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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.

MISSION STATEMENT

Adopted by the Chautauqua Foundation Board of Directors August 13, 1992.

Chautauqua Foundation, Inc., is the principal organization responsible for the philanthropic funding of the Chautauqua Institution. In this role it will:

Develop and maintain programs, products and vehicles appropriate to the philanthropic needs of the Institution as determined by the Board of Trustees and the Administration.

Assure fiduciary care in the investment, custody and administration of funds raised.

Disburse funds to the Chautauqua Institution in compliance with the Chautauqua Foundation Articles of Incorporation and the requirements imposed by donors.

Develop and maintain a competent and active Board of Directors and other volunteers as appropriate.

Develop, maintain and direct a professional staff appropriate to carry out the above responsibilities.

In the discharge of its responsibilities, the Chautauqua Foundation will be guided by the Chautauqua Challenge as adopted by the Board of Trustees. The Foundation will be dedicated to quality and integrity in all of its internal and external relationships. The Foundation will anticipate and accept change while maintaining an understanding and appreciation of the history of the Chautauqua Institution in general and the Foundation in particular.
During this past fiscal year, we celebrated the 75th anniversary of the establishment of the Foundation. This organization was created in an environment of hardship if not crisis. As the Chautauqua Institution emerged from receivership at the end of 1936, a cadre of leaders who remained committed to its ideals, despite the challenges of the Depression and debt, organized the Foundation to sustain those ideals and to hold philanthropic resources to invest in the furtherance of them.

Leadership is about those who step forward when others do not, both in times of challenge and struggle and times of great opportunity, to move an organization and its mission to a new and better place. Those who established the Foundation provided such leadership as have others during the seventy-five years of the Foundation’s existence.

Under the leadership of Richard Miller who served as President of the Foundation for 26 years, the Foundation became an active partner with the Institution to develop philanthropic resources, not only for endowment to be held by the Foundation, but to expand the Chautauqua Fund and renovate and build new facilities. During Dick’s time as President, the Foundation became responsible for all fundraising for the Institution and became the employer of a staff to carry out these responsibilities. Because of Dick, Chautauqua recognized the unfulfilled opportunity caused by its failure to invest seriously in fund raising. His vision and leadership spurred the philanthropic program which has resulted in the Chautauqua that we experience today.

Of course leadership shows itself in many ways. As the Foundation has expanded its responsibilities and Chautauqua has undertaken a series of comprehensive campaigns—which have resulted in well over a $100 million of philanthropic activity since 1991—many individuals have stepped forward as volunteers and with generous gifts that have propelled Chautauqua forward.

This past fiscal year, Oliver Langenberg demonstrated again for the community the opportunity for leadership. Oliver was a man fascinated by ideas and the opportunity to explore and discuss topics with which he was familiar or not. Chautauqua was a perfect match. Because he never retired, despite living to 99, Oliver’s time at Chautauqua over the past thirty summers was brief each year. As someone deeply invested in the St. Louis community, he was well aware of the impact of philanthropy upon places such as Chautauqua. In fact, during his lifetime, he and his wife Mary created the Foundation’s largest specified fund in support of the morning lecture program. This year the Foundation received the largest bequest in its history from Oliver.

Several of us associated with the Foundation knew Oliver quite well though his bequest was a surprise to us. We did not know Gail Olson, who also died during this past year. Gail’s bequest was even more surprising because she had not been a donor to Chautauqua during her lifetime. She, like Oliver, spent only a week or two at the Institution each summer. Gail was a music teacher in Rochester, NY and during her later years when more distant travel became impossible she discovered Chautauqua. Her love of books and music made Chautauqua a perfect match for her also. Recently, the executor of Gail’s estate informed us that Chautauqua was the residuary beneficiary of her estate and would receive in excess of $300,000.

Gail and Oliver are just two examples of the leadership that is driving Chautauqua forward. Robust bequest activity remains the most proven and successful means of building endowments that facilitate institutional advancement.

Char Fowler, Hale Oliver and John Corry have given generously of time to the Foundation during their combined 19 years as Directors. Their tenure on our Board has either ended since last year’s annual meeting or will be ending with the election of new Directors at the annual meeting this month. Our Board requires attention, due diligence and a strong devotion to our mission. These individuals have given this and more. We thank them for their service.

To all of you who lead at Chautauqua through the generosity of your investment in the Chautauqua Fund, in our endowment and for the exciting capital upgrades that have occurred, we are grateful. Thank you for your demonstration of commitment to the ideals and greatness of Chautauqua.

Sincerely,

Steven W. Percy, Chairman
Geof Follansbee, Chief Executive Officer
The Foundation’s net assets were $75.3 million at the close of its fiscal year ended March 31, 2013, $11.4 million higher than reported at the beginning of the fiscal year. The total value of the endowment, including both permanently restricted and temporarily restricted gifts, as of March 31, 2013 was $68.2 million and there were 671 active endowment funds. The vast majority of these funds are permanent endowments created to provide financial support for a specified purpose or to provide general support to the Institution. The remaining funds are funds whose principal may be expended but that the Foundation invests as part of the permanent endowment portfolio.

Endowment Assets by Area of Support

This chart represents the net asset balances of active endowment funds as of March 31, 2013 by area of support.

Total Philanthropic Activity

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Chautauqua Fund</th>
<th>Endowment</th>
<th>Capital &amp; Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>3,514,364</td>
<td>$12,054,029</td>
<td>$2,469,254</td>
<td>$18,037,647</td>
</tr>
<tr>
<td>2012</td>
<td>3,566,002</td>
<td>4,702,872</td>
<td>2,241,781</td>
<td>10,510,655</td>
</tr>
<tr>
<td>2011</td>
<td>3,275,022</td>
<td>4,768,036</td>
<td>2,997,530</td>
<td>11,040,588</td>
</tr>
<tr>
<td>2010</td>
<td>3,111,734</td>
<td>2,582,582</td>
<td>3,139,224</td>
<td>8,833,540</td>
</tr>
<tr>
<td>2009</td>
<td>2,894,449</td>
<td>759,940</td>
<td>1,339,609</td>
<td>4,993,998</td>
</tr>
</tbody>
</table>

Total philanthropy includes new cash gifts, new pledges recorded, and new planned gifts. It consists of 3 categories of giving; (1) Chautauqua Fund, (2) endowment, and (3) capital and other. The capital and other gifts are made directly to the Institution, primarily supporting the renovation or construction of facilities and also supplementing the operating budget for extraordinary program initiatives. Gifts to the endowment are made to the Foundation and then transferred to the Institution according to the spending policy for the permanent endowment and the terms of the gift. All of the gifts to the Chautauqua Fund are transferred to the Institution. Annual gifts to the Chautauqua Fund are used in the operating budget of the Institution to support the full range of programming Chautauqua offers. While the Foundation’s reporting is based on its fiscal year, the Chautauqua Fund operates on a calendar year. During the 2012 calendar year, the Fund raised $3,523,872. 87% of this amount was from the Bestor Society and 1874 Society members. The success of the Fund depends upon nearly 150 volunteers who solicit gifts from Chautauquans, patrons, and community residents. The costs of the fundraising efforts performed by the Foundation on behalf of the Institution are reported in the Foundation’s audited financial statements. The five year average of such costs was 10.3% of the amount raised for the fiscal year ended March 31, 2013.
Total Philanthropic Activity

The charts on this page represent total philanthropic activity for the most recent five years, which includes new cash gifts, new planned gifts, and pledges recorded during the fiscal year (in thousands). The chart below shows gifts by area of support, totaling $18,037,647 for fiscal year 2013.

Gifts by Area of Support

- **58%** General Support
- **13%** Capital & Other
- **3%** Fine and Performing Arts
- **10%** Education & Youth
- **2%** Flexible Program & Other
- **3%** Physical Maintenance
- **7%** Religion
- **4%** Scholarships
Endowment Contributions Receivable

New pledges and planned gift intentions, when combined with the previously stated intentions of donors, create a pool of future assets in excess of $42 million as of March 31, 2013. These assets grew by $4.5 million during the fiscal year. The discounted value of unconditional contributions receivable recorded in the financial statements was $8 million as of March 31, 2013. Conditional contributions receivable are not recorded until such time as the conditions are substantially met. The Eleanor B. Daugherty Society recognizes donors during their lifetime who have chosen to support Chautauqua’s mission through a planned gift. Participants are listed on pages 42 and 43.

