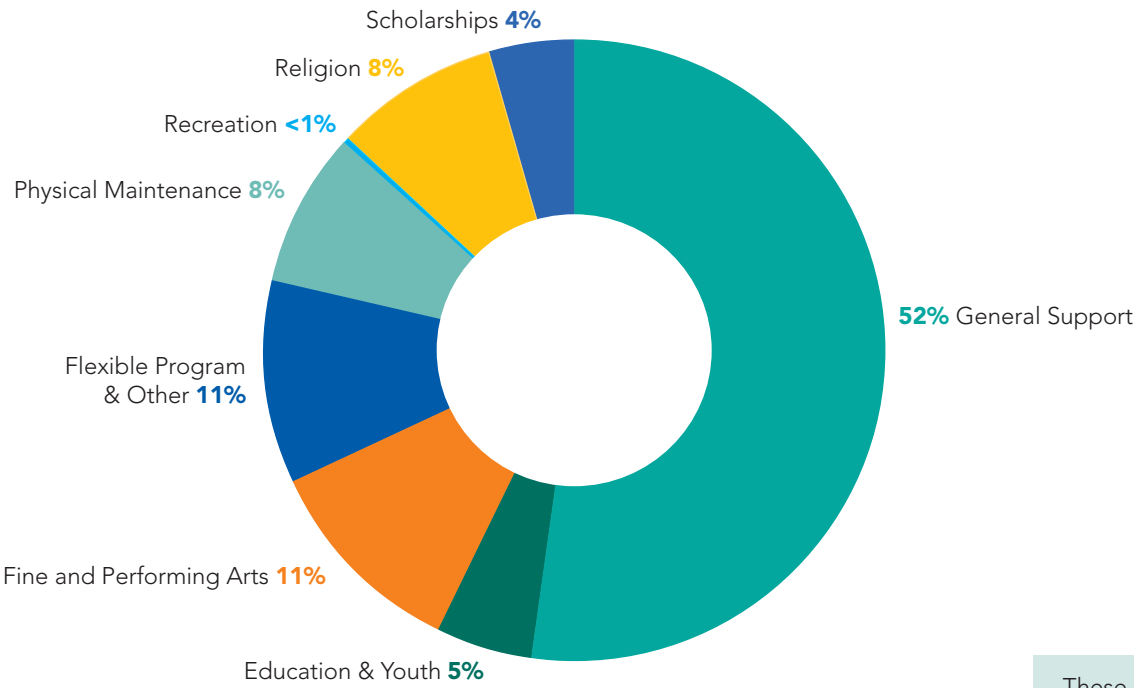
Donors who made endowment gifts in the calendar year 2019 are recognized on pages 38-40.

### Capital & Other

All gifts to capital projects and other special gifts are made directly to the Institution and reported accordingly in its audited financial statements. They primarily support the renovation or construction of facilities and also supplement the operating budget for extraordinary program initiatives.