The chart above depicts gross endowment contributions receivable in thousands.
Support to the Institution
The Foundation’s spending includes direct and indirect support to the Institution, administrative costs of running the Foundation, and investment management fees. Indirect support represents the costs incurred by the Foundation in providing development services on behalf of the Institution. Direct support from the endowment represents distributions to the Institution toward the operating budget for both specified and unspecified purposes. The amount to be distributed from the endowment is determined annually by taking the prior year distribution and increasing it for inflation and new gifts. The amount to be distributed from temporarily restricted funds is a minimum of $10,000 per year from the term funds with a final distribution equal to the appreciation of the fund, as well as additional amounts as designated for special projects.

<table>
<thead>
<tr>
<th>Direct Support to the Institution:</th>
<th>fiscal year 3/31/13</th>
<th>fiscal year 3/31/12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support from Endowment</td>
<td>$1,476,843</td>
<td>$1,238,524</td>
</tr>
<tr>
<td>Support from Temporarily Restricted Funds</td>
<td>126,876</td>
<td>168,292</td>
</tr>
<tr>
<td>Annual Support from the Chautauqua Fund</td>
<td>3,514,364</td>
<td>3,566,002</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$5,118,083</strong></td>
<td><strong>$4,972,818</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indirect Support to the Institution:</th>
<th>fiscal year 3/31/13</th>
<th>fiscal year 3/31/12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Expense</td>
<td>$1,123,310</td>
<td>$1,144,698</td>
</tr>
<tr>
<td>Reimbursement by the Institution</td>
<td>(350,000)</td>
<td>(200,000)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$773,310</strong></td>
<td><strong>$944,698</strong></td>
</tr>
</tbody>
</table>

General and Administrative Investment Management Fees
- $308,875 $334,904
- $315,843 $288,905

Investment Summary
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. The Committee’s oversight responsibilities cover $72.7 million in invested assets, comprised of the following portfolios:

1) Endowment ($66.9 million)
2) Temporarily restricted ($1.3 million)
3) Pooled life income fund ($3.7 million)
4) Custodial ($3.8 million)

Each portfolio is managed according to its specific objectives, and has a unique asset allocation appropriate to those objectives.

Hirtle, Callaghan & Co., LLC serves as the Foundation’s Chief Investment Advisor and actively manages the majority of the endowment portfolio, the temporarily restricted funds, and the custodial funds. The remaining portion of the endowment fund is invested in two hedge funds, Blackstone Alternative Asset Management and Pointer Management, LLC. The pooled life income fund was managed by JP Morgan Private Bank. During fiscal year 2014, Key Private Bank became the new trustee of the pooled life income fund.

1) 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. Hirtle, Callaghan & Co., LLC manages $53.9 million of the endowment and $13 million of the endowment is invested in the two hedge funds. The endowment’s net return for fiscal year 2013 was 8.8%.

2) Temporarily restricted funds are held and managed separately from permanently restricted endowment in one of two portfolios, employing very conservative investment strategies. Return on these assets was 2.8% and 0% for fiscal year 2013.

3) The management and investment strategy of the pooled life income fund (PLIF) is reviewed annually with former trustee JP Morgan Private Bank. At March 31, 2013, total PLIF assets were $3.7 million, invested 35% equity, 62% fixed income, 3% alternative assets.

4) Funds held in custody for the Institution to meet the debt service for the Turner Community Center had a market value of $757,209 as of March 31, 2013. Asset allocation was changed during fiscal year 2013 from 51/49 equity/fixed income to a series of certificates of deposits.

Investment performance is presented on a net basis, defined as total time weighted return after all investment management fees.
Endowment Asset Allocation 2013

Total endowment market value as of March 31, 2013 and 2012 was $66.9 million and $56.2 million, respectively. As of March 31, 2013 the portfolio was 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 Foundation has produced excellent long-term investment returns. Over the ten-year period ending March 31, 2013, the Endowment earned an annualized 8.4% return, net of fees, surpassing the annual results of the diversified benchmark, 7.8%. This benchmark is net of fee 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.

<table>
<thead>
<tr>
<th>Annualized Returns through March 31, 2013</th>
<th>3 Year</th>
<th>5 Year</th>
<th>10 Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Return</td>
<td>8.0%</td>
<td>3.5%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Benchmark</td>
<td>6.6%</td>
<td>2.4%</td>
<td>7.8%</td>
</tr>
</tbody>
</table>
The Board of Directors
Chautauqua Foundation, Inc.

We have audited the accompanying statements of financial position of Chautauqua Foundation, Inc. (the Foundation) as of March 31, 2013 and 2012, and the related statements of activities and cash flows for the years then ended.

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 March 31, 2013 and 2012 and the changes in its net assets and cash flows for the years then ended, in conformity with accounting principles generally accepted in the United States of America.

June 17, 2013
# STATEMENTS OF FINANCIAL POSITION

**March 31,**

**Assets:**

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$556,594</td>
<td>$838,795</td>
</tr>
<tr>
<td>Contributions receivable (Note 2)</td>
<td>8,040,538</td>
<td>6,810,862</td>
</tr>
<tr>
<td>Investments (Note 3)</td>
<td>69,201,601</td>
<td>58,938,071</td>
</tr>
<tr>
<td>Property and equipment, net (Note 4)</td>
<td>59,690</td>
<td>72,181</td>
</tr>
<tr>
<td>Other assets, net</td>
<td>358,271</td>
<td>267,283</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>$78,216,694</strong></td>
<td><strong>$66,927,192</strong></td>
</tr>
</tbody>
</table>

**Liabilities and Net Assets:**

**Liabilities:**

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payable to the Institution for program support (Note 5)</td>
<td>$1,957,423</td>
<td>$1,791,431</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>232,658</td>
<td>238,487</td>
</tr>
<tr>
<td>Amounts held in custody for others (Note 6)</td>
<td>757,209</td>
<td>988,212</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>2,947,290</strong></td>
<td><strong>3,018,130</strong></td>
</tr>
</tbody>
</table>

**Net Assets (Note 7):**

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>(806,396)</td>
<td>(1,244,674)</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>11,884,120</td>
<td>9,685,699</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>64,191,680</td>
<td>55,468,037</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>75,269,404</strong></td>
<td><strong>63,909,062</strong></td>
</tr>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$78,216,694</strong></td>
<td><strong>$66,927,192</strong></td>
</tr>
</tbody>
</table>

See accompanying notes.
### For the year ended March 31, 2013

#### Revenues and gains:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contributions:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash received:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>$</td>
<td>$ 3,514,364</td>
<td>$</td>
<td>$ 3,514,364</td>
</tr>
<tr>
<td>Endowment</td>
<td>-</td>
<td>157,268</td>
<td>7,491,786</td>
<td>7,649,054</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>-</td>
<td>22,334</td>
<td>1,231,857</td>
<td>1,254,191</td>
</tr>
<tr>
<td><strong>Total contributions</strong></td>
<td>-</td>
<td>3,693,966</td>
<td>8,723,643</td>
<td>12,417,609</td>
</tr>
<tr>
<td><strong>Interest and dividends (Note 3)</strong></td>
<td>-</td>
<td>1,027,134</td>
<td>-</td>
<td>1,027,134</td>
</tr>
<tr>
<td><strong>Net realized and unrealized gains</strong></td>
<td>-</td>
<td>4,431,710</td>
<td>-</td>
<td>4,431,710</td>
</tr>
<tr>
<td><strong>Total revenues and gains</strong></td>
<td></td>
<td>9,152,810</td>
<td>8,723,643</td>
<td>17,876,453</td>
</tr>
</tbody>
</table>

#### Expenses:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>General and administrative</td>
<td>624,718</td>
<td>-</td>
<td>-</td>
<td>624,718</td>
</tr>
<tr>
<td>Support to the Institution:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>3,514,364</td>
<td>-</td>
<td>-</td>
<td>3,514,364</td>
</tr>
<tr>
<td>Development (Note 6)</td>
<td>773,310</td>
<td>-</td>
<td>-</td>
<td>773,310</td>
</tr>
<tr>
<td>Program (Note 5)</td>
<td>1,603,719</td>
<td>-</td>
<td>-</td>
<td>1,603,719</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>6,516,111</td>
<td>-</td>
<td>-</td>
<td>6,516,111</td>
</tr>
</tbody>
</table>

#### Net assets released from restrictions

- 6,954,389

#### Change in net assets

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net assets - beginning</strong></td>
<td>(1,244,674)</td>
<td>9,685,699</td>
<td>55,468,037</td>
<td>63,909,062</td>
</tr>
<tr>
<td><strong>Net assets - ending</strong></td>
<td>$ (806,396)</td>
<td>$ 11,884,120</td>
<td>$ 64,191,680</td>
<td>$ 75,269,404</td>
</tr>
</tbody>
</table>

See accompanying notes.
For the year ended March 31, 2012

Revenues and gains:

<table>
<thead>
<tr>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash received:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>$</td>
<td>3,566,002</td>
<td>$</td>
</tr>
<tr>
<td>Endowment</td>
<td>-</td>
<td>62,550</td>
<td>1,920,212</td>
</tr>
<tr>
<td>Valuation adjustments and new pledges, net of collections</td>
<td>-</td>
<td>-</td>
<td>1,519,900</td>
</tr>
<tr>
<td>Total contributions</td>
<td>-</td>
<td>3,628,552</td>
<td>3,440,112</td>
</tr>
<tr>
<td>Interest and dividends (Note 3)</td>
<td>-</td>
<td>977,363</td>
<td>-</td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>(50,866)</td>
<td>1,111,862</td>
<td>-</td>
</tr>
<tr>
<td>Total revenues and gains</td>
<td>(50,866)</td>
<td>5,717,777</td>
<td>3,440,112</td>
</tr>
</tbody>
</table>

Expenses:

<table>
<thead>
<tr>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>General and administrative</td>
<td>623,809</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Support to the Institution:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>3,566,002</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Development (Note 6)</td>
<td>944,698</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Program (Note 5)</td>
<td>1,406,816</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total expenses</td>
<td>6,541,325</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Net assets released from restrictions | 6,625,755 | (6,625,755) | - | - |

Change in net assets | 33,564 | (907,978) | 3,440,112 | 2,565,698 |

Net assets - beginning | (1,278,238) | 10,593,677 | 52,027,925 | 61,343,364 |

Net assets - ending | $ (1,244,674) | $ 9,685,699 | $ 55,468,037 | $ 63,909,062 |

See accompanying notes.
For the years ended March 31,

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating activities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$11,360,342</td>
<td>$2,565,698</td>
</tr>
<tr>
<td>Adjustments to reconcile change in net assets to net cash flows from operating activities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net realized and unrealized gains</td>
<td>(4,431,710)</td>
<td>(1,060,996)</td>
</tr>
<tr>
<td>Depreciation</td>
<td>13,058</td>
<td>13,859</td>
</tr>
<tr>
<td>Changes in other operating assets and liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>(1,229,676)</td>
<td>(1,519,900)</td>
</tr>
<tr>
<td>Other assets</td>
<td>(90,988)</td>
<td>52,080</td>
</tr>
<tr>
<td>Payable to the Institution for program support</td>
<td>165,992</td>
<td>293,116</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>(5,829)</td>
<td>39,746</td>
</tr>
<tr>
<td>Amounts held in custody for others</td>
<td>(231,003)</td>
<td>(43,556)</td>
</tr>
<tr>
<td>Net operating activities</td>
<td>5,550,186</td>
<td>340,047</td>
</tr>
<tr>
<td><strong>Investing activities:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchases of property and equipment</td>
<td>(567)</td>
<td>(11,407)</td>
</tr>
<tr>
<td>Purchases of investments</td>
<td>(9,408,347)</td>
<td>(3,403,825)</td>
</tr>
<tr>
<td>Proceeds from sales of investments</td>
<td>3,576,527</td>
<td>3,563,007</td>
</tr>
<tr>
<td>Net investing activities</td>
<td>(5,832,387)</td>
<td>147,775</td>
</tr>
<tr>
<td>Net change in cash</td>
<td>(282,201)</td>
<td>487,822</td>
</tr>
<tr>
<td>Cash - beginning</td>
<td>838,795</td>
<td>350,973</td>
</tr>
<tr>
<td>Cash - ending</td>
<td>$556,594</td>
<td>$838,795</td>
</tr>
</tbody>
</table>

See accompanying notes.
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.

Basis of Presentation:
The Foundation reports information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

Unrestricted net assets represent cumulative losses of investments on a fund by fund basis.

Temporarily restricted net assets may be spent when relevant stipulations are met.

Essentially all contributions are recorded as restricted since they are received with donor stipulations that limit their use. When a donor restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions.

Permanently restricted net assets must be maintained in perpetuity. They are defined as follows:
• Specified funds - use of income is specified by the donor to a specific purpose of the Institution.
• Unspecified funds - use of income is unspecified as to purpose and may be used as the Institution determines.

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

Investments:
Investments in marketable securities are stated at fair value as determined by quoted market prices. Alternative investments include investments in partnerships whose holdings consist primarily of funds, and investments in limited partnerships that are reported at “estimated capital balances” determined by the investment managers.

To satisfy its long-term rate of return objectives, the Foundation relies on a total return strategy in which investment returns are achieved through both capital appreciation and current yield. The Foundation targets a diversified asset allocation that places a greater emphasis on equity-based investments to achieve its long-term return objectives within prudent risk constraints.

Property and Equipment:
Property and equipment is stated at cost or fair market value at the date of donation or acquisition cost, net of accumulated depreciation. Depreciation is provided over estimated useful lives using the straight-line method.

Spending from Permanently Restricted Endowment:
The Foundation’s spending policy for direct and indirect support to the Institution as well as for Foundation general and administrative expenses, applies to permanently restricted endowment funds. Beginning in fiscal year 2011, eligible spending can range from 3% to 6.5% of the beginning of year market value of the Foundation’s permanent endowment based on a formula.

Payable to the Institution for Program Support:
Program support payable to the Institution is for the benefit of the Institution and determined by mutual agreement between the Institution and the Foundation pursuant to the Foundation’s spending policy guidelines.

Promises to Give:
Unconditional promises to give that are expected to be collected in future years are recorded at the present value of estimated future cash flows. 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. Conditional promises to give to the Foundation or the Institution are not recorded as revenue until such time as the conditions are substantially met, and totaled $26,463,000 and $23,690,000 at March 31, 2013 and 2012.

Tax Status:
The Foundation is a 501(c)(3) corporation exempt from income taxes under section 501(a) of the International Revenue Code. The Foundation believes it is no longer subject to examination by Federal and State taxing authorities for years prior to 2010.

Use of Estimates:
The preparation of financial statements in conformity 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.

Subsequent events:
The Foundation has evaluated events and transactions for potential recognition or disclosure through June 17, 2013, the date the financial statements were available to be issued.
2. Contributions Receivable:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$3,932,186</td>
<td>$3,156,779</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>11,644,222</td>
<td>10,679,162</td>
</tr>
<tr>
<td></td>
<td>15,576,408</td>
<td>13,835,941</td>
</tr>
<tr>
<td>Less discount</td>
<td>7,535,870</td>
<td>7,025,079</td>
</tr>
<tr>
<td></td>
<td><strong>$8,040,538</strong></td>
<td><strong>$6,810,862</strong></td>
</tr>
</tbody>
</table>

Contributions at March 31, 2013 are expected to be received over the periods shown below:

<table>
<thead>
<tr>
<th>Period</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>$1,103,800</td>
</tr>
<tr>
<td>One through five years</td>
<td>2,027,448</td>
</tr>
<tr>
<td>Greater than five years</td>
<td>12,445,160</td>
</tr>
<tr>
<td></td>
<td><strong>$15,576,408</strong></td>
</tr>
</tbody>
</table>

Included in contributions receivable are various charitable remainder trusts. The present value of estimated future payments to the Foundation is calculated using a discount rate and applicable mortality tables. Changes in the valuation of the agreements are reported as contributions revenue in the statement of activities.