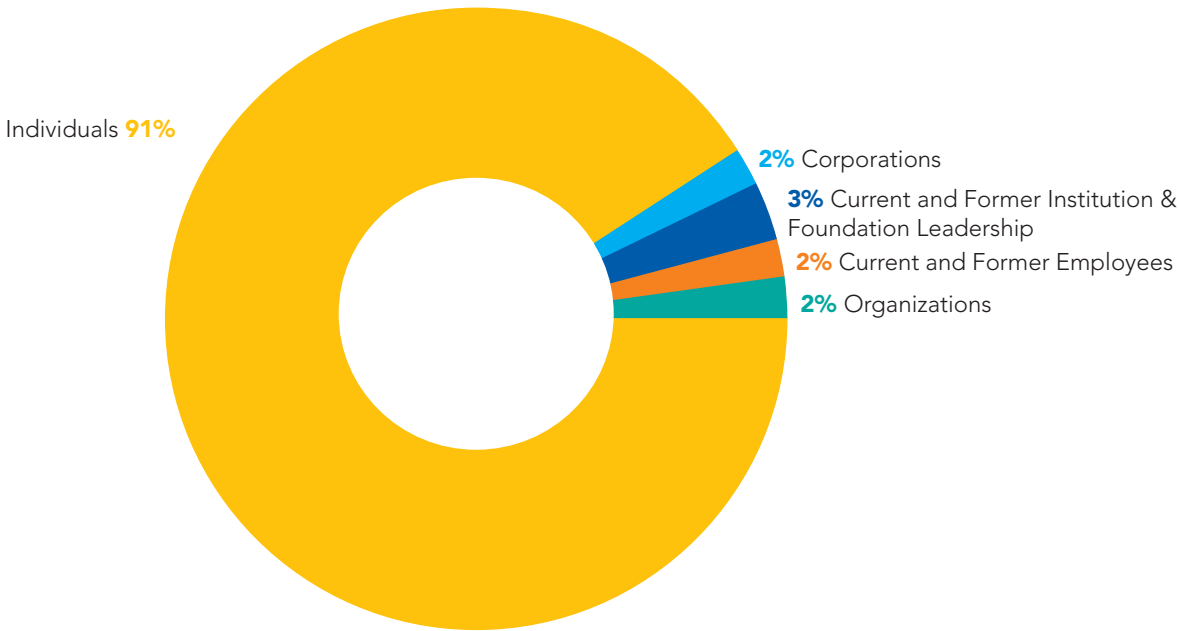
Donors who made capital or special gifts in 2019 are recognized on page 44.

## Total Giving by Area of Support



These charts represent total philanthropy of \$9.3 million for the calendar year ended December 31, 2019 by area and type of support.

## Who Supports Chautauqua?









# LIFETIME GIVING

Numerous individuals and organizations have demonstrated their commitment to Chautauqua through extraordinary expressions of philanthropy. This lifetime giving list recognizes and thanks the cumulative generosity of donors to the annual Chautauqua Fund, capital projects, endowment or who have pledged or transferred, assets as part of certain planned gift commitments, a cumulative amount of \$250,000 or more.

Donors new to this list are highlighted in teal.

**Greater than \$5,000,000**

Susan and Thomas Hagen  
Mary and Oliver Langenberg  
Joan and David Lincoln  
Patty and Spencer Van Kirk, III

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Elaine and Richard Rieser  
Mr. and Mrs. Richard K. Smucker  
Lowell and Rebecca Strohl and Family

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Mrs. Robert D. Campbell  
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Dr. and Mrs. R. William Cornell  
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The Turney Family  
Caroline Van Kirk Bissell  
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Chautauqua Dance Circle  
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Mr. and Mrs. Howard Zemsky  
Shirley and Sam Zemsky  
Steve Zenczak and Pat Feighan





# 2019 PHILANTHROPY AT CHAUTAUQUA

The following list recognizes with profound gratitude the collective giving of all donors who made a contribution of \$5,000+ to one or more philanthropic area in the calendar year 2019.

**Greater than \$500,000**  
Thomas B. Hagen

**\$250,000–\$499,999**  
John T. Bailey  
The Hultquist Foundation, Inc.  
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Mr. and Mrs. Richard K. Smucker

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Joanna and Kenneth Nilsen  
+ Anne and Steve Odland  
Sydelle Sonkin and Herb Siegel  
Helen Truman Trust

**\$50,000–\$99,999**  
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Chautauqua Women's Club, Inc.  
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Ted and Deborah First  
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Norton Philanthropic Trust



(+) indicates those who have maximized the impact of their generosity through a corporate matching gift

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DICK & BETH GUNNELL

Dick Gunnell once heard a Chautauqua lecturer ask those assembled to consider, “If you had to pick one word in terms of how you can best live your life, a good word would be gratitude.” It was a moment that stayed with him and that one word — gratitude — was not only internalized but has been acted upon in many moments since.

Reintroduced to Chautauqua as adults, Dick and his wife, Beth, describe their story as “similar to so many others.” Having both grown up in Buffalo area, they made Sunday day trips or spent the occasional week renting a cottage on the lake in their youth. After marrying, they moved around the country before settling in Connecticut with their young children. Following a solo trip Beth made to visit her mother, the women decided on a whim to make the drive to Chautauqua. “As soon as I walked in the Main Gate, after so many years,” Beth said, “I knew this was the place for our kids.” Shorter trips in the years since — often bouncing from rental to rental — lengthened and ultimately the Gunnells decided to purchase property.