3. Investments:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketable securities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$3,773,500</td>
<td>$2,022,961</td>
</tr>
<tr>
<td>Equities</td>
<td>37,408,858</td>
<td>32,029,119</td>
</tr>
<tr>
<td>Fixed income securities</td>
<td>8,880,591</td>
<td>9,467,190</td>
</tr>
<tr>
<td>Alternative investments</td>
<td>18,067,235</td>
<td>15,110,931</td>
</tr>
<tr>
<td>Other</td>
<td>1,071,417</td>
<td>307,870</td>
</tr>
<tr>
<td></td>
<td><strong>$69,201,601</strong></td>
<td><strong>$58,938,071</strong></td>
</tr>
</tbody>
</table>

The underlying holdings within alternative investments include different types of sophisticated investment strategies with various liquidity restrictions. Liquidity for alternative investments is as follows as of March 31:

<table>
<thead>
<tr>
<th>Period</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redeemable at calendar year end with 75 to 95 days notice</td>
<td>$12,992,466</td>
</tr>
<tr>
<td>Illiquid with capital allowed at varying dates during the period 2016 through 2025</td>
<td>5,074,769</td>
</tr>
<tr>
<td></td>
<td><strong>$18,067,235</strong></td>
</tr>
</tbody>
</table>

The Foundation has committed capital of approximately $10,890,000 to private equity alternative investments. The unfunded portion of the commitments total approximately $5,361,000 as of March 31, 2013.

Investment management fees of $472,406 and $466,468 for 2013 and 2012 are recorded in the statements of activities as follows:

<table>
<thead>
<tr>
<th>Fees netted against interest and dividend income</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>General and administrative expense</td>
<td>315,843</td>
<td>288,905</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$472,406</strong></td>
<td><strong>$466,468</strong></td>
</tr>
</tbody>
</table>

4. Property and equipment:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td>$12,500</td>
<td>$12,500</td>
</tr>
<tr>
<td>Building</td>
<td>152,275</td>
<td>152,275</td>
</tr>
<tr>
<td>Office equipment and furnishings</td>
<td>148,894</td>
<td>149,969</td>
</tr>
<tr>
<td></td>
<td>313,669</td>
<td>314,744</td>
</tr>
<tr>
<td>Less accumulated depreciation</td>
<td>253,979</td>
<td>242,563</td>
</tr>
<tr>
<td></td>
<td><strong>$59,690</strong></td>
<td><strong>$72,181</strong></td>
</tr>
</tbody>
</table>

5. Distributions to the Institution:

Amounts payable for program support at March 31:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income and principal</td>
<td>$1,603,719</td>
<td>$1,406,816</td>
</tr>
<tr>
<td>Income from prior periods</td>
<td>353,704</td>
<td>384,615</td>
</tr>
<tr>
<td></td>
<td><strong>$1,957,423</strong></td>
<td><strong>$1,791,431</strong></td>
</tr>
</tbody>
</table>

The following amounts were recorded as program support to the Institution for the years ended March 31:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income from permanently restricted endowments</td>
<td>$1,476,843</td>
<td>$1,238,524</td>
</tr>
<tr>
<td>Income and principal from temporarily restricted gifts and other funds</td>
<td>126,876</td>
<td>168,292</td>
</tr>
<tr>
<td></td>
<td><strong>$1,603,719</strong></td>
<td><strong>$1,406,816</strong></td>
</tr>
</tbody>
</table>

6. Other Transactions with the Institution:

Pursuant to an agreement between the Foundation and the Institution, the Foundation reimburses the Institution regularly for various personnel and administrative expenses. Additionally, the Foundation was reimbursed $350,000 and $200,000 in 2013 and 2012 by the Institution for development services the Foundation provided to the Institution. These amounts are included as a reduction of 2013 and 2012 development expenses in the accompanying statement of activities.
The Foundation guaranteed a promissory note payable by the Institution totaling $1,237,933 at March 31, 2013. Amounts held by the Foundation on behalf of the Institution to help repay the note totaled $757,209 and $988,212 at March 31, 2013 and 2012.

7. Net Assets:
At March 31, 2013 and 2012, the market value of certain endowment funds was $806,396 and $1,244,674 lower than the original gifted values due to investment experience. These amounts are reflected in the statements of financial position as negative unrestricted net assets.

Temporarily restricted net assets are comprised of income and gifts restricted for the following purposes:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$ 5,157,575</td>
<td>$ 4,035,239</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>2,120,098</td>
<td>1,560,912</td>
</tr>
<tr>
<td>Temporarily restricted gifts</td>
<td>4,606,447</td>
<td>4,089,548</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$11,884,120</strong></td>
<td><strong>$9,685,699</strong></td>
</tr>
</tbody>
</table>

Temporarily restricted gifts are comprised of income and gifts restricted for the following purposes:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains - specified endowments</td>
<td>$ 5,157,575</td>
<td>$ 4,035,239</td>
</tr>
<tr>
<td>Gains - unspecified endowments</td>
<td>2,120,098</td>
<td>1,560,912</td>
</tr>
<tr>
<td>Temporarily restricted gifts</td>
<td>4,606,447</td>
<td>4,089,548</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$11,884,120</strong></td>
<td><strong>$9,685,699</strong></td>
</tr>
</tbody>
</table>

Permanently restricted net assets have been restricted by donors to be maintained by the Foundation in perpetuity. The Foundation’s Board has interpreted the New York State Prudent Management of Institutional Funds Act (NYPMIFA), effective September 17, 2010, and prior law, Uniform Management of Institutional Funds Act (UMIFA), 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 permanently restricted net assets (a) the original value of gifts donated to the permanent endowment, (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of a donor gift instrument at the time the accumulation is added to the fund.

Any remaining portion of donor restricted endowment funds not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Foundation in a manner consistent with the standard of prudence prescribed by NYPMIFA. 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

Permanently restricted net assets are comprised of the following endowment gift categories:

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specified endowments</td>
<td>$ 45,251,338</td>
<td>$ 36,146,341</td>
</tr>
<tr>
<td>Unspecified endowments</td>
<td>18,940,342</td>
<td>19,321,696</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$64,191,680</strong></td>
<td><strong>$55,468,037</strong></td>
</tr>
</tbody>
</table>

8. 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 $72,000 and $73,000 for the years ended March 31, 2013 and 2012.

9. Fair Value Measurements:
Investments in marketable securities are measured at fair value on a recurring basis in the statements of financial position. The fair value for all amounts at March 31, 2013 and 2012 were determined based on quoted prices in active markets.
The Board of Directors
Chautauqua Foundation, Inc.

We have audited the financial statements of Chautauqua Foundation, Inc. as of and for the years ended March 31, 2013 and 2012 and have issued our report thereon dated June 17, 2013, which expressed an unmodified opinion on those financial statements. Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The schedules of expenses for the years ended March 31, 2013 and 2012 are presented for the purposes of additional analysis and are not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audits of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

June 17, 2013

<table>
<thead>
<tr>
<th>For the years ended March 31,</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>General and administrative:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment management</td>
<td>$315,843</td>
<td>$288,905</td>
</tr>
<tr>
<td>Salaries and benefits</td>
<td>$230,511</td>
<td>$238,998</td>
</tr>
<tr>
<td>Office and operating</td>
<td>$10,263</td>
<td>$15,475</td>
</tr>
<tr>
<td>Travel</td>
<td>$23,505</td>
<td>$31,226</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>$21,300</td>
<td>$33,790</td>
</tr>
<tr>
<td>Equipment maintenance and repairs</td>
<td>$14,982</td>
<td>$7,588</td>
</tr>
<tr>
<td>Other</td>
<td>$8,314</td>
<td>$7,827</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$624,718</strong></td>
<td><strong>$623,809</strong></td>
</tr>
<tr>
<td>Support to the Institution:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chautauqua Fund</td>
<td>$3,514,364</td>
<td>$3,566,002</td>
</tr>
<tr>
<td>Development:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and benefits</td>
<td>$828,969</td>
<td>$849,656</td>
</tr>
<tr>
<td>Promotion</td>
<td>$151,025</td>
<td>$148,499</td>
</tr>
<tr>
<td>Office and operating</td>
<td>$81,711</td>
<td>$83,739</td>
</tr>
<tr>
<td>Professional and consulting</td>
<td>$44,019</td>
<td>$46,097</td>
</tr>
<tr>
<td>Equipment maintenance and repairs</td>
<td>$11,151</td>
<td>$13,843</td>
</tr>
<tr>
<td>Education</td>
<td>$6,435</td>
<td>$2,864</td>
</tr>
<tr>
<td>Reimbursement by the Institution</td>
<td>(350,000)</td>
<td>(200,000)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$773,310</strong></td>
<td><strong>$944,698</strong></td>
</tr>
<tr>
<td>Program:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building, structures and grounds</td>
<td>$184,665</td>
<td>$137,674</td>
</tr>
<tr>
<td>General operations</td>
<td>$366,136</td>
<td>$486,061</td>
</tr>
<tr>
<td>Lectureship and CLSC</td>
<td>$373,005</td>
<td>$259,446</td>
</tr>
<tr>
<td>Performing arts</td>
<td>$372,555</td>
<td>$309,652</td>
</tr>
<tr>
<td>Religion</td>
<td>$127,925</td>
<td>$85,966</td>
</tr>
<tr>
<td>Scholarship and youth</td>
<td>$179,433</td>
<td>$128,017</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,603,719</strong></td>
<td><strong>$1,406,816</strong></td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td><strong>$6,516,111</strong></td>
<td><strong>$6,541,325</strong></td>
</tr>
<tr>
<td>Category</td>
<td>2013</td>
<td>2012</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------</td>
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### ENDOWMENT FUNDS

#### UNSPECIFIED FUNDS

<table>
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<tr>
<th>Assets</th>
<th>Current Year Distribution</th>
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<td>$22,904,450</td>
<td>$239,259</td>
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* Income and principal may be distributed

New funds are designated in [orange](#).

- Paul M. Alexander Fund *
- Dorothy L. Anderson Endowment for Chautauqua
- Mary Apple Fund *
- Robert and Je’Anne Bargar Endowment
- Zoe and Ken Barley Endowment
- Beatrice B. Bates Fund
- Julia M. Bates Fund
- Nancy and Dick Bechtolt Fund
- Thomas and Jane Becker Endowment
- Bemus Fund for Chautauqua
- Gordon Benn Fund
- Alan J. and Mary Hough Blair Fund
- Cora M. 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 *
- 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**
- Dietrich Family Endowment at Chautauqua
- Martha T. and Morgan O. Doolittle Fund
- Lora Lee and Bob Duncan Endowment
- Ann O. Edison Endowment *
- Mina Miller Edison Fund
- Albert C. Elser II Fund
- Cordelia C. Ensign 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
- Gelb Family Endowment for Chautauqua
- William R. and Betsy Callicott Goodell Endowment
- **Kathleen M. and Donald C. Greenhouse 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
- Heber R. Harper Fund
- Lisa Heinz Endowment for Chautauqua
- Dorothy S. and William P. Hill, II Endowment for Chautauqua
- Holden Family Fund
- Charles R. Hunter, Jr. Fund
- Esther M. Huntoon Fund
- Verna Jackson Memorial Endowment for Chautauqua
- James Family Fund
- Katherine King Karlslake Fund
- Ronald L. and Rosie C. Kilpatrick Endowment
- Georgiana Bole King Endowment
- The Lawrence G. Knecht Fund
- Knox Family Endowment
- Konneker Fund
- Mary E. Kuhns Fund
- Velma Jean Laird Endowment
- **Oliver M. Langenberg Fund**
- Robert and Susan Laubach Endowment
- LeClere Family Endowment
- Elizabeth S. & Reginald A. Lenna Fund
- Stella C. Logan Fund
- William Charles Lortz Endowment
- Sara M. and Robert S. Lucas Fund
- Stan and Sara Lundine Fund
- Lyndall Family Fund
- Ann and Charles H. Lytle Endowment
OLIVER M. LANGENBERG FUND

Investor, entrepreneur, philanthropist, art enthusiast, philosopher, thinker, and athlete can all be used to describe Oliver Langenberg. Another descriptor to add to the extensive list - visionary. Oliver was a genuine man of the world whose nearly century-old journey led him to Chautauqua for one or two weeks each summer. He had the forethought to see beyond the present and envision what Chautauqua’s future may look like well beyond his own. At Oliver’s passing, just two weeks shy of his 100th birthday, he remembered Chautauqua Institution with one of the most remarkable gifts in the history of the Foundation. His gift has been added to the Foundation’s unspecified endowment to be used to support the totality of the Chautauqua experience.
SPECIFIED FUNDS
$43,206,474 Assets
$1,237,574 Current Year Distribution

New funds are designated in orange.

PHYSICAL MAINTENANCE FUNDS
$6,858,491 Assets
$184,665 Current Year Distribution

Buildings and Structures
$5,554,708 Assets
$150,979 Current Year Distribution
Amphitheater Endowment Fund
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 Foundation Fund for Youth
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 Bonnefous-McBride Hall
Golf Course Maintenance and Growth Fund
The Seth A. and Helen F. Goodwin Fund to Maintain the Pier Building
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. Lenya Hall Endowment Fund
The Helen Colvill Lincoln Fund to Maintain Lincoln Memorial Dormitory
The Massey Memorial Organ Fund
The McClure Shuffleboard Fund
McKnight Hall Maintenance Endowment

Specific Gardens and Parks
$850,360 Assets
$23,301 Current Year Distribution
The Reid B. Babcox Memorial Garden Terrace Endowment
The Bell/Ritts 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
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
Henrietta Ord Jones Memorial Fund
The JoAnn Jubell Memorial Fund
The Judson Park Fund
Joan Lincoln Garden Fund
The Wilfred B. McCune Memorial Garden Fund
Mary Louise Molyneaux Garden Fund
Penneys Garden Endowment
Ride/Savage Memorial Garden Fund
The Michael M. Ross Garden Fund
The Mme. Shao Fang Sheng Garden Fund
HAGEN-WENSLEY
GUEST HOUSE ENDOWMENT

By 2010 the Wensley Guest House, built in 1891, was in desperate need of a renovation. The building was quite simply sagging and becoming unfit as the predominate accommodations for Chautauqua’s performers and speakers. Longtime Chautauquan and philanthropist, Susie Hagen of Erie, Pennsylvania took on the sizable project with a gift of $2 million dollars that thoroughly modernized the house with respect for the historical structure. The Hagens also thought about the future by funding a $350,000 endowment for care and maintenance of the guest house - a goal that the Chautauqua administration has for every facility.

Toni Sterman Memorial Garden
The Stephen Toms Garden 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
$453,423 Assets
$10,385 Current Year Distribution
D.A.R. Flag Fund
Garden Beautification Fund
Louise Marshall Lincoln Memorial Garden Fund
The Constance Lincoln Newbury Memorial Garden Fund
The Walter C. Shaw, Jr. Family Tree Fund
Tree Fund

EDUCATION & YOUTH FUNDS
$8,891,135 Assets
$245,620 Current Year Distribution

Lectureships
$7,420,990 Assets
$198,083 Current Year Distribution
10:45 Lecture Platform Endowment
Malcolm Anderson Lecture Fund
The Sondra R. and R. Quintus Anderson Lectureship
David and Wendy Barenfeld 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 Foglesong Family Lectureship Fund
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
The Dr. Robert R. Hesse Lectureship
The Higie Family Lectureship
The Robert Jacobs Memorial Lectureship Fund
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
JUDGE W. WALTER BRAHAM
GARDEN FUND

Jim and Kathy Braham of Pittsburgh, Pennsylvania have
generously created the Judge W. Walter Braham Garden
located on Bestor Plaza in front of the Chautauqua Bookstore.
The garden honors the legacy of Jim’s late father who became
judge of Lawrence County, Pennsylvania in 1936 and served as
the ninth President of Chautauqua Institution from 1956-1960.
The judge was known as a spell-binding speaker and a brilliant
attorney who was also a student of religion, history, government,
and politics. Once introduced to Chautauqua by his bride, Selina
Whitla Braham, he became a fully engaged Chautauquan. The
Judge W. Walter Braham Garden Endowment will provide for the
care and maintenance of the garden.