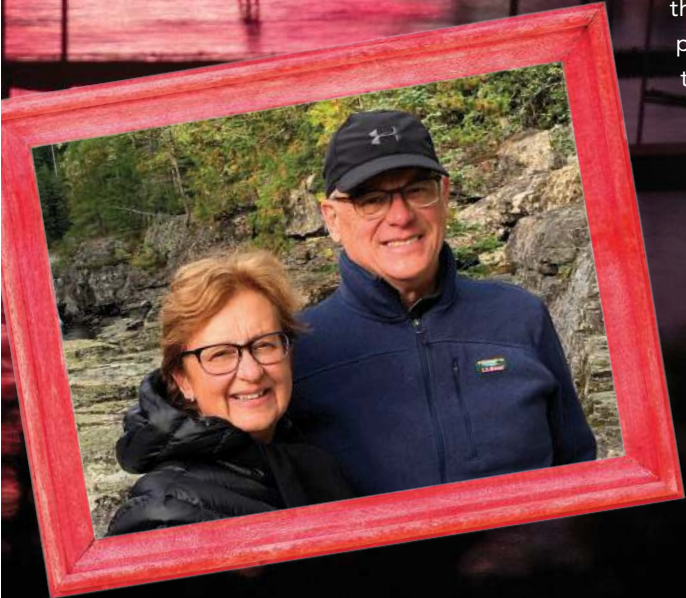
Beth returned to singing in the Motet Choir and Dick, when not working, attended many of the lectures. Their children, now grown, made lifelong friends and worked as Boys’ and Girls’ Club counselors and at the Y.A.C. Dick attributed these years as helping positively influence the way their children live their lives, noting with pride during this difficult time of pandemic that both daughters are nurses.

Dick and Beth believe strongly in the values held among members of the Chautauqua community, values that inspired their generous gift of unrestricted annual support as new members of the Bestor Society. “It’s important to me what Chautauqua has done for my own soul, for my family, and for others this place touches,” Dick said. “I’m convinced Chautauqua will use our money well and do good things with it. It will help influence communities in other parts of the world — and other neighborhoods wherever else we live — in positive ways that the world needs more of.”

Describing a combination of gratitude and shared values as forming the backdrop of their support, the Gunnells have enjoyed more time together at Chautauqua with family and friends following Dick’s retirement last year. They also appreciate the broader experience of community they have discovered. “The people you meet here,” Beth reflected, “you talk about what you saw, you talk about ideas, you talk about how we can make the world a better place.”

Dick echoed it is a strong community of those willing to step up and also those “behind the scenes who make Chautauqua such a marvelous place... people who make this place function, and grow, and get healthier and do the good work it does. That includes the people on the grounds and the people out in the community, as well, who support the Institution and make it as good as it can possibly be. I want those people to know I have gratitude for them.”

Though the Gunnells often find themselves busy while at Chautauqua, Beth noted, “This is not a doing place — though there is a ton to do — this is a ‘being’ place. And if you believe that you’ll be really happy here. It’s more about who you are and who you connect with rather than what you do. You’re so busy here you’re doing, doing, doing, but it’s not about that — it’s about those moments and connections you make here that you can’t recreate; Chautauqua moments are everywhere.... When people come to visit us, I tell them to look for their ‘Chautauqua moment’ because it will happen.”







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# STACEY SCHLOSSER

Stacey Schlosser is a jack of all trades. A successful business owner (she operates a “make your own” fused glass studio), the president of her New Jersey synagogue, a volunteer with various civic organizations, and the mother of two grown children, Stacey lives a fast-paced life.

When she returns to Chautauqua each summer — which she first visited 25 years ago — Stacey fills her days with a bevy of activities. Yet amidst attending lectures, playing softball, taking mah jongg classes and going to Shabbat at the bell tower, she describes this annual pilgrimage as time when she can “slow down.”