Margaret Miller Newman Lectureship Fund
Kathryn Sisson Phillips Memorial Lectureship Fund
The Richard and Emily Smucker Endowment Fund
The Frank G. Sterritte Memorial Lectureship
The Ethel Paris and Theodore Albert Viehe Lectureship
The Dorothy M. Wissel Lectureship

Literary Arts
$936,644 Assets
$32,197 Current Year Distribution
The Baird-Fuller Memorial Fund
Caroline Roberts Barnum and Janus 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
Court Family Endowment for the Literary Arts
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
The Martha and Scott Reading Fund
Grace Tongren Ross Fund for Smith Memorial Library
Smith Memorial Library Fund

Youth Activities
$533,501 Assets
$15,340 Current Year Distribution
Ward T. Bower Youth Activities Memorial

Elizabeth Elser Doolittle 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
The Popp Family Fund
Paul L. Sample Memorial Fund
Andrew and Donna Sorensen Youth Activities
Center Endowment
The Laurence and Maria Wagner Family Fund
Youth Activities Fund

FINE & PERFORMING
ARTS FUNDS
$13,196,598 Assets
$372,554 Current Year Distribution

General
$2,584,766 Assets
$79,435 Current Year Distribution
Artists Appreciation Fund
The John T. and Katherine G. Bailey Family Fund
The Boyle Family Fund for the Performing Arts
Emily and John Corry Endowment for the Performing Arts
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
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
DONALD WEST KING, SR. & FRANCIS LILA LEE KING LECTURESHIP

In 1940, at fourteen years old and a student at Jamestown High School, Donald West King took his first job landscaping the grounds and cleaning the Amphitheater. Now a renowned expert in the field of pathology, Dr. King and his wife, Dr. Mary Elizabeth Dickason King, also an expert pathologist, visit Chautauqua each summer. A testament to his love and loyalty to Chautauqua, Dr. King has hardly missed a single summer since taking that first job. To honor his parents, Dr. King has established the Donald West King, Sr. & Francis Lila Lee King Lectureship that will support the morning lecture series. In its inaugural year the lectureship will support the presentation by Harvey V. Fineberg, president of the Institute of Medicine, during the week on Health Care: Reform and Innovation.

Opera
$3,926,234 Assets
$100,483 Current Year Distribution

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
Bennus 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 and Lois Weaver Fund for Opera

Dr. Fred R. Whaley and Helen A. Whaley Fund for Opera
The Robert and Virginia Young Opera Fund
Zemsky Endowment For Opera

Symphony
$3,551,994 Assets
$108,183 Current Year Distribution

Clement and Karen Arrison Endowment for Classical Violin
Maggie Bella Symphony Orchestra Endowment Fund
The Boyle Family Fund for the Chautauqua Symphony Orchestra
The Mary Peterson Chalfant Fund for the Chautauqua Symphony Orchestra
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 and Lois Weaver Fund for Opera

The Robert and Virginia Young Opera Fund
Zemsky Endowment For Opera
JOAN BROWN CAMPBELL DEPARTMENT OF RELIGION ENDOWMENT

When Rev. Joan Brown Campbell announced she would retire at the end of 2013 as Director of the Department of Religion the wheels were put in motion to honor Joan’s work and her contributions to the Chautauqua community and ensure the resources would be available to carry on that work. Barb Mackey, inspired by Joan’s vision, made the largest single gift commitment the Department of Religion has ever received through the combination of annual contributions and ultimately, through a bequest to establish the Joan Brown Campbell Department of Religion Endowment. Additional gifts are continuing to be added honoring Joan’s legacy.

Nora J. Williams Symphony Fund
Dent and Joan Williamson Fund for the Chautauqua Symphony Orchestra

THEATER

$452,973 Assets
$9,176 Current Year Distribution
The Arnold and Jill Bellowe Fund for Theater
The Nancy E. Brewer Fund for Theater
Chautauqua Theater Fund
The Crockett Family Fund for Theater
The Agnes H. and Hal A. Fausnaugh Fund for Theater Programming
The Joel and Barbara Jacob and M. Jacob and Sons Fund for Theater
Helen Moe Fund for Theater
The Florence and Cynthia Norton Fund for Theater
The Phoebe Wagner Ott Theater Fund

DANCE

$1,077,209 Assets
$18,983 Current Year Distribution
The Paul and Toni Branch Fund for Dance
Carnahan-Jackson Dance Chair Endowment
The Carnahan-Jackson Dance Endowment
Moore Fund for Dance

VISUAL ARTS

$1,603,422 Assets
$56,294 Current Year Distribution
Je’Anne Griffin Bargar Endowment for Visual Arts
The Chautauqua Art Association, Inc. Visual Arts Fund
Chip and Gail Gamble Visual Arts Endowment

Joan and David Lincoln Ceramics Endowment
Florence H. Norton and Cynthia Norton Visual Arts Endowment
VACI Gallery Director Endowment

RELIGION FUNDS

$3,989,126 Assets
$127,926 Current Year Distribution

GENERAL

$1,300,564 Assets
$46,793 Current Year Distribution
Campbell Department of Religion Fund
Eleanor B. Daugherty Fund
Department of Religion Fund
Department of Religion Leadership Fund
Carrell Leiper Hall Memorial Fund in Honor of Dr. Henry Smith Leiper
Lois Raynow Department of Religion Fund
The Waasdorp Fund for Religious Initiatives

CHAPLAINCIES

$743,851 Assets
$27,272 Current Year Distribution
Marie Reid-Edward Spencer Babcox Memorial Fund
Robert D. Campbell Memorial Chaplaincy
Daney-Holden Chaplaincy Fund
The Mr. and Mrs. William Uhler Follansbee Memorial Chaplaincy
J. Everett Hall Memorial Chaplaincy
Samuel M. and Mary E. Hazlett Memorial Fund
Jackson-Carnahan Memorial Chaplaincy
Alison and Craig Marthinsen Endowment for the Department of Religion
The Geraldine M. and Frank E. McElree, Jr. Chaplaincy Fund

ENDOWMENT FUNDS (CONT.)
Randell-Hall Memorial Chaplaincy
Harold F. Reed, Sr. Chaplaincy
Edmond E. Robb-Walter C. Shaw Fund
John William Tyrrell Endowment for Religion

Lectureships
$1,128,524 Assets
$32,019 Current Year Distribution
Carnahan-Jackson Religious Lectureship
The Jack and Elizabeth Gellman and Zaretsky Family Fund
The Ralph W. Loew Religious Lectureship Fund
Robert S. and Sara M. Lucas Religious Lectureship
Eileen and Warren Martin Lectureship Fund for Emerging Studies in Bible and Theology
Eugene Ross McCarthy Memorial Fund
Rachel Alice Miller Memorial Fund
The Presbyterian Association of Chautauqua Religious Lectureship Fund
Arthur and Helen Reycroft Memorial Religious Lectureship Fund
Gertrude Elser Schroeder Fund
The H. Parker and Emma O. Sharp Lectureship Fund
Rabbi Samuel and Lynn Stahl Lectureship for the Understanding of Judaism

Other
$816,187 Assets
$21,842 Current Year Distribution
Alice A. Allen Fund
John E. Anderson Religion Endowment
The Reverend Noel A. Calhoun, Jr., D.D. Fund
Campbell Department of Religion Audio-Visual Fund
Joan Brown Campbell Department of Religion Endowment
The Chautauqua Fund for Sacred Music
Fund for the Exploration of World Religions and Spiritual Practices
The Holden-Daney Fellowship Fund
Dr. William N. Jackson Religious Initiative Fund
Arville G. Light, Jr. Fund for Religion
The Myra Baker Low and Katharine Low Hembree Family Fund
S.R. and Jennie Hamill McClure Family Fund
The William H. and Mary C. Park Religious Programming Fund
Harold F. and Mary Lou E. Reed Family Fund
The Reeve Family Choir Music Fund
Religious Initiatives Fund
The Ann Simpson Rice Flower Fund
The Allen Steere, Sr. Fund for the Department of Religion

Scholarship Funds
$5,671,822 Assets
$164,093 Current Year Distribution
A. Chace Anderson Fine and Performing Arts Scholarship
Peggy and Andy Anderson Family Scholarship Fund
Richard W. Antemann Memorial Scholarship
Barakat Scholarship
The Michael L. Barnett Scholarship Fund
Bell Tower Scholarship Fund
The Jill W. Bellowe Chautauqua Conservatory Theater Scholarship
The Chuck Berginc Scholarship
Dr. and Mrs. Arthur E. Bestor Scholarship Fund
The Frances Black Scholarship Fund
The Margaret B. Blossom Scholarship
Bonnefoux/McBride Dance Scholarship
June and Albert Bonyor Scholarship Fund for Ballet
Alexander W. Bouchal Memorial Scholarship
Ward T. Bower Memorial Scholarship
Frederick Percival Boynton Scholarship
JoAnn and Gene Buffo Voice Scholarship
Lowell and Frances Hyam Brentano Fund
The Anne C. Britton Memorial Scholarship
The Charles and Ethel Brody Theater Scholarship
The Gladys Brooks Scholarship Endowment Fund
The Indiana-Peggy Hoover Bryan Voice Scholarship
Shirley Budke Memorial Fund for Blind Students
The Edwin L. Bullock Scholarship
The Lillian B. Bullock Scholarship
Burden-Staples Music Scholarship
Bennett and Mary Jo Burgoo Memorial Scholarship
The Andrew L. and Gayle Shaw Camden Fund for Theater Arts
The Carnahan-Jackson Scholarship Fund
The Chautauqua Art Scholarship
The Chautauqua Golf Club Scholarship Fund
The Chautauqua Theater Scholarship
The Chautauqua Voice Scholarship
Clark Scholarship Fund
Joseph Clarke Scholarship Fund
Clarkson Family Scholarship
The Theodore R. Colborn Scholarship
The William Cole/King Scholarship
Beverly and Bruce Conner Scholarship Fund
James and Barbara Copeland Scholarship Fund
The Bettsy and Ellis Cowling Scholarship for Music
The Daley Family Fund
Eleanor B. Daugherty Scholarship Fund
Diamond Jubilee Class of 1948 Scholarship
Mary Lowe Dickinson Scholarship
Dietrich Family Endowment for Music at Chautauqua
The Mardelle Dressler Dobbins Scholarship
The Rachel W. Eaton Scholarship
The Bina Edkin Eckerd Memorial Fund for the Fine and Performing Arts
The Robert Hunt and Mary Campbell Eckhardt Memorial Scholarship
David and Miriam Yanes Eddleman Voice Scholarship
The Miriam Yanes Eddleman Dance Scholarship
Mary Cummings Paine Eudy Scholarship
The Falk Scholarship Fund
The Agnes H. and Hal A. Fausnaugh Chautauqua Conservatory Theater Scholarship
Beverly and Marvin Fiegelman Scholarship Fund for the Performing Arts
Genevieve Foote Findley Scholarship
Ted and Deborah First Scholarship
Edith Reid Flaster Memorial Dance Scholarship
The Luella Morris Forney Memorial Scholarship
Wilbur D. Forney Memorial Scholarship Fund
Dr. Stephen Fudell Memorial Scholarship Endowment
The Harriet B. and Ralph T. Geller Memorial Scholarship
Marjorie Geller Memorial Dance Scholarship
The Elizabeth & Jack Gellman and Deborah & Allen Zaretsky Scholarship Fund
General Scholarship Fund
The Howard G. Gibbs Scholarship Fund
Sheila Gitlitz Scholarship Endowment
The Gitlitz Scholarship Fund for Visual Arts
Glendorn Foundation Scholarship Fund
Golay-Bradford Endowment for Families
The Rosalyn Goldberg Scholarship Fund
The Toni and Joseph Goldfarb Scholarship Fund for Fine & Performing Arts
The Alfred E. Goldman Scholarship
The Jessie D. Grassie Class of 1882 Scholarship
Franklin P. & Fern Green and William P. & Ruth Bates Art Scholarship
The Groff-Simpson Family Scholarship
Grover Family Scholarship Fund
G. Thomas & Kathleen Harrick Music Scholarship
Harris Scholarship for Performing Arts
Ruth Higby Haver and Della and David Higby Music Scholarship
Lillian B. Hersh Music Scholarship
William and Pauline Higie School of Dance Scholarship
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The Anna Mary & Richard M. Maddy Music Scholarship Fund

Richard and Anna Mary Maddy spent their summers in Chautauqua raising their five sons and enjoying many aspects of Chautauqua including the opera, lectures, swimming, sailing, and art. Music, however, resonated with all the family members. As a lasting tribute to days spent enjoying all of the musical offerings of the Chautauqua program, Richard and Anna Mary, who died in 2006 and 2011 respectively, left a bequest that created the Anna Mary and Richard M. Maddy Music Scholarship which will fund a student in the School of Music each year in perpetuity.
The Marilyn G. Levinson and Nathan Gottschalk First Chair Award for MSFO Endowment
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FLEXIBLE PROGRAM FUNDS
$3,892,000 Assets
$114,040 Current Year Distribution

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OTHER SPECIFIED FUNDS
$707,302 Assets
$28,676 Current Year Distribution

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$96,876 Current Year Distribution

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SEGREGATED ENDOWMENT FUND
$120,364 Assets
$30,000 Current Year Distribution

Harry A. Logan, Jr. Fund for the Performing Arts
$75,269,404
The Foundation’s net assets as of March 31, 2013

$18,037,647
Total philanthropic dollars committed during fiscal year 2013

3,185
Total number of unique donors who made a gift to the Chautauqua Fund, endowment, or capital and other during fiscal year 2013

10.3%
The Foundation’s five year average cost of fundraising as a percentage of total philanthropy

671
Number of active endowments held by the Foundation as of March 31, 2013

72%
Fiscal 2013 increase in total philanthropy over the previous year
The following donors have contributed $10,000 or more to the Chautauqua Foundation. We thank them for perpetuating the idea and place of Chautauqua. These totals include gifts and pledges received or transferred and held in trusts or the pooled life income fund since May 1937.

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Virginia H. Cox
Martin A. Coyle
John and Linda Creech
Christopher and Susan Cribbs
Joseph and Nancy Cruickshank
Barbara and John Cummings
Lindy McKnight and Erin Cunningham
Laura and Brad Currie
James and Karen Dakin
Dan and Carrie Dauner
David Delancey
Jennifer DeLancey
John P. DeVillars
June and Barry Dietrich
John and Virginia DiPucci
Judith and Roger Doebke
Rev. Linda L. Dominik
Lee and Barbara Dudley
Carol McCarthy Duhme
Cynthia Norton and Eagle Eagle
David and Miriam Y. Eddelman
Mr. and Mrs. Hal A. Fausnaugh
Sylvia M. Faust
Norma Ferguson
Rita Van Wie Finger
Lucille and Michael Flint
Shirley A. Flynn
George L. Follansbee, Jr.
Caryn and Henry Foltz
Charlotte and Chuck Fowler
Barbara Fox
Zetta and Ken Fradin
Joanne Fuller
Louise Farnsley Gardner
vic and Joan Gelb
Marc Geller
Barbara and Peter Georgescu
William and Nancy Gerdes
Lauren Rich Fine and Gary Giller
Sherry Stanley and John Giusti
Carole E. Gladstone
Clara W. Golay
Joseph and Toni L. Goldfarb
Karen and Tim Goodell
Dr. Cheryl O. Gorelick
Carolyn Graffam
Suzanne Gray
Don and Kathy Greenhouse
Fred and Judy Gregory
Kent I. and Fredrika S. Groff
Elisabeth and Jim Groninger
Carl Grunfeld
Linda J. Hack
Murray and Pegi Hamner
Mr. and Mrs. James Pryor Hancock
Kathleen E. Hancock
Judith L. Hanson
Walter and Joan Harf
Terrie Hauck
Paula and Ray Hecker
William and Anne Mischakoff Heiles
George Herchenroether
Dorothy and Bill Hill
Mr. D. Armour Hillstrom
Patricia and Robert Hirt
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Mary Ellen and Robert Ivers
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Lois Johnston Walpole James
Karín A. Johnson
Lucille Jordan
David and Nan Jubell
John F. and Mary Giegengack Jureller
Jeanette Kahlenberg
Norman and Nancy Karp
Bill and Martha Karslake
Judy and Leonard Katz
Naomi and Charles Kaufman
Joan Keogh
Jane and Chaz Kerschner
Patricia L. King
William M. Kinley
Bob and Priscilla Kirkpatrick
Joan G. Kissner