While enjoying her family’s exposure to a range of activities and the freedom it afforded her children during their formative years, Stacey particularly values the sense of community that exists at Chautauqua like nowhere else. It’s a place where she is able to strike up a friendly conversation with a stranger, where people walking by exchange pleasantries, and where there is a sense of shared identity because of a similarly held belief in the value of this unique community.

By making a legacy gift, Stacey recently joined the Eleanor B. Daugherty Society. She wanted to include Chautauqua in her will because she “knows how hard it is for nonprofits to survive” in changing times. Stacey felt inspired to make a gift for unspecified endowment because she loves Chautauqua’s intersections of casual access to the arts, the inclusion of various faith traditions, the safe environment for children, and especially the sense of home and belonging it provides. She is deeply invested in preserving Chautauqua for generations to come, especially when people have so many choices for travel and families may be less rooted to place than in the past.

With several obligations to other causes she cares about and while planning for retirement, Stacey wanted to support Chautauqua in a way that is both meaningful and manageable. For her, a legacy gift is how she can sustain a place she loves “by making a promise to its future.”



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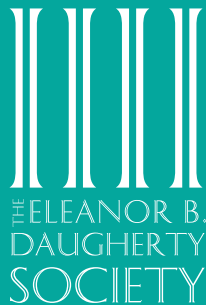


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# CHQ ASSEMBLY TECHNOLOGY

Recent months have reminded us, “The only constant in life is change.” While quoting Greek philosophers can feel trite, this saying has endured because it’s true. People, organizations, countries (and yes, even Chautauqua) struggle with change. It’s not because there isn’t recognition of the ubiquity of change but rather we struggle because of the wrestling that comes with change.... Are we ready for change? How can we harness it for good? Will we experience change, create change, or perhaps be changed?

At Chautauqua, there is community pride in cherishing our shared traditions, offering continuity and the comfort of familiarity for individuals and families in the midst of a changing world. Visitors have often described that moment of walking down the brick path for the first time as analogous to breathing a sigh of relief. And yet — even here — much has changed.

For the first time since its founding, Chautauqua Institution will not convene an in-person assembly due to pandemic. Some in our community, sadly, have been personally and deeply affected by this global health crisis. Many also are experiencing a sense of loss for the cancellation of the Chautauqua season as it has been known.

Instead of Chautauqua being “paused” during these uncertain times, the Institution’s leadership wrestled with how to approach this summer’s changed circumstances. CHQ Assembly — an online expression of the Institution’s mission — is an exciting new way to safely convene that honors both tradition and advances strategic goals to expand Chautauqua’s reach beyond the grounds. The board of trustees authorized considerable investments in additional equipment and specialized seasonal staffing to see it through.

On an accelerated timeline, the 2020 season was rebuilt with a combination of creative learning, collaboration and grit. None of it would have been possible, however, without significant philanthropy by generous Chautauquans who supported the project. Recent investments in capital projects — and faith on the part of our donors in the Institution’s ability to deliver on this new platform for digital content — enabled Chautauqua to adapt technology in unexpected ways.

In 2019, Bart Richards wanted to honor his family’s history at the Institution by contributing to upgrades in Norton Hall intended to improve audio equipment and visual projection for opera performances, and enhance simulcasting abilities for increased use of the facility. Now, his generous gift is the virtual backbone of what Chautauqua is putting online this summer — providing cameras, recording and video simulcast capabilities. One piece of technology in particular — a TriCaster — is the hub of video production and will enable streaming of content to CHQ Assembly by merging broadcast video, graphics and presentations.

A recent gift from Wendy and Ed Cohen made possible the purchase of a server that enables production teams to upload files from different locations and link the various buildings that generate content while crews operate at safe distances. Two years ago, Peter Georgescu made a capital gift for video podcasting equipment that will also be used this summer to record events and host live Q-and-A. The capabilities were intended for one purpose, but his investment will power the mixing and editing of video with audio feeds.

Thanks to these acts of generosity, the Institution had the support necessary to quickly and creatively adapt, to embrace change, and to ensure our long history of treasured traditions and the delivery of stimulating content — though in online venues — continue in 2020 and for the next 147 years.

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