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Chuck and Peg Korte
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Judy and Jim Kullberg
Philip A. Kuster
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Robert D. Lang
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Miriam S. Reading and Richard H. Miller
Kurt Miller and Karen Williams Miller
Sylvia Lucas Miller
KeeKee Minor
Dr. Steve and Mary Gibbs Mitchell
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Sally Moore
Mary Anne Morefield
Wayne and Marilyn Morris
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Cynthia and Robert Murray
Dusty Nelson
Jay and Joyce Nesbit
Karen Paul Newhall
Dr. Lillian Ney
Susan Nusbaum
Anne and Stephen Odland
Monica Ondrusko
Melissa and George Orlov
Barbara Brandwein Painkin
Anne and Jack Palomaki
Mary Lou Cady Parlato
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Lois and Edward Paul
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Philip and Rachel Rogers
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Marcia and Jerry Rothschild
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Edward C. Schmidt
J. Jason Phillips and Sheila Schroeder
Helene Schwartz
Susan B. Scott
Sheldon and Phyllis Seligsohn
Dr. and Mrs. William Blake Selnick
Mary Jane DeVillars Shank
Becky Sharp
Mary Ellen Sheridan
Elaine and Allen Short
Elizabeth Wade Siegel
Harriet Simons
Edie and Dan Sklar
Penny and Tom Small
Darwin and Myra Smith
George and Maggie Snyder
Benjamin S. and Anna Fornias Sorensen
Merritt H. and David S. Spier
Rabbi Samuel and Lynn Stahl
Dorothy B. Stevenson
Lowell and Rebecca Strohl
Lydia Strohl and Eric Riddleberger
Mrs. Mary C. Swanson
Mrs. W. Wendle Taggart
Robert and Joyce Tate
Margery B. Tate
Stephen and Patricia Telkins
Janet Templeton
Linda and Robert Thomas
Allison O. Tigemeier
Susan and Jack Turben
Karen S. Turcotte
Mary Tymeson
Rev. George E. Tutwiler
Mrs. Spencer Van Kirk
Tara Van Derveer
Judith Claire and Robert W. Van Every
Dr. Carol Voaden
Edward and Melanie Voboril
Nancy Waasdoor
John and Linda Wadsworth
Laurence and Maria Wagner
Carolyn and Bill Ward
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Herbert R. and Lorraine H. Weier
Beatrice Weiner
Linda Steckley and Pete Weitzel
Cynthia C. and Terry R. White
Lee White
Caroline Levasseur and Heather Whitehouse
Dr. Jeanne Wiebenga
Mark Williams
Dent and Joan Williamson
Jane Foster and Arthur Willson
Mrs. Jean Wilson
Lou B. Wineman
Subagha Kaur and Subagha Khalsa Winkelstern
Sally L. Wissel
Caroline Young
Robert and Donna Zellers
Patricia Feighan and Stephen Zenczak
Barbara Zuegel
### Directors

<table>
<thead>
<tr>
<th>Name</th>
<th>Term Expires</th>
</tr>
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<tbody>
<tr>
<td>John E. Anderson of Lakewood, New York</td>
<td>2016</td>
</tr>
<tr>
<td>Thomas M. Becker of Lakewood, New York</td>
<td>ii</td>
</tr>
<tr>
<td>Gary M. Brost of Buffalo, New York</td>
<td>2016</td>
</tr>
<tr>
<td>Andrew L. Camden of Grosse Pointe, Michigan</td>
<td>2013</td>
</tr>
<tr>
<td>John S. Connolly, Jr. of Boynton Beach, Florida</td>
<td>2014</td>
</tr>
<tr>
<td>John A. Corry of Bronxville, New York</td>
<td>2013</td>
</tr>
<tr>
<td>Laura P. Currie of Nashville, Tennessee</td>
<td>2014¹</td>
</tr>
<tr>
<td>Lauren Rich Fine of Shaker Heights, Ohio</td>
<td>2016</td>
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<tr>
<td>Karen J. Goodell of New York, New York</td>
<td>2013</td>
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<tr>
<td>William R. Goodell of Bronxville, New York</td>
<td>2014</td>
</tr>
<tr>
<td>James G. Groninger of Richmond, Virginia</td>
<td>2014¹</td>
</tr>
<tr>
<td>Thomas B. Hagen of Erie, Pennsylvania</td>
<td>2013</td>
</tr>
<tr>
<td>John S. Kobacker of Gahanna, Ohio</td>
<td>2015</td>
</tr>
<tr>
<td>Christopher H. Lytle of New York</td>
<td>2014</td>
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<tr>
<td>Susan Moran Murphy of Bloomfield Hills, Michigan</td>
<td>2014</td>
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<tr>
<td>I. Hale Oliver of Upper Saint Claire, Pennsylvania</td>
<td>2013</td>
</tr>
<tr>
<td>Steven W. Percy of Akron, Ohio - ex officio</td>
<td>2015</td>
</tr>
<tr>
<td>Chair, Personnel Committee</td>
<td></td>
</tr>
<tr>
<td>Chair, Executive Committee</td>
<td></td>
</tr>
<tr>
<td>Chair, Board of Directors</td>
<td></td>
</tr>
</tbody>
</table>

### Officers

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steven W. Percy</td>
<td>Chairman</td>
</tr>
<tr>
<td>John S. Connolly, Jr.</td>
<td>Vice Chairman</td>
</tr>
<tr>
<td>George L. Follansbee, Jr.</td>
<td>Chief Executive Officer</td>
</tr>
<tr>
<td>Deborah E. Moore, CPA</td>
<td>Treasurer &amp; Chief Financial Officer</td>
</tr>
<tr>
<td>Linda Jordan Loomis</td>
<td>Corporate Secretary</td>
</tr>
</tbody>
</table>

### Staff

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
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</thead>
<tbody>
<tr>
<td>Chris J. Baglia</td>
<td>Gift Administrator</td>
</tr>
<tr>
<td>Karen Blozie</td>
<td>Director of Gift Planning</td>
</tr>
<tr>
<td>Jacqueline A. Chagnon</td>
<td>Stewardship &amp; Donor Relations</td>
</tr>
<tr>
<td>Tina E. Downey</td>
<td>Director of the Chautauqua Fund</td>
</tr>
<tr>
<td>George L. Follansbee, Jr.</td>
<td>Chief Executive Officer</td>
</tr>
<tr>
<td>Linda Jordan Loomis</td>
<td>Corporate Secretary</td>
</tr>
<tr>
<td>Deborah E. Moore, CPA</td>
<td>Chief Financial Officer</td>
</tr>
<tr>
<td>Timothy J. Mulholland</td>
<td>Research Associate</td>
</tr>
<tr>
<td>Megan E. Sorenson</td>
<td>Assistant Director of the Chautauqua Fund</td>
</tr>
<tr>
<td>Nicole Szydlo</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>Linda G. Steckley</td>
<td>Senior Major Gifts Officer</td>
</tr>
</tbody>
</table>

¹Coincides with term on the Chautauqua Institution’s Board of Trustees

ⅡCoincides with term as President of Chautauqua Institution
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 Arn - 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. Fausnbaugh - 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 G. Karslake - August 1994 to August 1995
Thomas R. Bromeley - August 1995 to June 2001
vic gelb - August 1995 to August 2011
Selena 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
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
Fred C. Gregory - August 2004 to August 2008
John W. Burden, III - August 2005 to October 2007
Kathryn J. Lincoln - August 2005 to December 2011
George T. Snyder - August 2006 to August 2007
Charlotte A. Fowler - August 2008 to December 2012

Former Board Leadership

Walter Roberts - August 1937 to August 1957
Harold F. Reed - August 1957 to August 1967
John D. Hamilton - August 1967 to August 1971
Richard H. Miller - August 1971 to August 1996
William F. Hill, II - August 1996 to August 2002
Lowell K. Strohl - August 2002 to August 2008